stadtschulrat
für wien

EdGATE

www.edgate.eu.com

INTERREG IIIC

Index No. 3E0044I

Operation Manual

Version 4 • 25.02.2005

North East South West
INTERREG IIIC

**PROJECT PART-FINANCED
BY THE EUROPEAN UNION**

CONTENTS

INTERREG IIIC: EdGATE

I. OPERATION

1 INTRODUCTION

1.1 Subject of the OPERATION MANUAL

Subject of this hereinafter referred to as **Operation Manual (OM)** is the description of the structure for all organisational, financial, legal, information and publicity measures that will be needed to successfully implement the INTERREG IIIC EdGATE operation.

The **OM** does not replace or substitute the **Partnership Agreement**, (cf. III. LEGAL CONDITIONS / 19. PARTNER AGREEMENT, p. 90) which the hereinafter referred to as **Lead Partner (LP)** and the **Partner Representatives (PR)** of the institutions involved will sign.

1.2 Duration of the agreement

This agreement will enter into force retrospectively (ex tunc) from 21 July 2004 onward. It shall terminate on the date each of the partners receives its quota of the final payment by the EU Commission to the CIP "INTERREG IIIC East Zone" according to Article 32(4) of Council Regulation (EC) No 1260/1999.

1.3 Obligations

The **LP** and the **Partners** commit themselves in doing everything in their power to foster the implementation of the operation according to the guidelines set out in the **OM** in correspondence with the obligations formulated in the Partnership Agreement.

1.4 Agreement

The following agreement of the **OM** shall be made between the **LP** and the institutions involved represented by their **PR** (listed according to INTERREG IIIC Application Form (**AF**)) for the implementation of the INTERREG IIIC operation Index No 3E0044I, EdGATE (Education Gate) approved by the Steering Committee of the Community initiative Programme (CIP) "INTERREG IIIC East Zone" on 5 Nov 04 (final approval).

Partner No.	Partner	Signature
LP	**European Office, Vienna Board of Education**, Auerspergstr. 15/32, A-1080 Vienna, Austria, represented by **Mag. Dr. Franz Schimek**	
2	**School of Education, University of Edinburgh**, Old College, South Bridge, Edinburgh EH8 9YL, Scotland, represented by **Prof. Richard Easton**	
3	**Masaryk University in Brno, Faculty of Arts, Department of Educational Sciences,** Arna Nováka 1, CZ 602 00, Brno, Czech Republic, represented by **Prof. Milan Pol**	
4	**Faculty of Education, Comenius University,** Racianska 59, SK 813 34,Bratislava, Slovak Republic, represented by **Prof. Gabriela Lojová**	
6	**Cracow Pedagogical University,** ul. Podchorazych 2, PL 30 084, Cracow, Poland, represented by **Prof. Mariusz Misztal**	

7	**Federal Ministry of Education and Science,** Obala Maka Dizdara 2, Sarajevo, BiH 71000, Bosnia Hercegovina, represented by **Vice-Minister Severin Montina**	
8	**Office for Education and Sport, City of Zagreb,** Ilica 25, HR 10000, Zagreb, Croatia, represented by **Ms Božica Šimleša**	
9	**Department of Education, City Assembly of Belgrade,** Trg Nikole Pasica 6, SM 11000, Belgrade, Serbia Montenegro, represented by **Ms Vesna Mirovic-Pjevac**	
10	**School Inspectorate of the County of Calarasi,** Strada Sloboziei 28, RO 910014, Calarasi, Romania, represented by **Mr Ion Chesca**	
11	**Open & Distance Learning Centre,** Sfantul Nicolae Str. 37, RO 910019, Calarasi, Romania, represented by **Mr Nicolae Micescu**	
12	**Main Education and Science Board, Kiev City State Administration,** Schevchenko Boulevard 3, UA 01004, Kiev, Ukraine, represented by **Ms Galina Isakova**	
13	**Ministry of Education, Science and Cultural Affairs, Mecklenburg-West Pomerania,** Werderstraße 124, D 19055, Schwerin, Germany, represented by **Mr Norbert Frank**	
14	**Institute for School and Further Education, Mecklenburg- West Pomerania,** Elleried 5, D 19061, Greifswald, Germany, represented by **Ms Ada Quade**	

Vienna, 14.10.2005

2 APPLICATION FORM

2.1 History of the application

This section contains excerpts from the Application Form (**AF)** which was submitted to the INTERREG IIIC East authorities at the Third Call on **30 April 2004**.

Extract from INTERREG IIIC East Homepage: www.interreg3c.net .

> "*20 July 2004*
> ## *Results: East Steering Committee*
>
> *Vienna, 20 July 2004. The INTERREG IIIC East Steering Committee met in Vienna to take funding decisions on the 66 project proposals submitted in the framework of the third call for proposals of the INTERREG IIIC East programme.*
>
> *The Committee announced to fund 25 interregional cooperation projects corresponding to a total EU-funding of about € 26 million. Projects are led by public bodies from the Czech Republic, Germany, Greece, Italy Hungary, Austria and Poland and involve more than 220 partners from 24 EU and nine neighbouring countries.*
>
> *The approved projects aim to improve the development of the participating regions. Fields of cooperation vary greatly, and include areas as diverse as SME Cooperation, Technology Start-Ups, Entrepreneurship, Town Planning, Cluster Management, Innovation Policy, Energy efficiency, E-governance, Transport Logistics and Cultural Heritage.*
>
> *"This was another highly competitive round with a lot of good quality proposals", said Walther Stöckl, Managing Authority IIIC East and Chair of the Committee. Stöckl was also positive about the fact that the participation of the new Member States has further increased. He also stressed the fact that for the first time three EU-wide IIIC operations will be led by institutions from the new Member States.*
>
> *The funding decisions announced by the Steering Committee today bring the total committed funds of the programme IIIC East to nearly € 60 million ERDF, which leaves a bit more than € 14 million ERDF available for the fourth and last round of proposals. This round was opened on 14 June 2004 and will close with a deadline for submitting project applications on 19 November 2004."*

The EdGATE operation was approved like the other 24 projects "under conditions' i.e. changes to the original application had to be made and the operation was to re-submitted by **30 November 2004**.
The changes were accepted and on **5 November 2004** the INTERREG IIIC East Steering Committee gave its final approval (delete: on 5 November 2004) with the Index No 3E0044I-B.

2.2 The geographical area of EdGATE

The European Union is divided into four INTERREG IIIC regions: North (blue), South (red), West (orange) and East (green). Third Countries (i.e. non-EU Member States) are coloured grey.

The regions involved in EdGATE are:
5 regions from Third Countries: Kiev (UA); Calarasi (RO) – (2 Partners); Sarajevo (BiH); Belgrade (SM); Zagreb (HR)
3 regions from EU 'new' Member States: Brno (CZ); Krakow (PL); Bratislava (SK)
3 regions from EU 'old' Member States: Edinburgh (UK); Schwerin (D) – 2 partners; Vienna (A).

In total there are 11 regions involved and 13 partners. The EU Member States are situated in the INTERREG IIIC West, North and East regions. Since Vienna as Lead Partner is situated in the **INTERREG IIIC East region** EdGATE is a INTERREG IIIC East operation.
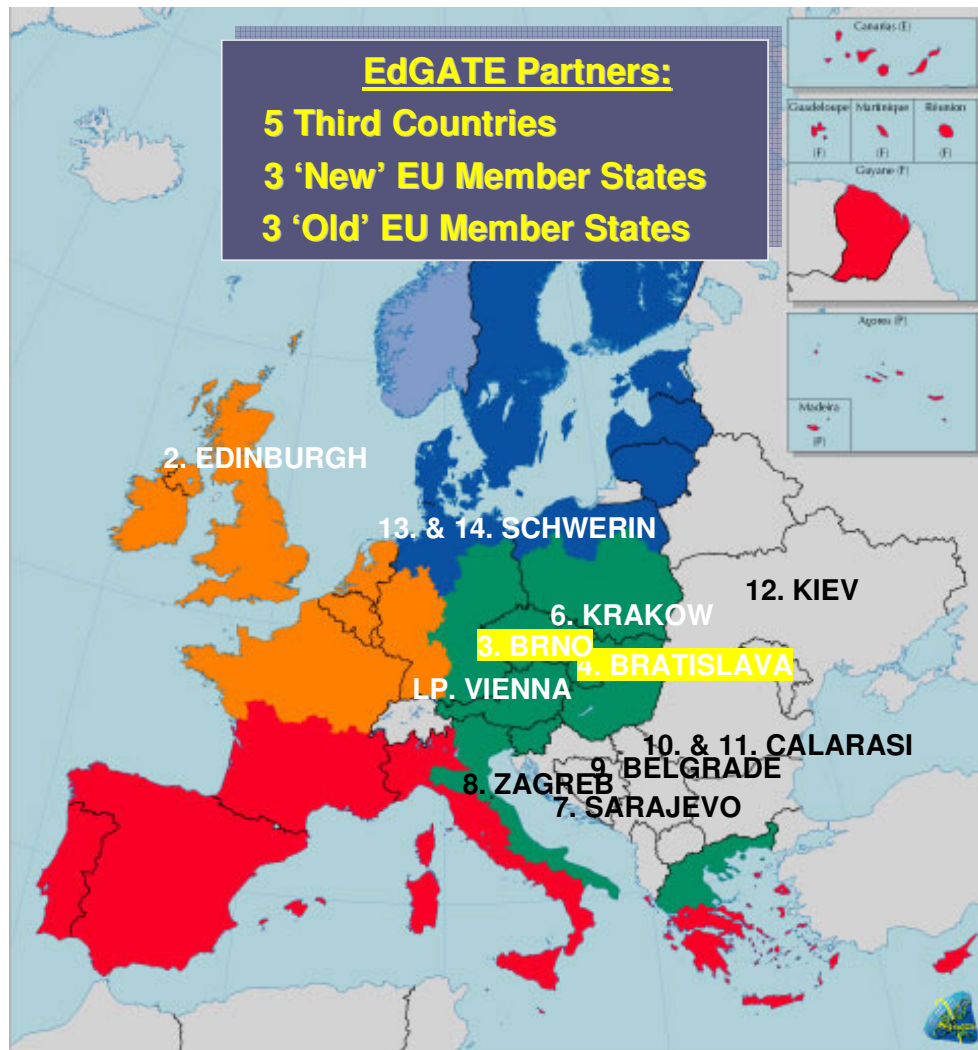
2.3 The EdGATE Logo

The five coloured circles arranged in the form of a gate represent the five components of the operation:

🔴 **Component 1: MANAGEMENT AND COORDINATION**

🔵 **Component 2: REGIONAL IMPLEMENTATION**

🟡 **Component 3: MOBILITY AND EXCHANGE**

⚫ **Component 4: PILOT: EUROPEAN REGIONAL COLLEGE**

🟢 **Component 5: DISSEMINATION**

2.4 Abbreviations used in INTERREG IIIC and EdGATE

The following abbreviations are part of INTERREG IIIC terminology:

Abbreviation	Meaning
ERDF	European Regional Development Fund. The EU fund which gives money to EU Member States so that they can run INTERREG IIIC projects.
MA	(INTERREG IIIC) Managing Authority. The **MA** is responsible for the management of all the INTERREG IIIC East operations. The **MA** is situated in Vienna (cf. www.interreg3c.net). .
PayA	(INTERREG IIIC) Paying Authority. The **PayA** is responsible for the financing of INTERREG IIIC East operations. The **PayA** is situated in Vienna.
JTS	(INTERREG IIIC) Joint Technical Secretariat. The **JTS** is responsible for day-to-day running of all INTERREG IIIC East operations. Every project has a Desk Officer at the **JTS**, who is solely responsible for the operation. The **JTS** is situated in Vienna.
RP	Reporting Period. Activities and spending in INTERREG IIIC operations are divided into six-monthly **RP**: e.g. Jan – Jun and Jul – Dec.

ProRe	Progress Report. At the end of each **RP** a **ProRe** must be submitted to the **JTS** containing information about the activities carried out in the **RP** (Activity Report) and the expenditure in the **RP** (Financial Report). Only after the approval of the **ProRe** by the **JTS** will the <mark>EU Member States regional partners</mark> receive reimbursement by the **PayA**.
AF	Application Form. The basis for the operation is the **AF**. The **ProRe** is compared with what was stated in the **AF** and in this way the progress and success of the operation can be monitored.

The following abbreviations are part of EdGATE terminology:

Abbreviation	Meaning
LP	Lead Partner. Every INTERREG IIIC operation must have at least one **LP**. The **LP** signs the Subsidy Contract with the INTERREG IIIC **JTS** and is legally and operationally responsible for the running of the operation. The **LP** is also responsible for submitting the six-monthly **ProRe** on 1 March for the **RP** Jul – Dec and on 1 September for the **RP** Jan – Jun.
PR	Partner Representative. Every partner institute in EdGATE has a **PR** (cf. list of Partner Representatives p. 7-8). The **PR** is responsible for the running of the operation in his/her institute.
FM	Financial Manager. Every partner institute in EdGATE has a **FM**, who is responsible for the financial matters of his/her institute. The **FM** is obliged to sending a Financial Report as part of the **ProRe** to the **LP** every six months. Only when the audited Financial Reports from all the partners (particularly from EU Member States) are collected can the **LP** submit the **ProRe** to the **JTS**: After this has been accepted the **PayA** will reimburse the **LP** with the outlays for the **RP**. The **LP** will then transfer the appropriate sums of money to the individual partners.
RC	Regional Coordinator. Every partner <u>region</u> in EdGATE has a **RC**, who is responsible for the regional coordination of the operative level of the project, particularly the activities in Components 3 & 4 (cf. p. 30-37 – "The Regional Coordinator (**RC**) will be responsible for: 1) organising workshops, 2) preparing workshop input; 3) disseminating results; 4) organising translation of documentation; 5) publicising the operation; 6) organising study visits to/from other regions, regional dissemination seminars.").
RE	Regional Expert. Every partner <u>region</u> in EdGATE will nominate five **RE**. <u>Four</u> will be nominated for two Priority Areas each in Component 3: Equality in Education (a) social inclusion, (b) gender mainstreaming; Quality in Education (c) quality assurance, (d) teacher education; Europe in Education (e) European dimension, (f) modern language tuition; Vocation in Education (g) vocational education (h) ICT (e-inclusion)). <u>One</u> **RE** for Component 4: Pilot – European Regional College. The **RE** is responsible for the production of results in the EdGATE that will positively influence regional economic development and stability in the partner regions.
RS	Regional Stakeholder. The **RS** is a person involved in regional politics and/or administration. As an **ERDF** Structural Fund project, EdGATE aims at positively influencing regional economic development and stability through educational measures. It is therefore essential that EdGATE has access to regional politics and administration. The **RS** is

	the 'go-between' between the operation and the region; he/she transports the aims and products of the operation into the region and at the same time transports the social, economic and infrastructural needs of the region into the EdGATE operation.
XRS	Extended Regional Stakeholder. To effectively spread the work of the EdGATE operation to as wide a regional public as possible the **RS** should liaise with other regional stakeholders (**XRS**)– preferably from the regional job market, finances and media.
SC	Steering Committee. The **SC** consists of the 13 **PR** from the partner institutions and is responsible for the launching, management, decision-making, evaluation, and coordination of the operation (cf. Graphic in 3. COORDINATION AND MANAGEMENT STRUCTURE, p. 18). The **SC** will meet once per **RP** (for details see Component 1 MANAGEMENT AND COORDINATION p. 23-26).
SC/RI	Steering Committee/Regional Implementation. The **SC** will meet with the **RS** once in a **RP**. As an **ERDF** Structural Fund project, EdGATE aims at positively influencing regional economic development and stability through educational measures. It is therefore necessary that EdGATE has access to regional politics and administration. This will happen in the **SC/RI** meetings (for details see Component 2 REGIONAL IMPLEMENTATION p. 27-29).
PA	Priority Area. In preliminaries meetings, the EdGATE partners identified the following 8 **PA**: Equality in Education (EQE): (a) social inclusion, (b) gender mainstreaming Quality in Education (QE): (c) quality assurance, (d) teacher education Europe in Education (EE): (e) European dimension, (f) modern language tuition Vocation in Education (VE): (g) vocational education; (h) ICT (e-inclusion). In the Workshops and Study Visits described in Component 3, **RE** will exchange experience and good practice as well develop new models in the PA (for details see Component 3 MOBILITY AND EXCHANGE p. 30-33).
ERC	European Regional College. In Component 4: PILOT: EUROPEAN REGIONAL COLLEGE a concept will be developed that can be implemented at regional level to improve the qualifications of regional workforces and at the same time increasing and enhancing mobility and cohesion by providing similar models of education in various regions in Europe. (for details see Component 4 PILOT: EUROPEAN REGIONAL COLLEGE p. 34-37).

2.5   Brief summary of the operation

Question in the AF: *"Please provide brief summary of the operation's background, objectives, partnership, main activities and expected outputs, results and impacts."*

Ca. 20 Mill. inhabitants live in the EdGATE regions. 13 partners are involved from 11 countries from INTERREG IIIC West, North and East areas. For many reasons economic, social and infrastructural improvement is necessary in all of these regions so that the Lisbon Goals for 2010 regarding the Knowledge Society, in the context of the operation, can be

supported. At numerous preliminary discussions and meetings during the genesis of the operation the following problems/issues were highlighted: preparation for programmed economic development; regional development being hindered by lack of training; infrastructural, social and ethnic issues blocking growth; geographic situations often slowing European integration; and the need for economic orientation to support social cohesion. These needs reflect EU policy issues such as 'Social Inclusion Strategy', 'Gender Mainstreaming', 'Social and Human Capital Interactions', etc. Educational policies will have long-term effects on the successful implementation of these issues. The Lead Partner co-ordinated an INTERREG IIIA project emphasising the Knowledge Society in the CENTROPE region. This operational experience is now to be transferred in the context of Network Project (Borders regions operations) into strategic measures in co-operation with other regions in Europe, whereby their regional situations will contribute to a wide-range of European experience. Initially, the topic of co-operation is related to the impact of enlargement on border regions to better co-ordinate existing policies, create new measures and strengthen economic competitiveness in particular in the areas of human resources and labour markets as well as qualification, innovation and the Knowledge Society. The partners in the operation will have the opportunity to contribute and profit from good practice from other regions for development in their particular regions. In particular, the following priority areas of educational development in the context of the Lisbon Goals will be addressed: (a) social inclusion, (b) gender mainstreaming; (c) quality assurance, (d) teacher education; (e) European dimension, (f) modern language tuition; (g) vocational education (h) ICT (e-inclusion). The objectives include: (a) identifying regional needs in cooperation with regional development authorities; (b) comparing/exchanging policies/good practice and adapting them for regional implementation; (c) fostering/implementing partner mobility; (d) developing policies/programmes offering solutions to identified regional development areas; (e) developing a pilot project (European Regional College), (f) disseminating/propagating the knowledge/experience gained to as many other institutions as possible (added value). Summarising: in the context of 'Learning for Participation in the Knowledge Society' the operation will support key skills and personal attributes: 'communication, numeracy, inter-personal skills, other skills and attributes.'

2.6   Brief history of the operation

Question in the AF: *"Please describe the history of the development of operation's idea and partnership, as well as partner involvement in developing the operation and application."*

1996 - 2003: General development of the INTERREG IIIA CERNET project – emphasis: the 'Knowledge Society' (A, SK, CZ, HU); - 2000-2001: International interest in CERNET increases; City of Vienna requests CERNET to extend contacts to other regions; - Oct. 2001: 1st ENCOUNTERS Conference in Vienna (BH, HR, SM, SK, HU, CZ); - Mar. 2002: Reciprocal visit in Zagreb, Office for Sport and Education (HR); - May 2002: 2nd ENCOUNTERS Conference in Sarajevo: Presentation of cross-border cooperation and good practice from the INTERREG IIIA regions (A, SK, CZ, HU); - June 2002: Reciprocal visit in Belgrade, Dept. of Education, City Assembly (SM); - Feb. 2003: Preparatory visit to Krakow Pedagogical University; - Apr. 2003: Preparatory visit to School Inspectorate and Open & Distance Learning Centre, Calarasi (RO); - since June 2003: Preparatory planning and first contacts to the INTERREG IIIC East JTS; - Jun. 2003: Preparatory visit to Dept. of Educational Sciences, Masaryk University, Brno; Oct. 2003: Preparatory visit to the School of Education, University of Edinburgh; - Oct 2003: Preparatory visit to Main Education and Science Board, Kiev; - Nov. 2003: Preparatory visit to Faculty of Education, Comenius University, Bratislava; - Nov. 2003: 3rd ENCOUNTERS Conference of all potential partners in Vienna; - Jan. 2004: Preparatory visit to Schwerin; - Feb. 2004: 4th ENCOUNTERS Conference of all partners in Vienna. As delineated above, evolving from a core hub of regions cooperating together (INTERREG IIIA CERNET), the number of partners with the

same interests and goals gradually increased. The operation was jointly developed in numerous preliminary meetings and conferences, where priority areas for regional development were highlighted. Each of the partners provided at least one area of their own expertise from which the other partners could profit to meet regional deficits. The 'organic' constellation of the partners (either regional education authorities or university teacher training institutes with close links to regional development authorities) provides opportunities to promote and support, in the context of the operation, the policy goal: "to become the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion".

2.7 Problem description

Question in the AF: *"Please describe what problem(s) and / or issue(s) the operation will address. Explain the background to the problem(s) / issue(s), their relevance to partnership and the INTERREG IIIC Programme."*

"Modernising the European social model, investing in people and combating social exclusion": 1) CENTROPE Region - Vienna (A), Brno (CZ), Bratislava (SK): Regional economic development is programmed for this area: (a) New economic centres (e.g. the world's fifth largest automotive cluster) will encourage increased work-force mobility highlighting the need for improved language learning. (b) Life-long learning and learning towards European Citizenship will support social cohesion and increase productivity. 2) Calarasi (RO): Regional development is being hindered by poor training opportunities: (a) A lack of a qualified workforce due to a weak vocational education system is preventing development in tourism and agriculture in the Danube Delta (b) The opportunity to ground SMEs is not being utilised because of lack of training. 3) Belgrade (SM): Infrastructural problems are a barrier to growth and development - a lack of structural and innovative change in teacher training means that European standards are not being met. 4) Zagreb (HR), Sarajevo (BH): Social and ethnic problems are a barrier to growth and development - specific social groups are not being integrated into the workforce because of disadvantaging at the educational level (e.g. women, Roma/Sinti). 5) Krakow (PL), Kiev (UA), Schwerin (D): Geographic situations of regions are slowing European integration - New orientation and inclusion in EU programmes is needed in Kiev, Krakow, and Schwerin to accelerate social, economic and infrastructural development. 6) Edinburgh (Sco, UK): Economic orientation is often towards the USA; a lack of 'Europe consciousness' is a barrier to European regional cohesion. Summary: 1) preparation for programmed economic development, 2) regional development being hindered by lack of training, 3) infrastructural, social and ethnic issues blocking growth, and 4) geographic situations often slowing European integration.

2.8 Objectives of the operation

Question in the AF: *"Please list and describe the overall objective and sub-objectives of the operation."*

Overall objective: To design policies and strategies that will support the transition to the knowledge-based economy and society at regional level in the context of "Strategies for jobs in the Information Society". The unique combination of partners offer an opportunity to transfer and exchange a wide range of experience, information as well as good practice, which can be implemented and/or adapted to particular regional situations. The partners are conscious that they have a responsibility to closely cooperate with their regional development authorities and political decision-making bodies. The policies developed in the context of EdGATE must have regional relevance. Sub-objectives: 1) to develop an Operations Manual delineating the necessary organisational, infrastructural, logistical, financial and information and publicity measures for this type of operation. 2) to identify regional needs in cooperation with regional stakeholders. 3) to compare and exchange policies/good practice with other

educational institutions and to adapt these policies and practice for regional implementation. 4) to foster and implement the mobility of all the partners involved in educational/regional development: (a) knowledge transfer; (b) experience transfer. 5) to develop guidelines/policies/programmes that will support the Lisbon Goals/Knowledge Society at regional level. At preparatory meetings the following areas were identified as priority areas: Equality in Education: (a) social inclusion, (b) gender mainstreaming; Quality in Education: (c) quality assurance, (d) teacher education; Europe in Education: (e) European dimension in education, (f) modern language tuition; Vocation in Education: (g) vocational education; (h) ICT (e-inclusion). 6) to develop a pilot and demonstration project (European Regional College). 7) to disseminate and propagate the knowledge and experience gained from the operation to as many other regions in Europe as possible (added value).

2.9 Expected outputs, results and impacts of the operation

Question in the AF: *"Please describe the*
- outputs (tangible and visible outcomes or products of the operation's activities, such as meetings, guides, websites, databases),
- results (e.g. transfer of best practices from one region to another, development of a joint project between two regions, increased human resource capacities, etc.) and
- long term impacts (e.g. improvement of the efficiency of Structural Funds implementation, the contribution to the sustainable development of participating regions)
the operation intends to produce.
Whenever possible, please use measurable indicators for measuring the outputs, results and impacts."

Outputs
The following outputs, results and long term impacts were listed in the AF and have to be fulfilled in the appropriate Reporting Periods (RP) – see detailed descriptions of the five Components pp. 23-41.

Component 1 – MANAGEMENT AND COORDINATION (pp. 23-26)
7 SC Meetings; 6 LP Consultations; 7 SC Meeting Minutes; 6-24 LP Consultation Reports; 1 Operation Manual; 6 Progress Reports & 1 Final Programme Report (JTS); overall Information and Publicity Measures (1 kick-off event (1 day); 1 Homepage; 1000 calendars; 1000 image brochures; 2000 info folders; 2 posters; 1 banner; 3 international press conferences).

Component 2 – REGIONAL IMPLEMENTATION (pp.27-29)
6 Regional Implementation (RI) Meetings; 6 Regional Implementation (RI) Meeting Minutes; Regional Stocktaking Documents; Annual Regional Evaluation Feedbacks.

Component 3 – MOBILITY AND EXCHANGE (pp. 30-33)
8 Priority Area (PA) Workshops); 22 Priority Area (PA) Study Visits, 8 Priority Area Workshop Minutes; 22 Priority Areas Study Visit Logs; 1 Best Practice Manual, 1 Priority Areas New Models Catalogue, 44 Priority Areas Reports.

Component 4 – PILOT: EUROPEAN REGIONAL COLLEGE (pp. 34-37)
4 European Regional College (ERC) Conferences; 4 European Regional College (ERC) Conference Minutes; 1 European Regional College (ERC) Concept; 1 Set of proposals for EU and regional funding of European Regional College (ERC) Concept.

Component 5 – DISSEMINATION (pp. 38-41)
1 Interim Conference; 1 Final Conference; 10 Regional Dissemination Seminars; 10 regional press conferences; 1 Interim Conference Minutes; 1 EdGATE Report Interim; 1 EdGATE

Report Final; 10 Regional Dissemination Seminar Reports; 66 (six-monthly) Regional Activity Reports. Results: transfer and exchange of best practice; development of ERC concept. Impacts: 1) promotion of art. 2. and 3 of the EC Treaty regarding equal opportunities for women and men; promotion of human and social capital as drivers for employment and social cohesion (including e-inclusion). 2) Developing and fostering a consciousness of the concept of European citizenship. 3) Increased knowledge of the effects of Structural Fund programmes at regional level: 4) Improvement of the efficiency of Structural Fund implementation. 5) Increased insight into the development of educational policies as a means of sustainable economic development.

2.10 Approach and methodology

Question in the AF: *"Please describe what approach and methodology (activities, their combination and sequence) will be used to produce the intended outputs, results and impacts, and achieve the objectives of the operation? Explain the relation of the chosen methodology to the selected Type of Operation."*

At the numerous preparatory meetings and discussion the partners committed themselves to participation in all 5 components. The operation's Steering Committee (SC) consists of 13 Partner Representatives (PR). Component 1: SC provides the basis and structure for the operation. It is the overall decision-making body. It will develop and implement the Operation Manual (organisational structure, financial guidelines, time-plan, logistics and information/publicity measures). The Information/Publicity Measures will support and extend internal ('partner knowledge') and external communication ('public awareness') and disseminate and propagate the knowledge and experience gained from the operation to as many other regions in Europe as possible in the context of added value and ensure that the results of the operation are imbedded and implemented into regional development policy regarding economic growth, infrastructural improvement and social cohesion. An ongoing responsibility will be to monitor the operation's effectiveness and, if necessary, to make adjustments, in particular, regarding effectiveness and efficiency of implementation. Component 2: Regional Implementation (RI) (= municipality and/or regional province) of the outcomes of the operation will be defined and implemented. An ongoing evaluation and analysis of the regional feasibility of the measures will be carried out. Component 3 involves 8 Priority Areas (PA) two-day workshops involving Regional Experts (RE), who will develop policies and programmes concentrating on Priority Areas that will contribute maximal benefit to regional attempts to fulfil the Lisbon Goals. As an extension, each region will be given the opportunity to carry out 2 two-day PA Study Visits at other partner institutions. Component 4: at preparatory meetings and in various contacts with regional authorities a strong interest was expressed for the development of a general concept for a 'European Regional College (ERC)'. RE will develop the ERC Concept in such a way that authorities can implement the concept at regional level to improve the qualifications of the regional workforce and at the same time to increase and enhance mobility and cohesion by providing similar models of education in various regions in Europe. With the help of external expertise, RE (ERC) will also provide a set of proposals for EU and/or regional funding to implement the ERC model. In component 5: Information/Publicity Measures will be implemented to market the work of the operation to ensure the regional sustainability of results. It will include Interim and Final Conferences and Regional Dissemination Seminars to propagate the ideals of INTERREG IIIC and EdGATE.

3 COORDINATION AND MANAGEMENT STRUCTURE
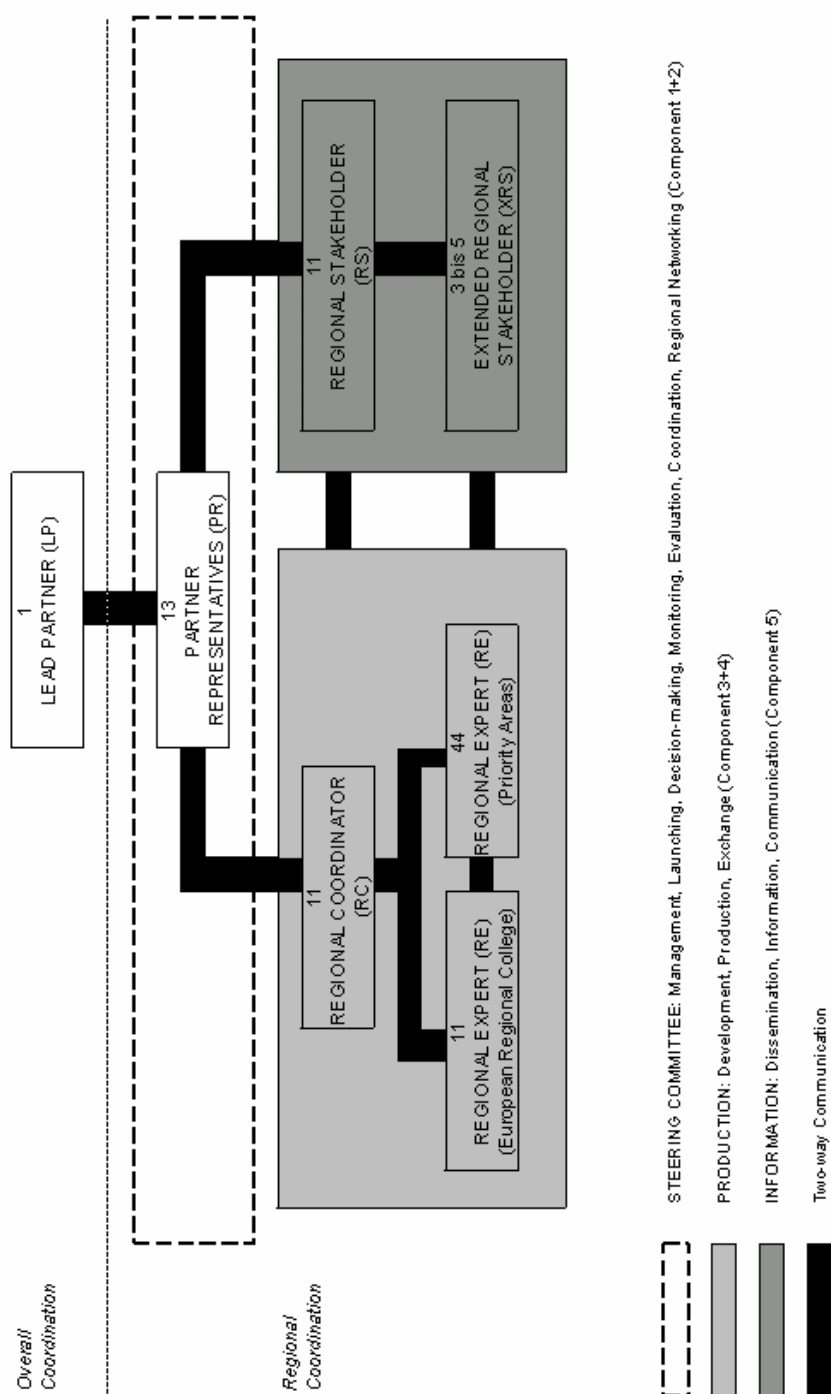
4 OVERVIEW OF COMPONENTS AND TYPES OF MEETINGS

<table>
<tr><td colspan="10">EdGATE - OVERVIEW OF COMPONENTS AND TYPES OF MEETINGS
EdGATE: 07.2004 – 11.2007 = 41 Months: Type of Operation: Network / 13 different partners / 11 different regions / 6 EU Member S</td></tr>
<tr>
<td></td>
<td>RP 1
Jul-Dec 2004</td>
<td>RP 2
Jan-Jun 2005</td>
<td>RP 3
Jul-Dec 2005</td>
<td>RP 4
Jan-Jun 2006</td>
<td>RP 5
Jul-Dec 2006</td>
<td>RP 6
Jan-Jun 2007</td>
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</tr>
<tr><td colspan="10">Legend: LP = Lead Partner; PR = Partner Representative; FM = Financial Manager; RC = Regional Coordinator;
XRS = Extended Regional Stakeholder; RE = Regional Expert; EE = External Expert (e.g. EU / national funding; Eur
RP = Reporting Period; ProRe = Progress Report</td></tr>
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<td></td>
<td></td>
<td>ProRe 1 – 1.3.05</td>
<td>ProRe 2 – 1.9.05</td>
<td>ProRe 3 – 1.3.06</td>
<td>ProRe 4 – 1.9.06</td>
<td>ProRe 5 – 1.3.07</td>
<td>Pr</td>
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</tr>
<tr>
<td>Component 1):
Management and
Coordination
(Launching,
Coordination and
Evaluation
Component)</td>
<td>Date: 6-7 Dec
Location: Vienna
Type: SC Meeting 1
Days: 2
Participants: 13 PR & 13 FM = 26</td>
<td>Date: 21 Feb
Location: Vienna
Type: SC Meeting 2
Days: 1
Participants: 13 PR & 11 RC = 24</td>
<td>Date: 17 Oct
Location: Vienna
Type: SC Meeting 3
Days: 1
Participants: 13 PR</td>
<td>Date: 13 Feb
Location: Vienna
Type: SC Meeting 4
Days: 1
Participants: 13 PR</td>
<td>Date: 16 Oct
Location: Vienna
Type: SC Meeting 5
Days: 1
Participants: 13 PR</td>
<td>Date: 11 June
Location: Vienna
Type: SC Meeting 6
Days: 1
Participants: 13 PR & 11 RC = 24</td>
<td>Dat
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<tr>
<td></td>
<td></td>
<td>Date: Jan - Jun
Location: Partner region (to be specified)
Type:
LP Consultation 1
Days: 1-4
Participants: 1 LP</td>
<td>Date: Jul - Dec
Location: Partner region (to be specified)
Type:
LP Consultation 2
Days: 1-4
Participants: 1 LP</td>
<td>Date: Jan - Jun
Location: Partner region (to be specified)
Type:
LP Consultation 3
Days: 1-4
Participants: 1 LP</td>
<td>Date: Jul - Dec
Location: Partner region (to be specified)
Type:
LP Consultation 4
Days: 1-4
Participants: 1 LP</td>
<td>Date: Jan - Jun
Location: Partner region (to be specified)
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LP Consultation 5
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	RP 1 Jul-Dec 2004	RP 2 Jan-Jun 2005	RP 3 Jul-Dec 2005	RP 4 Jan-Jun 2006	RP 5 Jul-Dec 2006	RP 6 Jan-Jun 2007		
Legend: LP = Lead Partner; PR = Partner Representative; FM = Financial Manager; RC = Regional Coordinator; XRS = Extended Regional Stakeholder; RE = Regional Expert; EE = External Expert (e.g. EU / national funding; Eur RP = Reporting Period; ProRe = Progress Report								
		ProRe 1 – 1.3.05	ProRe 2 – 1.9.05	ProRe 3 – 1.3.06	ProRe 4 – 1.9.06	ProRe 5 – 1.3.07	Pr	
Component 2) Regional Implementation (Networking and Communication Component)		Date: **22 Feb** Location: **Vienna** Type: **SC/RI Meeting 1** Days: **1** Participants: **13 PR & 11 RC & 11 RS = 35**	Date: **18 Oct** Location: **Vienna** Type: **SC/RI Meeting 2** Days: **1** Participants: **13 PR & 11 RS & 11 XRS = 35**	Date: **14 Feb** Location: **Vienna** Type: **SC/RI Meeting 3** Days: **1** Participants: **13 PR & 11 RS = 24**	Date: **17 Oct** Location: **Vienna** Type: **SC/RI Meeting 4** Days: **1** Participants: **13 PR & 11 RS = 24**	Date: **12 June** Location: **Vienna** Type: **SC/RI Meeting 5** Days: **1** Participants: **13 PR & 11 RS & 11 RC & 1 EE (EU Funding) = 36**	Dat Loc Typ **SC** Day Par & 1	

	RP 1 Jul-Dec 2004	RP 2 Jan-Jun 2005	RP 3 Jul-Dec 2005	RP 4 Jan-Jun 2006	RP 5 Jul-Dec 2006	RP 6 Jan-Jun 2007		
Legend: LP = Lead Partner; PR = Partner Representative; FM = Financial Manager; RC = Regional Coordinator; XRS = Extended Regional Stakeholder; RE = Regional Expert; EE = External Expert (e.g. EU / national funding; Eur RP = Reporting Period; ProRe = Progress Report								
		ProRe 1 – 1.3.05	ProRe 2 – 1.9.05	ProRe 3 – 1.3.06	ProRe 4 – 1.9.06	ProRe 5 – 1.3.07		
Component 3): **Mobility and** **Exchange (Action** **Component)**		Date: 2-3 May Location: **Schwerin** Type: **PA Workshops 1 &** **2 (Priority areas** **EQE (a), (b), QE (c),** **(d))** Days: **2** Participants: **1 LP &** **1 PR & 1 RC & 11** **RE per WS = 25**	Date: **7-8 Oct** Location: **Brno** Type: **PA Workshops 3 &** **4 (Priority areas EE** **(e), (f), VE (g), (h))** Days: **2** Participants: **1 LP &** **1 PR & 1 RC & 11** **RE per WS = 25**		Date: **Sep** Location: **Bratislava** Type: **PA Workshops 5 &** **6 (Priority areas** **EQE (a), (b); QE (c),** **(d))** Days: **2** Participants: **1 LP &** **1 PR & 1 RC & 11** **RE per WS = 25**	Date: 26-27 Feb Location: **Krakow** Type: **PA Workshops 7 &** **8 (Priority areas EE** **(e), (f), VE (g), (h))** Days: **2** Participants: **1 LP &** **1 PR & 1 RC & 11** **RE per WS = 25**		
		Date: **Jan – Jun** Location: **Partner** **Regions** Type: **PA Study** **Visits 1-3 for** **Priority areas EQE** **(a), (b), QE (c), EE** **(d), (e), VE (f), (g),** **(h)*** Days: **2** Participants: **11 RE**	Date: **Jul – Dec** Location: **Partner** **Regions** Type: **PA Study** **Visits 4 – 10 for** **Priority areas EQE** **(a), (b), QE (c), EE** **(d), (e), VE (f), (g),** **(h)*** Days: **2** Participants: **11 RE**	Date: **Jan - Jun** Location: **Partner** **Regions** Type: **PA Study** **Visits 11 – 17 for** **Priority areas EQE** **(a), (b), QE (c), EE** **(d), (e), VE (f), (g),** **(h)*** Days: **2** Participants: **11 RE**	Date: **Jul - Dec** Location: **Partner** **Regions** Type: **PA Study** **Visits 18 – 22 for** **Priority areas EQE** **(a), (b), QE (c), EE** **(d), (e), VE (f), (g),** **(h)*** Days: **2** Participants: **11 R**			

	RP 1 Jul-Dec 2004	RP 2 Jan-Jun 2005	RP 3 Jul-Dec 2005	RP 4 Jan-Jun 2006	RP 5 Jul-Dec 2006	RP 6 Jan-Jun 2007		
Legend: LP = Lead Partner; PR = Partner Representative; FM = Financial Manager; RC = Regional Coordinator; XRS = Extended Regional Stakeholder; RE = Regional Expert; EE = External Expert (e.g. EU / national funding; RP = Reporting Period; ProRe = Progress Report							
		ProRe 1 – 1.3.05	ProRe 2 – 1.9.05	ProRe 3 – 1.3.06	ProRe 4 – 1.9.06	ProRe 5 – 1.3.07		
Component 4): Pilot: ERC - European Regional College (Planning and Fostering Component)		Date: **6-7 June** Location: **Vienna** Type: **ERC Conference 1** Days: **2** Participants: **1 LP & 1 PR & 1 RC & 11 RE & 1 EE (European School) = 15**	Date: **7-8 Nov** Location: **Krakow** Type: **ERC Conference 2** Days: **2** Participants: **1 LP & 1 PR & 1 RC & 11 RE & 1 EE (European School) = 15**		Date: **6-7 Nov** Location: **Schwerin** Type: **ERC Conference 3** Days: **2** Participants: **1 LP & 1 PR & 1 RC & 11 RE & 1 EE (European School) = 15**	Date: **23-24 Apr** Location: **Edinburgh** Type: **ERC Conference 4** Days: **2** Participants: **1 LP & 1 PR & 1 RC & 11 RE & 1 EE (European School) = 15**		
Component 5): Dissemination (Information and Publicity Component)		Date: **24 May** Location: **Vienna** Type: **International kick-off meeting** Days: **1** Participants: **1 LP**		Date: **29-30 May** Location: **Edinburgh** Type: **Interim Conference** Days: **2** Participants: **2 LP & 13 PR & 11 RS & 11 RC & (delete &) 22 RE & 1 EE (EU Funding) & 1 EE (European School) = 61**	Date: **Oct – Dec** Location: **Partner regions** Type: **Dissemination Seminars 1 -5** Days: **1** Participants: **1 PR & 1 RC & 2 RE** (1 each from components 3 & 4) & **1 RS & 3 XRS = 8**	Date: **Feb - Apr** Location: **Partner regions** Type: Dissemination **Seminars 6 - 10** Days: **1** Participants: **1 PR & 1 RC & 2 RE** (1 each from components 3 & 4) & **1 RS & 3 XRS = 8**	Dat Loc Typ **Fin** Day Par 13 11 & 1 Sch

5 COMPONENT 1: MANAGEMENT AND COORDINATION

5.1 Description of the component

The strategic focus is 1) Develop organisational, financial, infrastructural, and information/publicity measures; 2) Produce and implement the Operation Manual (OM); 3) Monitor the progress of operation (Progress Reports), evaluate its efficiency and support partner input; 4) Develop strategies to disseminate/propagate mainly to an interested general public (Europe-wide added value). The component will consist of Steering Committee (SC) Meetings and Lead Partner Consultations. The Steering Committee (SC) will be responsible for development of the Operation Manual, which will set out the organisational structure of the operation, the information policy (incl. a Homepage with Intranet (partner knowledge) and Internet (public awareness – added value) facilities), the financial guidelines (reporting, auditing, etc.), the operation time-plan and the format and logistics of the activities (Components 3-4). The SC will liaise with the Regional Coordinators (RC) for the Priority Areas (PA) (Component 3), the development of the European Regional College (ERC) (Component 4) as well as developing strategies to disseminate/propagate the results of the operation mainly to an interested general public (Europe-wide added value). An ongoing responsibility will be to monitor the operation's effectiveness and, if necessary, to make adjustments, in particular, regarding the effectiveness and efficiency of the implementation (time plan/budget plan). During this component the members of the SC are required to consult and liaise with their regional development authorities. In the course of the Component the sub-objective 1) will be fulfilled: the development of an Operation Manual delineating the necessary organisational, infrastructural, logistical, financial and Information/Publicity Measures for this type of operation including directions how institutions which are not themselves regional development authorities can cooperate with these authorities.

5.2 Strategic focus

1) Develop organisational, financial, infrastructural, and information/publicity measures. 2) Produce and implement Operation Manual. 3) Monitor progress of operation (Progress Reports), evaluate efficiency and support partner input. 4) Develop strategies to disseminate/propagate mainly to an interested general public (Europe-wide added value).

5.3 Responsible partner

Partner no. 1: Lead Partner (The European Office, Vienna Board of Education) will coordinate this component.

5.4 Involved partners

All 13 partners - Steering Committee (SC) members = Partner Representatives (PR). (Regional Coordinators (RC) and Finance Managers (FM) will attend certain SC Meetings)

5.5 Planned results

1) Improved efficiency in the launching, coordination, evaluation and management of a Structural Fund Operation. 2) Improved understanding of the management, financial and strategic requirements of a Structural Fund Operation. 3) Initiation of strategy development in the context of a Structural Fund Operation to meet Lisbon Goals/Knowledge Society.

5.6 Total eligible costs

€ 345.739,00.

5.7 Result indicators and their qualification

1) 37 participants (13 Partner Representatives (PR) at 7 Meetings / 13 Finance Managers (FM) & 11 Regional Coordinators (RC) at 2 Meetings) with intensive knowledge and insight in

the running of a Structural Fund Operation. 2) 11 regional development authorities with an increased knowledge of a Structural Fund Operation. 3) Increased number of citizens informed of a structural fund operation and its effect.

5.8 Expected outputs and their quantification

SC Meetings; SC Meeting Minutes; Lead Partner (LP) Consultations; LP Consultation Reports; Operation Manual (OM); Information/Publicity Measures (IPM); Progress Reports; 7 SC Meetings - 1/2 days; 7 SC Meeting Minutes; 6 LP Consultations – 1/4 days; 6-24 Consultation Reports; 1 Operation Manual (OM); 6 Progress Reports & 1 Final Report (JTS); overall Information/Publicity Measures (1 kick-off event (1 day); 1 Homepage; 1000 calendars; 1000 image brochures; 2000 info folders; 2 posters; 1 banner; 3 international press conferences).

5.9 Time plan

Reporting Period 1: Jul – Dec 04

Activities
The first two-day initial Steering Committee (SC) meeting will be held in Vienna in Dec 04 involving all Partner Representatives (PR) from all partner institutions as well as the Finance Managers (FM). The SC will discuss and develop a first draft of the Operation Manual which will govern the organisational structure of the operation, publicity/information measures (incl. Homepage with intranet (partner knowledge) and Internet (public awareness – added value) facilities), the financial guidelines (reporting, auditing, etc.), the operation time-plan and the format and logistics of the activities. Guidelines for the design of the operation Homepage will be agreed upon as well as the reporting procedure (6-monthly progress reports) (JTS). The SC will also liaise with 11 Regional Coordinators (RC) and 11 Regional Stakeholders (RS).

Output
1st Steering Committee (SC) Meeting (13 PR) & 13 FM; (2 days) in Vienna; 1 Steering Committee (SC) Meeting Minutes; first draft of the Operations Manual and design of the Homepage.

Reporting Period 2: Jan – Jun 05

Activities
The second one-day Steering Committee (SC) meeting will be held in Vienna in Feb 05. The Committee will consider feedback from all the partner institutions, finalise and agree to the Operation Manual (OM). The SC will also finalise the concept for the Information/Publicity Measures (IPM). 1st Progress Report (JTS) will be finalised. If necessary, 1-4 day LP Consultation(s) can take place with individual partner institutions. If Consultations take place a report will be compiled.

Output
2nd Steering Committee Meeting (13 PR & 11 RC) (1 day) in Vienna; SC Meeting Minutes; final version of Operation Manual (OM); final version of the Publicity/Information Measures; First Progress Report (JTS); 1-4 day LP Consultation(s) can take place with individual partner institutions. If Consultations take place a Report will be compiled.

Reporting Period 3: Jul – Dec 05

Activities
The third one-day SC meeting will be held in Vienna in Oct 05. The Steering Committee will monitor the progress of the operation as detailed in the second Progress Report for the period Jan – Jun 05. It will also consider the outcomes of the Priority Area (PA) workshops 1-

2 in Schwerin and 3-4 in Brno as well as the first ERC Conference in Bratislava. SC will consider the first draft of the Best Practice Manual for Priority Areas: Equality in Education (EQE): (a) social inclusion, (b) gender mainstreaming; Quality in Education (QE): (c) quality assurance, (d) teacher education; Europe in Education (EE): (e) European dimension in education, (f) modern language tuition; vocation in education (VE): (g) vocational education; (h) ICT (e-inclusion) produced during the four workshops as well as the first framework of the ERC Concept produced during the first conference. If necessary, 1-4 day LP consultation(s) can take place with individual partner institutions.

Output
3rd Steering Committee (SC) Meeting (13 PR) (1 day) in Vienna; SC Meeting Minutes, Second Progress Report (JTS); 1-4 day LP Consultation(s) can take place with individual partner institutions. If consultations take place a Report will be compiled.

Reporting Period 4: Jan – Jun 06

Activities
The fourth one-day Steering Committee (SC) meeting will be held in Vienna in Feb 06. The SC will discuss preparation of the third Progress Report. Emphasis will be placed on the marketing of the operation. The SC will continue to develop and implement the publicity/information measures of the operation. The SC will monitor the progress of the operation, in particular the efficiency and outcomes of the second ERC Conference in Krakow (COMPONENT 4) and consider the second framework of the ERC concept produced during the second conference. The SC will also plan the Interim Conference in Edinburgh in May 06. If necessary, 1-4 day LP consultation(s) can take place with individual partner institutions.

Output
4th Steering Committee (SC) Meeting (13 PR) (1 day) in Vienna; SC Meeting Minutes (including plans for Interim Conference); Third Progress Report (JTS); 1-4 day LP consultations can take place with individual partner institutions. If consultations take place a Report will be compiled.

Reporting Period 5: Jul – Dec 06

Activities
The fifth one-day Steering Committee SC meeting will be held in Vienna in Oct 06. SC will monitor the progress of the operation as detailed in the fourth Progress Report in particular the efficiency and outcomes of the Interim Conference. The SC will continue to develop and implement the information policy of the operation; in particular the results of the EdGATE Report Interim will be marketed ('added value'). It will consider the outcomes of the Priority Areas (PA) Workshops 5-6 in Bratislava and the first part of the Priority Areas New Models Catalogue for the Priority Areas: Equality in Education (EQE): (a) social inclusion, (b) gender mainstreaming; Quality in Education (QE): (c) quality assurance, (d) teacher education. The SC will consider the ensuing 10 Regional Dissemination Seminars in all of the partner regions (with the exception of Edinburgh (venue of the Interim Conference). If necessary, 1-4 day LP Consultation(s) can take place with individual partner institutions.

Output
5th Steering Committee (SC) Meeting (13 PR) (1 day) in Vienna; SC Meeting Minutes; Fourth Progress Report (JTS); 1-4 day LP consultations can take place with individual partner institutions. If consultations take place a Report will be compiled.

Reporting Period 6: Jan – Jun 07

Activities

The sixth one-day Steering Committee (SC) meeting will be held in Vienna in June 07. The SC will continue to develop and implement the publicity/information measures. SC will monitor the progress of the operation in particular the efficiency and outcomes of the Priority Workshops 7-8 in Krakow and the ERC Conferences 3 & 4 in Schwerin & Edinburgh. It will also consider the second and final part of the Priority Areas New Models Catalogue for the Priority Areas: Europe in Education (EE): (e) European dimension in education (f) modern language tuition; Vocation in Education (VE) (g) vocational education, (h) ICT (e-inclusion) and the final draft of the ERC Concept. SC will consider the outcomes of the Regional Dissemination Seminars. The SC will plan the concept for the Final Conference in Vienna in Oct. / Nov. 07. If necessary, a 1-4 day LP Consultation can take place with an individual partner institution.

Output

6th Steering Committee (SC) Meeting (13 PR) & 11 RC (1 day) in Vienna; SC Meeting Minutes (including plans for Final Conference);Fifth Progress Report (JTS); 1-4 day LP consultation(s) can take place with individual partner institutions. If consultations take place a Report will be compiled.

Reporting Period 7: Jul – Dec 07

Activities

The seventh and final one-day Steering Committee (SC) meeting will be held in Vienna in Oct 07. SC will monitor the progress of the operation as detailed in the sixth Progress Report. SC will also prepare the Final Programme Report for the EU Commission. If necessary, a 1-4 day LP consultation(s) can take place with individual partner institutions.

Output

7th Steering Committee (SC) (13 PR) & 13 FM (1 day) Meeting in Vienna; SC Meeting Minutes; Sixth Progress Report (JTS); 1-4 day LP consultation(s) can take place with individual partner institutions. If consultations take place a Report will be compiled.

6 COMPONENT 2: REGIONAL IMPLEMENTATION (NETWORKING AND COMMUNCIATION COMPONENT)

6.1 Description of the component

Regional Implementation: This Component will bring together the Partner Representative (PR) with regional players (regional and extended stakeholders (RS & XRS)) in order to implement operation's products at regional level (this will include identifying regional (= municipality and/or regional province) economic/infrastructural strengths, weaknesses and needs; defining needed Priority Areas (PA) (cf. Lisbon Goals), evaluating and analysing regional feasibility). The purpose of the Component is to 1) improve knowledge of the participating regions (= municipality and/or regional province); 2) to initiate the process of developing and implanting strategies to meet Priority Areas (Lisbon Goals/Knowledge Society) and 3) to network with the Extended Regional Stakeholders (XRS) (e.g. job market, media, finances, etc). The Component will ensure an efficient implementation of the operation's products at regional level and provide a platform for an ongoing liaison between operation output and regional (= municipality and/or regional province) implementation. There will be two-way communication – operational output into the regions and regional requirement demands and feasibility back to the operation. The regional players will present at RI Meetings a Regional Stocktaking Document which will describe the particular structural needs of their region. This will define the emphases of operational production. The regional players will provide ongoing evaluation in the form of a short annual written Feedback to the SC.

6.2 Strategic focus

1) Identify regional (= municipality and/or regional province) economic/infrastructural strengths, weaknesses and needs. 2) Define needed Priority Areas (PA) (cf. Lisbon Goals), ongoing evaluation and analysis of regional feasibility. 3) Liaise operation output/regional implementation. 4) Implement operation's products at regional level.

6.3 Responsible partner

Partner No. 1. Lead Partner (The European Office, Vienna Board of Education) will coordinate this component.

6.4 Involved partners

All 13 partners – Regional Implementation (RI) = Partner Representatives (PR) & Regional Stakeholders (RS). (Regional Coordinators (RC) & Extended Regional Stakeholders (XRS) from the regional job market sector, media, and finance will attend certain RI meetings).

6.5 Planned results

1) Improved knowledge of participating regions (= municipality and/or regional province). 2) Initiation of the process of developing and implanting strategies to meet Priority Areas (Lisbon Goals/Knowledge Society). 3) Networking with Extended Regional Stakeholders (XRS) (e.g. job market, media, finances, etc).

6.6 Total eligible costs

€ 190.168,00.

6.7 Result indicators and their quantification

1) 47 participants (13 Partner Representatives (PR) & 11 Regional Stakeholder (RS) at 6 Meetings / 11 Regional Coordinators (RC) at 2 Meetings / 11 Extended Regional Stakeholders (XRS) & 1 External Expert (EE) at 1 meeting) with understanding of the Lisbon Goals and their regional implementation. 2) 11 regional development authorities with

understanding of the Lisbon Goals and their regional implementation. 3) Increased number of citizens informed of the Lisbon Goals/Knowledge Society.

6.8   Expected outputs and their quantification

Regional Implementation (RI) Meetings (1 day); Regional Implementation (RI) Meeting Minutes; ongoing liaison between operation output and regional (= municipality and/or regional province) implementation; Regional Stocktaking Document; Annual Evaluation Feedback

6 Regional Implementation (RI) Meetings – 1 day; 6 Regional Implementation (RI) Meeting Minutes, 11 Regional Stocktaking Documents; 33 Annual Regional Evaluation Feedbacks

6.9   Time plan

Reporting Period 1: Jul – Dec 04

Activities
Correspondence and liaison with Regional Stakeholders (RS).

Output

Reporting Period 2: Jan – Jun 05

Activities
First one-day Regional Implementation (RI) Meeting in Vienna in Feb 05. The participants will report, discuss and evaluate operational output and its correlation to the needs and requirements of the regions involved. The Regional Stocktaking Document will also be discussed (will describe the particular structural needs of regions); also the role of XRS will be discussed (XRS will be present at next SC/RI Meeting 2 on 18 Oct 2005 in Vienna).

Output
1st Regional Implementation (RI) Meeting (13 PR & 11 RC & 11 RS = 35) (1 day): Regional Implementation Meeting Minutes; (delete 11 Regional Stocktaking Documents.)

Reporting Period 3: Jul – Dec 05

Activities
Second one-day Regional Implementation (RI) Meeting in Vienna in Oct 05. The participants will continue to report, discuss and evaluate operational output and its correlation to the needs and requirements of the regions involved. The Regional and Extended Regional Stakeholders (RS & XRS) will evaluate the feasibility of operational output for the needs of their regions.

Output
2nd Regional Implementation (RI) Meeting (13 PR & 11 RS & 11 XRS = 35) (1 day): Regional Implementation Meeting Minutes; 11 Regional Stocktaking Documents; 11 Annual Evaluation Feedbacks.

Reporting Period 4: Jan – Jun 06

Activities
Third one-day Regional Implementation (RI) Meeting in Vienna in Feb 06. The participants will continue to report, discuss and evaluate operational output and its correlation to the needs and requirements of the regions involved. The Regional and Extended Regional Stakeholders (RS & XRS) will evaluate the feasibility of operational output for the needs of their regions.

Output

3rd Regional Implementation (RI) Meeting (13 PR & 11 RS = 24) (1 day): Regional Implementation Meeting Minutes.

Reporting Period 5: Jul – Dec 06

Activities

Fourth one-day Regional Implementation (RI) Meeting in Vienna in Oct 06. The participants will continue to report, discuss and evaluate operational output and its correlation to the needs and requirements of the regions involved. The Regional and Extended Regional Stakeholders (RS & XRS) will evaluate the feasibility of operational output for the needs of their regions.

Output

4th Regional Implementation (RI) Meeting (13 PR & 11 RS = 24) (1 day): Regional Implementation Meeting Minutes; 11 Annual Evaluation Feedbacks

Reporting Period 6: Jan – Jun 07

Activities

Fifth one-day Regional Implementation (RI) Meeting in Vienna in June 07. The participants will continue to report, discuss and evaluate operational output and its correlation to the needs and requirements of the regions involved. The Regional and Extended Regional Stakeholders (RS & XRS) will evaluate the feasibility of operational output for the needs of their regions. An External Expert (EU Funding) will attend this meeting to give input and an overview of possibilities for EU funding for the implementation of the operation's products at regional level.

Output

5th Regional Implementation (RI) Meeting (13 PR & 11 RS & 11 RC & 1 EE (EU Funding) = 36) (1 day): Regional Implementation Meeting Minutes.

Reporting Period 7: Jul – Dec 07

Activities

Sixth and final one-day Regional Implementation (RI) Meeting in Vienna in Oct 07. The participants will continue to report, discuss and evaluate operational output and its correlation to the needs and requirements of the regions involved. The Regional and Extended Regional Stakeholders (RS & XRS) will evaluate the feasibility of operational output for the needs of their regions.

Output

6th and final Regional Implementation (RI) Meeting (13 PR & 11 RS = 24) (1 day): Regional Implementation Meeting Minutes; 11 Annual Evaluation Feedbacks.

7 COMPONENT 3: MOBILITY AND EXCHANGE (ACTION COMPONENT)

7.1 Description of the component

The correlation of educational measures and their contribution to regional development is the core issue of this component, which involves 8 two-day Priority Area Workshops involving Regional Experts (RE), who will develop policies and programmes to meet the Lisbon Goals. Following Priority Areas were identified in preparatory meetings: Equality in Education (EQE): (a) social inclusion, (b) gender mainstreaming; Quality in Education (QE): (c) quality assurance, (d) teacher education; Europe in Education (EE): (e) European dimension, (f) modern language tuition; Vocation in Education (VE): (g) vocational education; (h) ICT (e-inclusion). (This list can be adapted at regional implementation meetings (Component 2) or it can add new priority areas.) Extension: each region will carry out 2 two-day study visits to other partner institutions. Participants are required to complete a PA Study Visit Log, highlighting aspects that could be adapted to improve growth in their own region. The Regional Coordinator (RC) will be responsible for: 1) organising workshops, 2) preparing workshop input; 3) disseminating results; 4) organising translation of documentation; 5) publicising the operation; 6) organising study visits to/from other regions, regional dissemination seminars. PA workshops 1-4 aim at pooling regional expertise in each of the Priority Areas and developing a Best Practice Manual, highlighting how a particular measure is contributing to the economic stability of a region/alternatively showing how it could contribute more to regional economic stability (close cooperation with regional development authorities necessary). Participants will present (written description/graphic presentation) regional measures in each of the priority areas. Between Workshops 1-4 and 5-8, RE will carry out R&D (research and development). Workshops 5-8, ideally involving the same participants, aim at, based on the Best Practice Manual, developing Priority Areas New Models Catalogue, i.e. one new model combining all the best aspects from each Priority Area, applicable for all partner regions. The Priority Areas New Models Catalogue should support sustainable regional economic growth and stability. Developments and concepts resulting from this component will be integrated in the work of Component 4 and form part of the European Regional College (ERC) Concept. The majority of the operation's sub-objectives will be fulfilled in this component: 2) to identify regional needs in cooperation with regional development authorities. 3) to compare and exchange policies/good practice with other educational institutions and to adapt these policies and practice for regional implementation. 4) to foster and implement the mobility of all the partners involved in educational/regional development: (a) knowledge transfer; (b) experience transfer. 5) to develop guidelines/policies/programmes that will support the Lisbon Goals/Knowledge Society at regional level.

7.2 Strategic focus

1) Foster/implement partner mobility and exchange of expertise. 2) Compare/exchange policies/good practice; adapt/implement to regional situations. 3) Produce Best Practice Manual (BPM) and Priority Areas New Models Catalogue (PANMC) supporting Lisbon Goals/Knowledge Society 4) Support development of ERC Concept through BPM and PANMC.

7.3 Responsible partner

Partner No. 1. Lead Partner (The European Office, Vienna Board of Education) will coordinate this component.

7.4   Involved partners

All 13 partners – Lead Partner (LP) & Partner Representative (PR), Regional Coordinator (RC) & Regional Experts (RE) for Priority Areas (PA).

7.5   Planned results

1) Initiation of a permanent network of Regional Experts (RE) with improved knowledge of best practice in other regions in Europe. 2) Insight among regional experts/regional stakeholders of the correlation between educational strategies and regional development/cohesion as a basis for the achievement of the Lisbon Goals.

7.6   Total eligible costs

€ 398.309,00.

7.7   Result indicators and their quantification

1) 53 participants (1 Lead Partner at 8 Priority Area (PA) Workshops / 4 Partner Representatives (PR) & 4 Regional Coordinators (RC) & 44 Regional Experts (RE) at 1 WS each) with increased knowledge/insight of educational policy and its effect on regional development. 2) 11 regional development authorities with increased understanding of the correlation of educational policy and sustainable regional development. 3) Increased number of citizens informed of best practice in education and new regional models to promote/support the Lisbon Goals.

7.8   Expected outputs and their quantification

Priority Areas Workshops; Priority Areas Workshop Minutes; Priority Areas Study Visits; Priority Areas Study Visit Logs; Best Practice Manual; Priority Areas New Models Catalogue (input for ERC Concept); 8 Priority Areas Workshops (2 days); 8 Priority Areas Workshop Minutes; 22 Priority Area Study Visits (2 days); 22 Priority Areas Study Visit Logs; 1 Best Practice Manual (produced after Workshops 1-4); 1 Priority Areas New Models Catalogue (produced after Workshops 5 – 8); 22 Priority Areas Study Visit Reports.

7.9   Time plan

Reporting Period 1: Jul – Dec 04

Activities
Correspondence and liaison with Regional Coordinators (RC) and Regional Experts (RE) for Priority Areas.

Reporting Period 2: Jan – Jun 05

Activities
Two 2-day Workshops in Schwerin in May 05 - Priority Areas: Equality in Education & Quality in Education (with sub-topics). Participants present regional priority areas measures, highlighting how they contribute to the economic stability of the region/alternatively showing how they could contribute more. Exact format of the workshops will be finalised by SC – possible form: Day 1: reports about measures in the regions in the above mentioned Priority Areas. Day 2: reports compiled into first part of Best Practice Manual. Participants produce a work-plan for R&D (research and development) to be carried out (per e-mail and/or intranet facilities) before Workshops 5-6. 2-day study visits: RE visit other partner institutions to exchange experience and gain first-hand insight into Priority Areas measures and complete a Study Visit Log, highlighting aspects that could be adapted to improve growth in their own region (formulated in PA Study Visit Reports (in national language)).

Output

Priority Areas Workshops 1-2 (1 LP, 1 PR, 1 RC, 11 RE per Workshop) (2 days); PA Workshop Minutes (including plans for R&D); First part of Best Practice Manual; PA Study Visits 1-3; 3 PA Study Visit Logs; 3 Priority Areas Study Visit Reports (national language).

Reporting Period 3: Jul – Dec 05

Activities

Two 2- Day Workshops in XXXXX in Oct 05 - Priority Areas: Europe in Education & Vocation in Education (with sub-topics). Participants present regional Priority Areas measures, highlighting how they contribute to the economic stability of the region/alternatively showing how they could contribute more. Exact format of the Workshops will be finalised by SC – possible form: Day 1: reports about measures in the regions in the above mentioned Priority Areas. Day 2: reports compiled into second part of Best Practice Manual. Participants produce a work-plan for R&D (Research and Development) to be carried out (per e-mail and/or intranet facilities) before Workshops 5-6. 2-day study visits: RE visit other partner institutions to exchange experience and gain first-hand insight into Priority Areas measures and complete a Study Visit Logs, highlighting aspects that could be adapted to improve growth in their own region (formulated in PA Study Visit Report (in national language)).

Output

Priority Areas Workshops 3-4 (1 LP, 1 PR, 1 RC, 11 RE per Workshop) (2 days); PA Workshop Minutes (including plans for R&D); Second part of Best Practice Manual; PA Study Visits 4-10; 7 PA Study Visit Logs; 7 Priority Areas Study Visit Reports (national language).

Reporting Period 4: Jan – Jun 06

Activities

Interim Conference in Edinburgh in May 06. All participants, who took part in Priority Areas Workshops 1-4 will take part and present the Best Practice Manual describing which educational measures the partner regions are implementing ín the Priority Areas: Equality in Education (EQE), Quality in Education (QE), Europe in Education; Vocation in Education (VE) /with sub-topics). In particular, it will be shown how these particular measures are contributing to the social, economic and infrastructural stability of the region/ alternatively, where these measures could contribute more to economic growth. Participants will also report on the progress and results of R&D. RE visit other partner institutions to exchange experience and gain first-hand insight into Priority Areas measures and complete Study Visit Logs, highlighting aspects that could be adapted to improve growth in their own region (formulated in PA Study Visit Report (in national language)).

Output

Attendance at Interim Conference. Best Practice Manual of the Priority Areas containing an objective evaluation of the degree of efficiency the measures have on the social, economic and infrastructural stability of regions. Progress and result reports on R&D. PA Study Visits 11-17; 7 PA Study Visit Logs; 7 PA Study Visit Reports (national language).

Reporting Period 5: Jul – Dec 06

Activities

Two 2- day Workshops in XXXXX in Sep 06 - Priority Areas: Equality in Education & Quality in Education (with sub-topics). Workshops 5-6, ideally involving the same participants, aim at, based on the Best Practice Manual, developing first part of Priority Areas New Models Catalogue, i.e. one new model combining all the best aspects from each Priority

Area, applicable for all partner regions. The Priority Areas New Models Catalogue should support sustainable regional economic growth and stability. Developments and concepts resulting from this component will be integrated in the work of Component 4 and form part of the European Regional College (ERC) Concept. 2-day Study Visits: RE visit other partner institutions to exchange experience and gain first-hand insight into Priority Areas measures and complete a Study Visit Log, highlighting aspects that could be adapted to improve growth in their own region (formulated in PA Study Visit Reports (in national language)).

Output
Priority Areas Workshops 5-6 (1 LP, 1 PR, 1 RC, 11 RE per Workshop) (2 days); PA Workshop Minutes; First Part of Priority Areas New Models Catalogue; PA Study Visits 18-22; 5 PA Study Visit Logs; 5 Priority Areas Study Visit Reports (national language).

Reporting Period 6: Jan – Jun 07

Activities
Two 2- day Workshops in Krakow in Feb 07 - Priority Areas: Europe in Education & Vocation in Education (with sub-topics). Workshops 7-8, ideally involving the same participants, aim at, based on the Best Practice Manual, developing second part of Priority Areas New Models Catalogue, i.e. one new model combining all the best aspects from each Priority Area, applicable for all partner regions. The Priority Areas New Models Catalogue should support sustainable regional economic growth and stability. Developments and concepts resulting from this Component will be integrated in the work of Component 4 and form part of the European Regional College (ERC) Concept. (delete: 2-day Study Visits: RE visit other partner institutions to exchange experience and gain first-hand insight into Priority Areas measures and complete Study Visit Logs, highlighting aspects that could be adapted to improve growth in their own region (formulated in PA Report (in national language)).

Output
Priority Areas Workshops 5-6 (1 LP, 1 PR, 1 RC, 11 RE per Workshop) (2 days); PA Workshop Minutes; Second Part of Priority Areas New Models Catalogue. (delete: PA Study Visits 34-44; 11 PA Study Visit Logs; 22 Priority Areas Reports (national language).

Reporting Period 7: Jul – Dec 07

Activities
Final Conference in Vienna in Oct 07. all participants, who took part in Priority Areas Workshops 5-8 will take part and present the Priority Areas New Model Catalogue of Priority Areas: Equality in Education (EQE), Quality in Education (QE), Europe in Education; Vocation in Education (VE) /with sub-topics). In particular, it will be shown how these particular measures will contribute to the social, economic and infrastructural stability of a region.

Output
Attendance at Final Conference.

8   COMPONENT 4: PILOT: ERC – EUROPEAN REGIONAL COLLEGE (PLANNING AND FOSTERING COMPONENT)

8.1   Description of the component

ERC Conferences: At all the preparatory meetings and in the various contacts with regional authorities a strong interest was expressed for the development of a general concept for a 'European Regional College (ERC)'. The college should be based on international models but adapted in such a way that it can be implemented at regional level. The concept will developed so that authorities can implement the concept at regional level to improve the qualifications of regional workforces and at the same time increase and enhance mobility and cohesion by providing similar models of education in various regions in Europe. ERC RE will also develop a set of proposals for EU and regional funding to implement such Colleges at regional level. Similar to the procedure governing Component 3, one expert per institution will be nominated to participate. The task of the ERC RE is to develop a concept that will have a realistic chance of being implemented at the regional level of the operation partners. In this way, the concept will have common denominator quality, ensuring mobility and cohesion and at the same time allowing freedom of implementation according to regional situations. The Concept will also incorporate all developments and concepts resulting from Component 3 in the Priority Areas: Equality in Education, Quality in Education, Europe in Education, Vocation in Education (with sub-topics). All documentation developed by the group will be sent to SC and be made available on Intranet and Internet. In the course of this component Sub-objective 6) a general concept 'European Regional College (ERC)' based on regional and international models; 2) methods of implementation based on regional conditions; 3) curricula; and 4) educational material with the emphasis on Peace Education and European Citizenship will be developed.

8.2   Strategic focus

1) Develop and foster a consciousness of the concept of European citizenship through the development of a joint educational model – pilot and demonstration project (European Regional College). 2) Develop proposals for further funding for implementation of ERC Concept.

8.3   Responsible partner

Partner No. 1. Lead Partner (The European Office, Vienna Board of Education) will coordinate this component.

8.4   Involved partners

All 13 partners – Lead Partner (LP) & Partner Representative (PR), Regional Coordinator (RC) & Regional Experts (RE) for European Regional College (ERC) Concept, External Expert (EE) for European school models.

8.5   Planned results

1) Initiation of a permanent network of Regional Experts (RE) with improved knowledge of best practice in other regions in Europe. 2) Insight among regional experts/regional stakeholders of the correlation between educational strategies and regional development/cohesion as a basis for the achievement of the Lisbon Goals.

8.6   Total eligible costs

€ 188.480,00.

8.7 Result indicators and their quantification

1) 54 participants (1 Lead Partner at 4 ERC Conferences / 4 Partner Representatives & 4 Regional Coordinators & 44 Regional Experts & 1 External Expert at 1 ERC Conf. each) with increased knowledge of regional workforce training needs. 2) 11 regional development authorities with increased knowledge of educational measures to support regional development. 3) Increased number of citizens aware of educational measures to promote/support the Lisbon Goals/Knowledge Society and to encourage workforce mobility and sustainable regional development.

8.8 Expected outputs and their quantification

European Regional College (ERC) Conferences; European Regional College (ERC) Conference Minutes; European Regional College (ERC) Concept; proposals for funding of European Regional College (ERC) implementation; 4 European Regional College (ERC) Conferences (2 days); 4 European Regional College (ERC) Conference Minutes; 1 European Regional College (ERC) Concept; 1 set of proposals for EU and regional funding of European Regional College (ERC) Concept.

8.9 Time plan

Reporting Period 1: Jul – Dec 04

Activities
Correspondence and liaison with Regional Coordinators (RC) and Regional Experts (RE) for European Regional College Concept.

Reporting Period 2: Jan – Jun 05

Activities
First 2-day ERC Conference in Vienna in June 05. RE will consider international and regional models and initiate the development process (input from External Expert (EE)). Regional conditions will be taken into consideration which will affect the feasibility of regional implementation. From the outset, partners will liaise with their regional development authorities. the exact format of the meeting will be finalised by the SC but could have the following form: Day 1: Reports from the participants regarding the existing educational landscape of their region, highlighting specific qualifications the regional workforce requires; input from External Expert (EE). Descriptions of international and regional models being implemented in their regions will also be given. Day 2: Development of first framework of ERC Concept listing common denominator qualities for all the regions and possible models, which would meet these qualities.

Output
1st European Regional College (ERC) Conference (1 LP, 1 PR, 1RC, 11 RE, 1 EE) (2 days); ERC Conference Minutes; First framework of ERC Concept.

Reporting Period 3: Jul – Dec 05

Activities
Second 2-day ERC Conference in Krakow in Nov 05. RE will continue to consider international and regional models; continue the development process (input from External Expert (EE)). Feedback from the partners will discussed and integrated into the concept. A first draft of possible proposals for EU and regional funding will be produced. The exact format of the meeting will be finalised by the SC but could have the following form: Day 1: Editing of the draft of Concept to include feedback from the regions. Day 2: Further development of Concept including first draft of proposals for EU and regional funding to implement regional ERCs.

Output

2nd European Regional College (ERC) Conference (1 LP, 1 PR, 1RC, 11 RE, 1 EE) (2 days); ERC Conference Minutes; Second framework of ERC Concept; First draft of proposals for EU and regional funding.

Reporting Period 4: Jan – Jun 06

Activities

Interim Conference in Edinburgh in May 2006. All participants, who took part in the ERC Conferences will attend the Interim Conference and will present the interim stage of the Concept including methods of implementation based on regional conditions, curricula and educational material with the emphasis on peace education and European citizenship). A set of proposals for EU and regional funding to implement such colleges at regional level will be presented. The ERC Concept will improve the qualifications of regional workforces and at the same time increase and enhance mobility and cohesion by providing similar models of education in various regions in Europe. The participants will also report on any existing regional developments towards the implementation of the ERC Concept.

Output

Attendance at Interim Conference.

Reporting Period 5: Jul – Dec 06

Activities

Third 2-day ERC Conference in Schwerin in Nov 06. RE will continue to consider international and regional models; continue the development process (input from External Expert (EE)). Feedback from the partners will discussed and integrated into the concept. A third framework for the ERC Concept as well as a second draft of possible proposals for EU and regional funding will be produced. The exact format of the meeting will be finalised by the SC but could have the following form: Day 1: Editing of the draft of Concept to include feedback from the regions. Day 2: further development of Concept including second draft of proposals for EU and regional funding to implement regional ERCs.

Output

3rd European Regional College (ERC) Conference (1 LP, 1 PR, 1RC, 11 RE, 1 EE) (2 days); ERC Conference Minutes; Third framework of ERC Concept; Second draft of possible proposals for EU and regional funding.

Reporting Period 6: Jan – Jun 07

Activities

Fourth and final 2-day ERC Conference in Edinburgh in Apr 07. RE will continue to consider international and regional models; finalise the development process (input from External Expert (EE)). Feedback from the partners will discussed and integrated into the concept. Final version of ERC Concept as well as a final set of proposals for EU and regional funding will be produced. The exact format of the meeting will be finalised by the SC but could have the following form: Day 1: Editing of the draft of Concept to include feedback from the regions. Day 2: Finalisation of ERC Concept and set of proposals for EU and regional funding to implement regional ERCs.

Output

4th European Regional College (ERC) Conference (1 LP, 1 PR, 1RC, 11 RE, 1 EE) (2 days); ERC Conference Minutes; Final ERC Concept; Final set of proposals for EU and regional funding.

Reporting Period 7: Jul – Dec 07

Activities

Final Conference in Vienna in Oct 07. All the participants, who took part in the ERC Conferences will attend and present the ERC Concept including methods of implementation based on regional conditions, curricula and educational material with the emphasis on peace education and European citizenship. Proposals for EU and regional funding to implement ERCs at regional level will be presented. RE will highlight how the ERC Concept will improve the qualifications of regional workforces and at the same time increase and enhance mobility and cohesion by providing similar models of education in various regions in Europe. Any existing regional developments towards the implementation and realisation of the ERC Concept will also be presented. The Concept/list of proposals will be published both in written form and posted on the operation's workshop available to as many other regions in Europe as possible ('added value). Final Concept will also be part of the EdGATE Report Final.

Output

Attendance at Final Conference.

9 COMPONENT 5: DISSEMINATION (INFORMATION AND PUBLICITY COMPONENT)

9.1 Description of the component

The final component aims at developing and implementing Publicity/Information Measures to inform as many experts/specialists in Europe as possible (region-specific added value). It will include strategies for dissemination in printed/electronic form, for the organisation of Interim/Final Conferences as well as Regional Dissemination Seminars to propagate the ideals of EdGATE. In particular, the component will have the following aims: 1) support and extend internal ('partner knowledge') and external communication ('public awareness') (Homepage, Intranet, conferences, publications; 2) disseminate and propagate knowledge and experience gained from the operation to as many other regions in Europe as possible ('added value'). The main focus will be the development of operational and regional strategies to propagate the operation and ensure that the results of the operation are imbedded and implemented into regional development policy regarding economic growth, infrastructural improvement and social cohesion. All operation documentation, as well as the Homepage will be in English. In the course of this component Sub-objective 7) to disseminate and propagate the knowledge and experience gained from the operation to as many other regions in Europe as possible in the context of added value will be implemented. The measures will fundamentally involve four main areas: 1) EdGATE Homepage – the operation will develop it's own Homepage to support and extend internal ('partner knowledge' - Intranet) and external communication ('public awareness' - Internet) of the EdGATE operation as well as to disseminate and propagate the knowledge and experience gained from the operation to as many other regions in Europe as possible in the context of added value. 2) Conferences – the two planned conferences (Interim & Final) aim at bringing together all operation participants to increase internal ('partner knowledge'') and extend external ('public awareness') through accompanying press conferences or other PR activities. 3) Regional Dissemination Seminars – these seminars aim at informing as wide spectrum as possible of politicians, decision-makers, experts, and interested public in all of the involved partner regions regarding the goals of the EdGATE operation as an INTERREG IIIC Structural Fund programme and its influence on the economic, social and infrastructural situation of regions. 4) Publications – the operation will produce a series of publications to inform a wider public of the work of a structural fund programme including 6-monthly Regional Activity Reports (in national language) delineating the progress and results of the operation.

Kommentar: Where do they appear? To be written by RCs: including 6-monthly Regional Activity Reports (in national language) delineating the progress and results of the operation

9.2 Strategic focus

1) Extend the internal ('partner knowledge') and external communication ('public awareness') of the operation (Intranet/Internet, conferences, publications, etc. 2) Develop strategies to disseminate/propagate the knowledge and experience gained from the operation to as many experts/specialists in Europe as possible (region-specific added value).

9.3 Responsible partner

Partner No. 2: School of Education, University of Edinburgh) will coordinate this component.

9.4 Involved partners

All 13 partners - Lead Partner (LP) & Partner Representatives (PR) & (Extended) Regional Stakeholders (RS/XRS) & Regional Coordinators (RC) & Regional Experts for Priority Areas (PA) and European Regional College Concept & External Experts & other stakeholders - representatives from industry, commerce, media and education, etc.

9.5 Planned results

1) Initiation of a permanent process of cross-documentation regarding regional educational issues and developments. 2) Extended publicity about a Structural Fund operation and the support given by it to sustainable regional development; encourage workforce mobility and fulfil the Lisbon Goals/Knowledge Society.

9.6 Total eligible costs

€ 267.296,00.

9.7 Result indicators and their quantification

1) 72 participants (2 LP & 13 PR & 11 RC & 11 RS & 11 XRS & 22 RE & 2 EE at Interim and Final Conference / 1 PR & 1 RC & 2 RE & 1 RS & 3 XRS at 1 Regional Dissemination Seminar) and other stakeholders with increased knowledge of Structural Fund Operations and their effect on regional development. 2) Increased number of citizens informed and made aware of best practice in education and plans to develop new regional models (promoting and supporting the Lisbon Goals/Knowledge Society) and encouraging sustainable regional development.

9.8 Expected outputs and their quantification

Interim Conference; Interim Conference Minutes; EdGATE Report Interim; Final Conference; EdGATE Report Final; Regional Activity Reports; Regional Dissemination Seminars (RDS); RDS Reports; Regional Information/Publicity Measures; 1 Interim Conference (2 days); 1 Interim Conference Minutes; 1 EdGATE Report Interim; 1 Final Conference (1 day); 1 EdGATE Report Final; 66 (six-monthly) Regional Activity Reports (Jan 05 – Dec 07); 10 Regional Dissemination (RD) Seminars (1 day); 10 RD Seminar Reports; 10 regional press conferences.

> **Kommentar:** Regional Dissemination Reports: develop forms

> **Kommentar:** Produce forms for the Regional Activity Reports

9.9 Time plan

Reporting Period 1: Jul – Dec 04

Activities
Correspondence and liaison with Regional Coordinators (RC), Regional Stakeholders (RS) and Extended Regional Stakeholders (XRS) regarding preparation of publicity/information measures.

Reporting Period 2: Jan – Jun 05

Activities
Preparation and organisation of international kick-off meeting. Regional Coordinators write Regional Activity Report (in national language) describing the progress and activities of the operation for regional dissemination. Correspondence and liaison with Regional Coordinators (RC), Regional Stakeholders (RS) and Extended Regional Stakeholders (XRS) regarding preparation of Publicity/Information Measures.
Regional Exchange Meetings will be organised where RC and RE meet with RS to discuss outcomes of Study Visits.

> **Kommentar:** Develop guidelines

Output
1 international kick-off meeting. 11 Regional Activity Reports (in national language). 3 Regional Exchange Meetings.

Reporting Period 3: Jul – Dec 05

Activities
Organisation of Regional Exchange Meetings: Regional Coordinators (RC) and Regional Experts (RE) with Regional Stakeholders to discuss outcomes of Study Visits. Regional Coordinators write Regional Activity Report (in national language) describing the progress and activities of the operation for regional dissemination.

Output
11 Regional Activity Reports (in national language). 7 Regional Exchange Meetings.

Reporting Period 4: Jan – Jun 06

Activities
2-day Interim Conference in Edinburgh in May 06: All participants from Components 1, 2, 3 and 4 will report on the progress of the activities of the first operational period. Comp. 1: will report on the operation's effectiveness and efficiency of the implementation; Future PR strategies for the second half of the operation period will be delineated (Regional Dissemination Seminars, ongoing Homepage, publications and Final Conference). Comp. 2: will report on the ongoing evaluation and implementation of operational products at regional level. Comp. 3: will report on the results of Priority Areas Workshops 1-4, present Best Practice Manual and give a preview of forthcoming PA Workshops 5-8. Reports of Study Visits will be presented. Comp. 4 will present the Interim ERC concept and proposals for EU and regional funding. An EdGATE Report Interim will published in printed/electronic form and disseminated to a wider interested general public ('added value'').
Regional Exchange Meetings will be organised where RC and RE meet with RS to discuss outcomes of Study Visits.

> **Kommentar:** Develop guidelines

Output
1 Interim Conference (2 LP & 13 PR & 11 RS (delete: & 33 XRS) & 11 RC & 22 RE & 1 EE (EU Funding) & 1 EE (European School) = 61) (2 days); Interim Conference Minutes; EdGATE Report Interim; 11 Regional Activity Reports (in national language), 7 Regional Exchange Meetings.

Reporting Period 5: Jul – Dec 06

Activities
5 one-day Regional Dissemination Seminars (organised by Regional Coordinators): One participant each from Comp. 3-4 hold a meeting in their region to present EdGATE to a wider regional public (politicians/decision-makers, representatives from industry and commerce, the media, educational experts and a wider interested public). Exact format will be finalised by SC; suggested form: 1st Session – PR & RC present the operation/goals of the Structural Fund programme. Regional Stakeholder (RS) presents regional implementation (RI). RE from Component 3 presents results of PA Workshops, highlighting correlation: educational measures/regional development. 2nd Session: RE from Comp. 4 presents Interim ERC concept/significance of regional implementation. Seminar closes with feedback/question session. EdGATE Report Interim will be distributed. Dissemination Seminar Reports will be compiled highlighting issues that were raised by the audience. Regional press conferences will be held.
Regional Exchange Meetings will be organised where RC and RE meet with RS to discuss outcomes of Study Visits.

> **Kommentar:** Develop guidelines

Output

Regional Dissemination Seminars 1-5 (1 PR & 1 RC & 2 RE (1 each from components 3 & 4) & 1 RS & 3 XRS = 8) (1 day); 5 Regional Dissemination Seminar Reports; 5 regional press conferences; 11 Regional Activity Reports (in national language). 5 Regional Exchange Meetings.

Reporting Period 6: Jan – Jun 07

Activities

5 one-day Regional Dissemination Seminars (organised by Regional Coordinators): One participant each from Comp. 3-4 hold a meeting in their region to present EdGATE to a wider regional public (politicians/decision-makers, representatives from industry and commerce, the media, educational experts and a wider interested public). Exact format will be finalised by SC; suggested form: 1st Session – PR & RC present the operation/goals of the Structural Fund programme. Regional Stakeholder (RS) presents regional implementation (RI). RE from Component 3 presents results of PA Workshops, highlighting correlation: educational measures/regional development. 2nd Session: RE from Comp. 4 presents Interim ERC concept/significance of regional implementation. Seminar closes with feedback/question session. EdGATE Report Interim will be distributed. Dissemination Seminar Reports will be compiled highlighting issues that were raised by the audience. Regional press conferences will be held. (delete: Regional Exchange Meetings will be organised where RC and RE meet with RS to discuss outcomes of Study Visits.)

Output

Regional Dissemination Seminars 6-10 (1 PR & 1 RC & 2 RE (1 each from components 3 & 4) & 1 RS & 3 XRS = 8) (1 day); 5 Regional Dissemination Seminar Reports; 5 regional press conferences; 11 Regional Activity Reports (in national language). (delete: 11 Regional Exchange Meetings.)

Reporting Period 7: Jul – Dec 07

Activities

1-day Final Conference in Vienna in Oct 07 will bring together all the operation participants for the last time. They will report on the results of the operation and present the final documentation: Priority Areas New Models Catalogue; Final ERC concept and a set of proposals for EU and regional funding. The Steering Committee will give a review of the operation, in particular regarding its effectiveness in positively influencing and supporting the economic, social and infrastructural situations of the regions involved and supporting regional attempts to meet the Lisbon Goals/Knowledge Society. EdGATE Report Final will be compiled and made available not only in electronic but also in published form and disseminated to a wider interested general public ('added value'').

Output

1 Final Conference (2 LP & 13 PR & 11 RS (delete: & 33 XRS) & 11 RC & 11 RE & 1 EE (EU Funding) & 1 EE (European School) = 50) (1 day); EdGATE Report Final; 11 Regional Activity Reports (in national language).

10 PREDICTED OVERALL WORK SCHEDULE AND RESPONSIBILITES

The following **predicted work schedule** (status: Feb 2005) lists outputs, activities, responsible partners, start a
chronologically according to **delivery date**.
There are three 'time' categories: reporting period, month and component.

NB. The OVERALL WORK SCHEDULE (in conjunction with the OVERVIEW OF COMPONENTS AND TYP
'internal motor' of the EdGATE operation. It is <u>essential</u> that it be constantly consulted so that outputs a
delivered on time.
There are <u>two</u> tables: <u>Table 1: OVERVIEW OF OUTPUTS / ACTIVITIES</u> and <u>Table 2: DETAILED WORK SC</u>
responsibilities of the Lead Partner are shaded e.g.):

Component 1	Month	Outputs	Activity	Responsibilty		
	Jul-Nov	OM draft 1	Prepare first draft OM; send to PR	PC		

Partner Representatives (PR) are required to constantly check the OVERALL WORK SCHEDULE (th
schedule) so that they can monitor the progress of their institution regarding the delivery of outputs.

<u>**Legend:**</u>
People:
LP = Lead Partner; **PC** = Project Coordinator; **PR** = Partner Representative; **LP/FM** = Lead Partner Financial Mana
Regional Coordinator; **RS** = Regional Stakeholder; **XRS** = Extended Regional Stakeholder; **R**E = Regional Exp
national funding; European School, etc); **JTS** = Joint Technical Secretariat

<u>Outputs/Meetings:</u>
RP = Reporting Period; **ProRe** = Progress Report; **FPR** = Final Programme Report; **OM** = Operation Manual; **P**
SC = Steering Committee (Meeting); **SC/RI** = Steering Committee/Regional Implementation (Meeting); **PA** = Pr
ERC = European Regional College (Conference); **R&D** = Research and Development

<u>Partners:</u>
P 2 = Edinburgh; **P 3** = Brno; **P 4** = Bratislava; **P 6** = Krakow; **P 7** = Sarajevo; **P 8** = Zagreb; **P 9** = Belgrade; **P**
P 11 = Calarasi (Learning Centre); **P 12** = Kiev; **P 13** = Schwerin (Ministry); **P 14** = Greifswald (LISA).

Table 1: OVERVIEW OF OUTPUTS / ACTIVITIES

Component 1	Month	Outputs / Activity	Start D	
	Jul-Dec	1st Steering Committee (SC) Meeting (13 PR) & 13 FM; (2 days) in Vienna; 1 Steering Committee (SC) Meeting Minutes; first draft of the Operations Manual and design of the Homepage	22	
	Dec	LP/FM sends all finance-relevant information and documentation incl. regional budget-breakdowns to FM	07	
	Dec	LP sends signed Subsidy Contract to JTS	07	
	Jul-Dec	1-4 day LP Consultation(s) can take place with individual partner institutions. If Consultations take place a Report will be compiled	22	
Component 2				
	Jul-Dec	Correspondence and liaison with Regional Stakeholders (RS)	22	
Component 3				
	Jul-Dec	Correspondence and liaison with Regional Coordinators (RC) and Regional Experts (RE) for Priority Areas	22	
Component 4				
	Jul-Dec	Correspondence and liaison with Regional Coordinators (RC) and Regional Experts (RE) for European Regional College Concept	22	
Component 5				
	Jul-Dec	Correspondence and liaison with Regional Coordinators (RC), Regional Stakeholders (RS) and Extended Regional Stakeholders (XRS) regarding preparation of publicity/information measures	22	

Component 1	Month	Outputs / Activity	Start D	
	Jan	Info about city/region & institute (incl. Photos) finalised	**01**	
	Jan	Dates for Workshops (Component 3), Conferences (Component 4) & Interim Conference (Component 5) finalised	**01**	
	Jan-Feb	ProRe 1 (Financial & Activity Report) prepared and submitted to JTS (Deadline 1.3.05)	**01**	
	Jan-Feb	PaAg signed by all partners; JTS informed	**31**	
	Feb	2nd Steering Committee Meeting (13 PR & 11 RC) (1 day) in Vienna; final version of Operation Manual (OM) (signed by PR); final version of the Publicity/Information Measures	**21**	
	Jan-Mar	Start-up Report sent to JTS	**31**	
	Jan-Jun	1-4 day LP Consultation(s) can take place with individual partner institutions. If Consultations take place a Report will be compiled	**01**	
Component 2				
	Jan-Feb	1) Regional Stocktaking Document (for RS) & 2) Annual Evaluation Feedback Form (for RS & XRS) finalised	**01**	
	Feb	1st Regional Implementation (RI) Meeting (13 PR & 11 RC & 11 RS = 35) (1 day): Regional Implementation Meeting Minutes (Delete - 11 Regional Stocktaking Documents (RS))	**22**	
Component 3				
	Jan-Feb	Input Forms for Component 3 (incl. Input for Best Practice Manual, R&D work & PA New Models Catalogue) finalised	**01**	
	Jan-Feb	1) PA Study Visit Registration Form, 2) PA Study Visit Study Visit Log Form & 3) PA Report Form finalised	**01**	

Component	Month	Outputs / Activity	Start D	
	May	Priority Areas Workshops 1-2 (1 LP, 1 PR, 1 RC, 11 RE per Workshop) (2 days); PA Workshop Minutes (including plans for R&D); First part of Best Practice Manual	**02**	
	May	PA Study Visits 1-3; 3 PA Study Visit Logs; 22 Priority Areas Reports (national language)	**03**	
Component 4				
	Jan-Feb	Input Forms for Component 4 (ERC Concept & R&D Work Plan) finalised	**01**	
	June	1st European Regional College (ERC) Conference (1 LP, 1 PR, 1RC, 11 RE, 1 EE) (2 days); ERC Conference Minutes; First framework of ERC Concept	**06**	
Component 5				
	Jan-Feb	Regional Activity Report Form (national language) finalised	**01**	
	May	1 international kick-off meeting. 11 Regional Activity Reports (in national language)	**24**	

REPORTING PERIOD 3: Jul - Dec 2005

Component 1	Month	Outputs / Activity	Start D	
	Jan-Feb	ProRe 2 (Financial & Activity Report) prepared and submitted to JTS (Deadline 1.3.06)	**01**	
	Oct	3rd Steering Committee (SC) Meeting (13 PR) (1 day) in Vienna; SC Meeting Minutes	**17**	
	Jul-Dec	1-4 day LP Consultation(s) can take place with individual partner institutions. If Consultations take place a Report will be compiled	**01**	
Component 2				
	Oct	2nd Regional Implementation (RI) Meeting (13 PR & 11 RS & 11 XRS = 35) (1 day): Regional Implementation Meeting Minutes; 11 Annual Evaluation Feedbacks	**18**	

Component 3				
	Sep	Priority Areas Workshops 3-4 (1 LP, 1 PR, 1 RC, 11 RE per Workshop) (2 days); PA Workshop Minutes (including plans for R&D); Second part of Best Practice Manual	**01**	
	Jul-Dec	PA Study Visits 1-1; 11 PA Study Visit Logs; 22 Priority Areas Reports (national language)	**01**	
Component 4				
	May	2nd European Regional College (ERC) Conference (1 LP, 1 PR, 1RC, 11 RE, 1 EE) (2 days); ERC Conference Minutes; Second framework of ERC Concept; First draft of proposals for EU and regional funding	**07**	
Component 5				
	Jul-Dec	Organisation of Regional Exchange Meetings: RC and RE meet with RS to discuss outcomes of Study Visits. 11 Regional Activity Reports (in national language)	**01**	

REPORTING PERIOD 4: Jan - Jun 2006

Component 1	**Month**	**Outputs / Activity**	**Start D**	
	Jan-Feb	ProRe 3 (Financial & Activity Report) prepared and submitted to JTS (Deadline 1.3.06)	**01**	
	Feb	4th Steering Committee (SC) Meeting (13 PR) (1 day) in Vienna; SC Meeting Minutes (including plans for Interim Conference)	**13**	
	Jan-Jun	1-4 day LP Consultation(s) can take place with individual partner institutions. If Consultations take place a Report will be compiled	**01**	
Component 2				
	Feb	3rd Regional Implementation (RI) Meeting (13 PR & 11 RS = 24) (1 day): Regional Implementation Meeting Minutes	**14**	
Component 3				

	May	Attendance at Interim Conference. Best Practice Manual of the Priority Areas containing an objective evaluation of the degree of efficiency the measures have on the social, economic and infrastructural stability of regions. Progress and result reports on R&D.	**29**	
	Jan-Jun	PA Study Visits 12-22; 11 PA Study Visit Logs; 11 Regional Activity Reports (in national language)	**01**	
Component 4				
	May	Attendance at Interim Conference; present the interim stage of the Concept including methods of implementation based on regional conditions, curricula and educational material with the emphasis on peace education and European citizenship). A set of proposals for EU and regional funding to implement such colleges at regional level will be presented; report on any existing regional developments towards the implementation of the ERC Concept	**29**	
Component 5				
	May	1 Interim Conference (2 LP & 13 PR & 11 RS & 33 XRS & 11 RC & 55 RE =1 EE (EU Funding) & 1 EE (European School) =127) (2 days); Interim Conference Minutes; EdGATE Report Interim; 11 Regional Activity Reports (in national language)	**29**	

Component 1	Month	Outputs / Activity	Start D	
	Jul-Aug	ProRe 4 (Financial & Activity Report) prepared and submitted to JTS (Deadline 1.9.06)	01	
	Oct	5th Steering Committee (SC) Meeting (13 PR) (1 day) in Vienna; SC Meeting Minutes	16	
	Jul-Dec	1-4 day LP Consultation(s) can take place with individual partner institutions. If Consultations take place a Report will be compiled	01	
Component 2				
	Oct	4th Regional Implementation (RI) Meeting (13 PR & 11 RS = 24) (1 day): Regional Implementation Meeting Minutes; 11 Annual Evaluation Feedbacks	17	
Component 3				
	Sep	Priority Areas Workshops 5-6 (1 LP, 1 PR, 1 RC, 11 RE per Workshop) (2 days); PA Workshop Minutes; First Part of Priority Areas New Models Catalogue	01	
	Jul-Dec	PA Study Visits 23-33; 11 PA Study Visit Logs; 22 Priority Areas Reports (national language)	01	
Component 4				
	Nov	3rd European Regional College (ERC) Conference (1 LP, 1 PR, 1RC, 11 RE, 1 EE) (2 days); ERC Conference Minutes; Third framework of ERC Concept; Second draft of possible proposals for EU and regional funding	06	
Component 5				
	Jul-Aug	Prepare Dissemination Seminars Report Input Forms	01	
	Jul-Dec	Regional Dissemination Seminars 1-5 (1 PR & 1 RC & 2 RE (1 each from components 3 & 4) & 1 RS & 3 XRS = 8) (1 day); 5 Regional Dissemination Seminar Reports; 5 regional press conferences; 11 Regional Activity Reports (in national language)	01	

Component 1	Month	Outputs / Activity	Start D	
	Jan-Feb	ProRe 5 (Financial & Activity Report) prepared and submitted to JTS (Deadline 1.3.06)	01	
	Jun	6th Steering Committee (SC) Meeting (13 PR) & 11 RC (1 day) in Vienna; SC Meeting Minutes (including plans for Final Conference)	11	
	Jan-Jun	1-4 day LP Consultation(s) can take place with individual partner institutions. If Consultations take place a Report will be compiled	01	
Component 2				
	Jun	5th Regional Implementation (RI) Meeting (13 PR & 11 RS & 11 RC & 1 EE (EU Funding) = 36) (1 day): Regional Implementation Meeting Minutes	12	
Component 3				
	Feb	Priority Areas Workshops 7-8 (1 LP, 1 PR, 1 RC, 11 RE per Workshop) (2 days); PA Workshop Minutes; Second Part of Priority Areas New Models Catalogue;	26	
	Jan-Apr	PA Study Visits 34-44; 11 PA Study Visit Logs; 11 Priority Areas Reports (national language)	01	
Component 4				
	Apr	4th European Regional College (ERC) Conference (1 LP, 1 PR, 1RC, 11 RE, 1 EE) (2 days); ERC Conference Minutes; Final ERC Concept; Final set of proposals for EU and regional funding	23	
Component 5				
	Jan-Jun	Regional Dissemination Seminars 6-10 (1 PR & 1 RC & 2 RE (1 each from components 3 & 4) & 1 RS & 3 XRS = 8) (1 day); 5 Regional Dissemination Seminar Reports; 5 regional press conferences; 11 Regional Activity Reports (in national language)	01	

Component 1	Month	Outputs / Activity	Start D	
	Jul-Aug	ProRe 6 (Financial & Activity Report) prepared and submitted to JTS (Deadline 1.9.06)	01	
	Oct	7th Steering Committee (SC) (13 PR) & 13 FM (1 day) Meeting in Vienna; SC Meeting Minutes	22	
	Jul-Nov	1-4 day LP Consultation(s) can take place with individual partner institutions. If Consultations take place a Report will be compiled	01	
	Dec-Jan	Final Programme Report (Financial & Activity Report) prepared and submitted to JTS	01	
Component 2				
	Oct	6th and final Regional Implementation (RI) Meeting (13 PR & 11 RS = 24) (1 day): Regional Implementation Meeting Minutes; 11 Annual Evaluation Feedbacks	23	
Component 3				
	Oct	Attendance at Final Conference; present the Priority Areas New Model Catalogue of Priority Areas: Equality in Education (EQE), Quality in Education (QE), Europe in Education; Vocation in Education (VE) /with sub-topics). In particular, it will be shown how these particular measures will contribute to the social, economic and infrastructural stability of a region	24	
Component 4				
	Oct	Attendance at the Final Conference; present the ERC Concept including methods of implementation based on regional conditions, curricula and educational material with the emphasis on peace education and European citizenship. Proposals for EU and regional funding to implement ERCs at regional level will be presented; highlight how the ERC Concept will improve the qualifications of regional workforces and at the same time increase and enhance mobility and cohesion by providing similar models of education in various regions in Europe. Any existing regional developments towards the implementation and realisation of the ERC Concept will also be presented	24	

Component 5				
	Oct	1 Final Conference (2 LP & 13 PR & 11 RS & 33 XRS & 11 RC & 55 RE =1 EE (EU Funding) & 1 EE (European School) =127) (1 day); EdGATE Report Final; 11 Regional Activity Reports (in national language)	**24**	

Table 2: DETAILED WORK SCHEDULE

REPORTING PERIOD 1: Jul - Dec 2004

Component 1	Month	Outputs	Activity	Responsibilty	Start	
	Jul-Nov	OM draft 1	Prepare first draft OM; send to PR	PC	22	
	Dec	SC Meeting 1	Discussion OM (organisational structure, information policy (homepage design), financial guidelines, time-plan, reporting procedures)	PC, LP/FM, PR, FM	06	
	Dec	SC Meeting 1 Minutes	Write SC Meeting 1 Minutes; send to PR	PC	08	
	Dec	FM Documentation	LP/FM sends all finance-relevant information and documentation incl. regional budget-breakdowns to FM	LP/FM	08	
	Dec	Subsidy Contract	LP signs and sends Subsidy Contract to JTS	LP		
	Jun-Dec	LP Consultation	1-4 day LP Consultation(s) can take place with individual partner institutions. If Consultations take place a Report will be compiled.	PC	22	

Component 1	Month	Outputs	Activity	Responsibilty	Start	
	Jan	ProRe 1 (Financial Report)	FM send e-mail to LP/FM regarding Financial Report	FM 2-4,6,13-14 (EU) / 7-12 (3rd Countries)	01.	
	Jan	OM draft 2	Prepare second draft of OM; send to PR	PC	07.	
	Jan	ProRe 1 (Financial Report)	LP/FM feedback to FM 2-4,6,13-14 (EU)	LP/FM	07.	
	Jan	ProRe 1 (Financial Report)	LP/FM & FM 2-4,6,13-14 (EU) send to auditors	LP/FM & FM 2-4,6,13-14 (EU)	11.	
	Jan	ProRe 1 (Financial Report)	LP/FM sends audited statements to LP auditor	LP/FM	12.	
	Jan	SC Meeting 2 Registration	PR register themselves & RC for SC Meeting 2 (21 Feb in Vienna) (cf. Registration Form) to LP	PR 2-14	01.	
	Jan	Homepage info	Info about city/region & institute (incl. Photos); send to LP	PR 2-14	01.	
	Jan	Dates for Components 3 & 4 & Interim Conference	PR nominate dates for Components 3 & 4 & Interim Conference	PR 2-4, 6, 13-14	01.	
	Jan	Partner Agreement	LP prepares PaAg for P 2-14; send to PR (PaAg must be signed and brought to SC Meeting 2 on 21.02.05; ProRe 1 can only be submitted to JTS after signing of PaAg)	PC	01.	
	Jan	ProRe 1 (Activity Report)	PR report to LP regarding activities in RP 1 for ProRe 1	PR 2-14	01.	
	Feb	OM Feedback	Feedback from PR to LP re. OM draft 2	PR 2-14	10.	

	Month	Outputs	Activity	Responsibilty	Start	
	Feb	SC Meeting 2 Draft Agenda	Prepare draft agenda of SC Meeting 2; send to PR & RC	PC	01.	
	Feb	Start translation of OM draft 2	If necessary amend OM draft 2; send to translators for start of translation	PC, translators	07.	
	Feb	Partner Agreement	PR 2-14 bring signed PaAg to SC Meeting 2 on 21.02.05 (must be signed before submission of ProRe 1)	PR 2-14	31.	
	Feb	SC Meeting 2	Discussion OM (organisational structure, information policy (homepage design), financial guidelines, time-plan, reporting procedures) in particular Overall Work Schedule and Responsibilities / Preparation for Components 3 & 4 / PaAg / Finalisation of concept for the Information/Publicity Measures	PC, PR, RC	21.	
	Feb	OM	PR sign OM (basis for the implementation of the operation)	PR	21.	
	Feb	Partner Agreement	LP informs JTS in writing that the PaAg has been signed (if required a copy will be sent to JTS)	LP		
	Feb	ProRe 1 (Activity & Financial Report)	LP sends ProRe 1 to JTS (Activity and Financial Report) (Deadline 1.3.05)	LP	01.	
	Mar	SC Meeting 2 Minutes	Write SC Meeting 2 minutes; send to PR, RC & RS	PC	22.	
	Mar	Start-up Report	Complete Start-up Report and send to JTS (within 3 months of Subsidy Contract coming into force i.e. from 12 Jan 2005)	PC	12.	
	Jan-Jun	LP Consultation	1-4 day LP Consultation(s) can take place with individual partner institutions. If Consultations take place a Report will be compiled.	PC	01.	

Component 2	Month	Outputs	Activity	Responsibilty	Start	
	Jan	SC/RI Meeting 1 Registration	PR register themselves & RS for SC/RI Meeting 1 (22 Feb in Vienna) (cf. Registration Form) to LP	PR 2-14	01.	

	Month	Outputs	Activity	Responsibilty	Start	
	Feb	Regional Stocktaking Document	Prepare Regional Stocktaking Document for Component 2 - to be discussed at SC/RI Meeting 1 with PR, RC & RS; send to PR, RC & RS	PC	**01.**	
	Feb	SC/RI Meeting 1 Draft Agenda	Prepare draft agenda of SC/RI Meeting 1; send to PR, RC & RS	PC	**01.**	
	Feb	SC/RI Meeting 1	Participants will report, discuss and evaluate operational output and its correlation to the needs and requirements of the regions involved. The Regional Stocktaking Document will also be discussed (will describe the particular structural needs of regions); also role of XRS will be discussed (XRS will be present at next SC/RI Meeting 2 on 18 Oct 2005 in Vienna).	PC, PR, RC & RS	**22.**	
	Mar	SC/RI Meeting 1 Minutes	Write SC/RI Meeting 1 minutes; send to PR, RC & RS	PC	**23.**	

Component 3	Month	Outputs	Activity	Responsibilty	Start	
	Feb	Input Forms for Component 3 (PA Best Practice Manual, R&D work plan & PA New Models Catalogue)	Prepare draft Input Forms for Component 3 (incl. input for Best Practice Manual, R&D work plan and Priority Areas New Models Catalogue) - to be discussed at SC Meeting 2 with PR and RC; send to PR & RC	PC	**01.**	
	Feb	PA Study Visit Registration Form	Prepare PA Study Visit Registration Form - to be discussed at SC Meeting 2 with PR and RC; send to PR & RC	PC	**01.**	
	Feb	PA Study Visit Log Form	Prepare PA Study Visit Log Form - to be discussed at SC Meeting 2 with PR and RC; send to PR & RC	PC	**01.**	
	Feb	Priority Areas Reports (national language).	Prepare PA Report form - to be discussed at SC Meeting 2 with PR and RC; send to PR & RC	PC	**01.**	

Mar	PA Workshops 1 & 2 Registration	RC registers 2 RE for PA Workshops 1 & 2 (Registration Form) to LP	RC 2-14	**22.**	
Mar	PA Workshops 1 & 2 Draft Agendas	Prepare draft agendas of PA Workshops 1 & 2; send to PC	PR 13-14	**22.**	
Apr	PA Workshops 1 & 2 Draft Agendas	PC send to RC & RE	PC	**26.**	
Apr	PA Workshops 1 & 2 Registration	PC sends registrations to PR 13-14 (who organise PA Workshops 1 & 2)	PC	**26.**	
May	Info form for Component 3	RC prepare with RE the Input Form for PA Workshops 1 & 2 (Best Practice Manual)	LP/RC & RC 2-14 & RE	**26.**	
May	PA Workshops 1 & 2	PA Workshops 1 & 2 in Schwerin (Priority areas: Equality in Education (EQE): (a) social inclusion, (b) gender mainstreaming; Quality in Education (QE): (c) quality assurance, (d) teacher education). Day 1: reports about measures in the regions in the above mentioned Priority Areas. Day 2: reports compiled into first part of Best Practice Manual.	LP, PR, RC & RE	**02.**	
May	PA Workshops 1 & 2 Minutes	1 RE from PA Workshop 1 and 1 RE from PA Workshop 2 write minutes (incl. plan for R&D work plan before PA Workshops 5 & 6); send to LP, RC, RE & RS	RE	**04.**	
Jun	PA Workshops 1 & 2 Best Practice Manual	1 RE from PA Workshop 1 and 1 RE from PA Workshop 2 compile first part of Best Practice Manual (= collection of presentations from the regions based on the Input Form for Component 3); send to LP, RC, RE & RS	RE	**04.**	
Jun	PA Study Visits 1-11	RE send list/details of planned PA Study Visits (re. PA Study Visit Registration Form) to PC, RC & RS	RE	**04.**	

	Month	Outputs	Activity	Responsibilty	Start	
	Jun	Priority Areas Reports (national language).	RE write PA Reports (re. PA Report form) in national language; send to LP, RC, RE & RS	RE	**04.**	

Component 4	Month	Outputs	Activity	Responsibilty	Start	
	Feb	Input Form for Component 4 (ERC Concept & R&D work plan)	Prepare Input Form for Component 4 - to be discussed at SC Meeting 2 with PR and RC; send to PR & RC	PC	**01.**	
	Mar	ERC Conference 1 Registration	RC registers 1 RE for ERC Conference 1 (Registration Form) to LP	RC 2-14	**22.**	
	Mar	ERC Conference 1 Draft Agenda	Prepare draft agenda of ERC Conference 1; send to PR & RC	PC	**22.**	
	Apr	ERC Conference 1 Registration	PC sends registrations to PR 4 (who organises ERC Conference 1) **DELETE THIS LINE**	PC	**26.**	
	Apr	ERC Conference 1 Draft Agenda	send to PR, RC, RE & EE	PC	**02.**	
	May	Input Form for Component 4	RC prepare with RE the Input Form for ERC Conference 1	LP/RC & RC 2-14 & RE	**02.**	

	Month	Outputs	Activity	Responsibilty	Start	
	May	ERC Conference 1	ERC Conference 1 in Vienna. RE will consider international and regional models and initiate the development process (input from External Expert (EE)). Day 1: Reports from the participants regarding the existing educational landscape of their region, highlighting specific qualifications the regional workforce requires. Descriptions of international and regional models being implemented in their regions will also be given. Day 2: Development of first framework of ERC Concept listing common denominator qualities for all the regions and possible models, which would meet these qualities.	LP, PR, RC, RE & EE	06.	
	Jun	ERC Conference 1 Minutes	1 RE from ERC Conference 1 writes minutes (incl. plan for R&D work before ERC Conference 2); send to LP, RC, RE, RS & EE	RE	07.	
	Jun	First framework of ERC Concept	1 RE from ERC Conference 1 compiles 1st Framework of ERC concept; send to LP, RC, RE, RS & EE	RE	07.	

Component 5	Month	Outputs	Activity	Responsibilty	Start	
	May	International kick-off meeting	Prepare and implement international kick-off meeting in Vienna	PC	24.	
	Jan-Jun	Regional Activity Reports	RC write Regional Activity Reports (in national language) describing the progress and activities of the operation for regional dissemination	RC	01.	

Component 1	Month	Outputs	Activity	Responsibilty	Star	
	Jul	ProRe 2 (Financial Report)	FM send e-mail to LP/FM regarding Financial Report	FM 2-4,6,13-14 (EU) / 7-12 (3rd Countries)	01	
	Jul	ProRe 2 (Financial Report)	LP/FM feedback to FM 2-4,6,13-14 (EU)	LP/FM	08	
	Jul	ProRe 2 (Financial Report)	LP/FM & FM 2-4,6,13-14 (EU) send to auditors	LP/FM & FM 2-4,6,13-14 (EU)	12	
	Jul	ProRe 2 (Financial Report)	LP/FM sends audited statements to LP auditor	LP/FM	13	
	Aug	ProRe 2 (Activity Report)	PR report to LP regarding activities in RP 2 for ProRe 2	PR 2-14	01	
	Aug	ProRe 2 (Activity & Financial Report)	LP sends ProRe 2 to JTS (Activity and Financial Report) (Deadline 1.9.05)	LP	01	
	Sep	SC Meeting 3 Registration	PR register themselves for SC Meeting 3 (17 Oct in Vienna) (cf. Registration Form) to LP	PR 2-14	01	
	Oct	SC Meeting 3 Draft Agenda	Prepare draft agenda of SC Meeting 3; send to PR	PC	01	

	Month	Outputs	Activity	Responsibilty	Star	
	Oct	SC Meeting 3	Monitor the progress of the operation as detailed in the second Progress Report for the period Jan – Jun 05. Consider the outcomes of the Priority Area (PA) workshops 1-2 in Schwerin and 3-4 in Brno as well as the first ERC Conference in Bratislava. Consider the first draft of the Best Practice Manual for Priority Areas: Equality in Education (EQE): (a) social inclusion, (b) gender mainstreaming; Quality in Education (QE): (c) quality assurance, (d) teacher education; Europe in Education (EE): (e) European dimension in education, (f) modern language tuition; vocation in education (VE): (g) vocational education; (h) ICT (e-inclusion) produced during the four workshops as well as the first framework of the ERC Concept produced during the first conference.	PC & PR	17	
	Nov	SC Meeting 3 Minutes	Write SC Meeting 3 minutes; send to PR, RC & RS	PC	18	
	Jul-Dec	LP Consultation	1-4 day LP Consultation(s) can take place with individual partner institutions. If Consultations take place a Report will be compiled.	PC	01	

Component 2	Month	Outputs	Activity	Responsibilty	Star	
	Sep	SC/RI Meeting 2 Registration	PR register themselves, RS & XRS for SC/RI Meeting 2 ((cf. Registration Form) to LP	PR 2-14	01	
	Oct	Annual Regional Evaluation Feedback Form	Prepare Annual Regional Feedback Form for Component 2 - to be discussed at SC/RI Meeting 2 with PR, RS & XRS; send to PR, RS & XRS	PC	01	
	Oct	SC/RI Meeting 2 Draft Agenda	Prepare draft agenda of SC/RI Meeting 2; send to PR, RS & XRS	PC	01	

	Oct	SC/RI Meeting 2	Report, discuss and evaluate operational output and its correlation to the needs and requirements of the regions involved. The Regional and Extended Regional Stakeholders (RS & XRS) will evaluate the feasibility of operational output for the needs of their regions.	PC, PR, RS & XRS	18	
	Oct/Nov	SC/RI Meeting 2 Minutes	Write SC/RI Meeting 1 minutes; send to PR, RS & XRS	PC	19	
	Dec	Annual Evaluation Feedbacks	11 Annual Evaluaton Feedbacks	RS	01	

Component 3	Month	Outputs	Activity	Responsibilty	Star	
	Jul	PA Workshops 3 & 4 Registration	RC registers 2 RE for PA Workshops 3 & 4 (Sep in Brno) (cf. Registration Form) to LP	RC 2-14	01	
	Jul	PA Workshops 3 & 4 Draft Agendas	Prepare draft agendas of PA Workshops 3 & 4; send to PC	PR 3	01	
	Aug	PA Workshops 3 & 4 Draft Agendas	send to RC & RE	PC	30	
	Aug	PA Workshops 3 & 4 Registration	PC sends registrations to PR 3 (who organises PA Workshops 3 & 4)	PC	30	
	Sep	Input Form for Component 3	RC prepare with RE the Input Form for PA Workshops 3 & 4	LP/RC & RC 2-14 & RE	29	

	Sep	PA Workshops 3 & 4	PA Workshops 3 & 4 in Brno (Priority areas: Europe in Education (EE): (e) European dimension, (f) modern language tuition; Vocation in Education (VE): (g) vocational education; (h) ICT (e-inclusion). Day 1: reports about measures in the regions in the above mentioned Priority Areas. Day 2: reports compiled into second part of Best Practice Manual.	LP, PR, RC & RE	01	
	Sep	PA Workshops 3 & 4 Minutes	1 RE from PA Workshop 3 and 1 RE from PA Workshop 4 write minutes (incl. plan for R&D work before PA Workshops 7 & 8); send to LP, RC & RS	RE	01	
	Oct	PA Workshops 3 & 4 Best Practice Manual	1 RE from PA Workshop 3 and 1 RE from PA Workshop 4 compile second part of Best Practice Manual (= collection of presentations from the regions based on Input Form for Component 3); send to LP, RC, RE & RS	RE	01	
	Jul-Dec	PA Study Visits 1-11	PA Study Visits 1-11 (re. PA Study Visit Registration Form)	RE	01	
	Jul-Dec	PA Study Visit Logs	RE complete PA Study Visit Logs (cf. RA Study Visit Log Form(; send to PC, RC, RE & RS	RE	01	
	Jul-Dec	PA Reports (national language)	RE compile PA Report in the national language (re. PA Report form); send to PC, RC, RE & RS	RE	01	

Component 4	Month	Outputs	Activity	Responsibilty	Star	
	Sep	ERC Conference 2 Registration	RC registers 1 RE for ERC Conference 2 (7-8 Nov in Krakow) (cf. Registration Form) to LP	RC 2-14	01	
	Sep	ERC Conference 2 Draft Agenda	Prepare draft agenda of ERC Conference 2; send to PC	PR 6	01	
	Oct	ERC Conference 2 Registration	PC sends registrations to PR 6 (who organises ERC Conference 2)	PC	08	

	Oct	ERC Conference 2 Draft Agenda	send to RC, RE & EE	PC	03	
	Nov	ERC Conference 2	ERC Conference 2 in Krakow. RE will continue to consider international and regional models; continue the development process (input from External Expert (EE)). Feedback from the partners will be discussed and integrated into the concept. A first draft of possible proposals for EU and regional funding will be produced. The exact format of the meeting will be finalised by the SC but could have the following form: Day 1: Editing of the draft of Concept to include feedback from the regions. Day 2: Further development of Concept including first draft of proposals for EU and regional funding to implement regional ERCs	LP, PR, RC, RE & EE	07	
	Dec	ERC Conference 2 Minutes	1 RE from ERC Conference 2 writes minutes (incl. plan for R&D work before ERC Conference 3); send to LP, RC, RE, RS & EE	RE	09	
	Dec	Second framework of ERC Concept; First draft of proposals for EU and regional funding	1 RE from ERC Conference 2 compiles 2nd Framework of ERC concept; First draft of proposals for EU and regional funding; send to LP, RC & RS	RE	09	

Component 5	Month	Outputs	Activity	Responsibilty	Star	
	Jul/Dec	Organisation of Regional Exchange Meetings	Organisation of Regional Exchange Meetings: RC and RE meet with RS to discuss outcomes of Study Visits.	LP/RC, RC 2-14; RE & RS	01	
	Jul/Dec	Regional Activity Reports	RC write Regional Activity Report (in national language) describing the progress and activities of the operation for regional dissemination; send to RE, RS and XRS.	LP/RC & RC 2-14	01	

Component 1	Month	Outputs	Activity	Responsibilty	Start	
	Jan	ProRe 3 (Financial Report)	FM send e-mail to LP/FM regarding Financial Report	FM 2-4,6,13-14 (EU) / 7-12 (3rd Countries)	01	
	Jan	ProRe 3 (Financial Report)	LP/FM feedback to FM 2-4,6,13-14 (EU)	LP/FM	09	
	Jan	ProRe 3 (Financial Report)	LP/FM & FM 2-4,6,13-14 (EU) send to auditors	LP/FM & FM 2-4,6,13-14 (EU)	12	
	Jan	SC Meeting 4 Registration	PR register themselves for SC Meeting 4 (13 Feb in Vienna) (cf. Registration Form) to LP	PR 2-14	01	
	Feb	ProRe 3 (Activity Report)	PR report to LP regarding activities in RP 3 for ProRe 3	PR 2-14	01	
	Feb	Interim Conference Registration Form	Prepare Interim Conference Registration Form; send to PR	PC	01	
	Feb	SC Meeting 4 Draft Agenda	Prepare draft agenda of SC Meeting 4; send to PR	PC	01	
	Feb	ProRe 3 (Financial Report)	LP/FM sends audited statements to LP auditor	LP/FM	13	

g	Feb	SC Meeting 4	Discuss preparation of the third Progress Report. Emphasis will be placed on the marketing of the operation. Continue to develop and implement the publicity/information measures of the operation. Monitor the progress of the operation, in particular the efficiency and outcomes of the second ERC Conference in Krakow (COMPONENT 4) and consider the second framework of the ERC concept produced during the second conference. Plan the Interim Conference in Edinburgh in May 06.	PC & PR	13	
	Feb	ProRe 3 (Activity & Financial Report)	LP sends ProRe 3 to JTS (Activity and Financial Report) (Deadline 1.3.06)	LP	01	
	Mar	SC Meeting 4 Minutes	Write SC Meeting 4 minutes (including plans for interim conference); send to PR, RC & RS	PC	14	
	Mar	Interim Conference Registration	PR registers themselves and RC for Interim Conference (29-30 May in Edinburgh) (cf. Interim Conference Registration Form) to LP	PR 2-14	28	
	Apr	Interim Conference Registration	PC sends registrations to PR 2 (who organises Interim Conference)	PC	01	
	Jan-Jun	LP Consultation	1-4 day LP Consultation(s) can take place with individual partner institutions. If Consultations take place a Report will be compiled.	PC	01	

Component 2	Month	Outputs	Activity	Responsibilty	Start	
	Jan	SC/RI Meeting 3 Registration	PR register themselves & RS for SC/RI Meeting 3 (14 Feb in Vienna) (cf. Registration Form) to LP	PR 2-14	01	
	Feb	SC/RI Meeting 3 Draft Agenda	Prepare draft agenda of SC/RI Meeting 3; send to PR & RS	PC	01	
	Feb	SC/RI Meeting 3	Continue to report, discuss and evaluate operational output and its correlation to the needs and requirements of the regions involved.	PC, PR & RS	14	

	Month	Outputs	Activity	Responsibilty	Start	
	Feb	SC/RI Meeting 3 Minutes	Write SC/RI Meeting 3 minutes; send to PR, RC, RS & XRS	PC	15	
	Mar	Interim Conference Registration	PR registers RS & XRS for Interim Conference (29-30 May in Edinburgh) (cf. Interim Conference Registration Form) to LP	PR 2-14	28	
	Apr	Interim Conference Registration	PC sends registrations to PR 2 (who organises Interim Conference)	PC	01	

Component 3	Month	Outputs	Activity	Responsibilty	Start	
	Mar	Interim Conference Registration	PR registers RE for Interim Conference (29-30 May in Edinburgh) (cf. Interim Conference Registration Form) to LP	PR 2-14	28	
	Apr	Interim Conference Registration	PC sends registrations to PR 2 (who organises Interim Conference)	PC	01	
	Apr	Best Practice Manual	Best Practice Manual of the Priority Areas, also containing an objective evaluation of the degree of effieciency the measures have on the social, economic and infrastructural stability of regions	PC, RC, RE 2-14	01	
	Apr	Progress and result reports on R&D	Progress and result reports on R&D		01	
	Jul-Dec	PA Study Visits 12-22	PA Study Visits 12-22 (cf. PA Study Visit Registration Form)	RE	01	
	Jul-Dec	PA Study Visit Logs	RE complete PA Study Visit Logs (cf. PA Study Log Visit Log Forms); send to PC, RC, RE & RS	RE	01	
	Jul-Dec	PA Reports (national language)	RE compile PA Report in the national language (cf. PA Report form); send to PC, RC, RE & RS	RE	01	

Component 4	Month	Outputs	Activity	Responsibilty	Start	

| | Mar | Interim Conference Registration | PR registers RE for Interim Conference (29-30 May in Edinburgh) (cf. Interim Conference Registration Form) to LP | PR 2-14 | 28 | |
| | Apr | Interim Conference Registration | PC sends registrations to PR 2 (who organises Interim Conference) | PC | 01 | |

Component 5	Month	Outputs	Activity	Responsibilty	Start	
	May	2-day Interim Conference in Edinburgh	All participants from Components 1, 2, 3 and 4 will report on the progress of the activities of the first operational period. Comp. 1: will report on the operation's effectiveness and efficiency of the implementation; Future PR strategies for the second half of the operation period will be delineated (Regional Dissemination Seminars, ongoing Homepage, publications and Final Conference). Comp. 2: will report on the ongoing evaluation and implementation of operational products at regional level. Comp. 3: will report on the results of Priority Areas Workshops 1-4, present Best Practice Manual and give a preview of forthcoming PA Workshops 5-8. Reports of Study Visits will be presented. Comp. 4 will present the Interim ERC concept and proposals for EU and regional funding. An EdGATE Report Interim will published in printed/electronic form and disseminated to a wider interested general public ('added value'').	PR 2	29	
	Jun	EdGATE Report Interim	PR 2 and LP will compile Interim Conference Minutes & EdGATE Report Interim	LP & PR 2	31	
	Jan-Jun	Organisation of Regional Exchange Meetings	Organisation of Regional Exchange Meetings: RC and RE meet with RS to discuss outcomes of Study Visits.	LP/RC, RC 2-14; RE & RS	31	
	Jan-Jun	Regional Activity Reports	RC write Regional Activity Report (in national language) describing the progress and activities of the operation for regional dissemination; send to RE, RS and XRS.	LP/RC & RC 2-14	31	

Component 1	Month	Outputs	Activity	Responsibilty	Start	
	Jul	ProRe 4 (Financial Report)	FM send e-mail to LP/FM regarding Financial Report	FM 2-4,6,13-14 (EU) / 7-12 (3rd Countries)	01.	
	Jul	ProRe 4 (Financial Report)	LP/FM feedback to FM 2-4,6,13-14 (EU)	LP/FM	08.	
	Jul	ProRe 4 (Financial Report)	LP/FM & FM 2-4,6,13-14 (EU) send to auditors	LP/FM & FM 2-4,6,13-14 (EU)	12.	
	Aug	ProRe 4 (Activity Report)	PR report to LP regarding activities in RP 4 for ProRe 4	PR 2-14	01.	
	Aug	ProRe 4 (Financial Report)	LP/FM sends audited statements to LP auditor	LP/FM	13.	
	Aug	SC Meeting 5 Registration	PR register themselves for SC Meeting 5 (16 Oct in Vienna) (cf. Registration Form) to LP	PR 2-14	01.	
	Aug	ProRe 4 (Activity & Financial Report)	LP sends ProRe 4 to JTS (Activity and Financial Report) (Deadline 1.9.06)	LP	10.	
	Oct	SC Meeting 5 Draft Agenda	Prepare draft agenda of SC Meeting 5; send to PR	PC	01.	

	Month	Outputs	Activity	Responsibilty	Start	
	Oct	SC Meeting 5	Monitor the progress of the operation as detailed in the fourth Progress Report in particular the efficiency and outcomes of the Interim Conference. Continue to develop and implement the information policy of the operation; in particular the results of the EdGATE Report Interim will be marketed ('added value'). Consider the outcomes of the Priority Areas (PA) Workshops 5-6 in Bratislava and the first part of the Priority Areas New Models Catalogue for the Priority Areas: Equality in Education (EQE): (a) social inclusion, (b) gender mainstreaming; Quality in Education (QE): (c) quality assurance, (d) teacher education. Consider the ensuing 10 Regional Dissemination Seminars in all of the partner regions (with the exception of Edinburgh (venue of the Interim Conference).	PC & PR	**16.**	
	Nov	SC Meeting 5 Minutes	Write SC Meeting 5 minutes; send to PR, RC & RS	PC	**17.**	
	Jul-Dec	LP Consultation	1-4 day LP Consultation(s) can take place with individual partner institutions. If Consultations take place a Report will be compiled.	PC	**01.**	

Component 2	Month	Outputs	Activity	Responsibilty	Start	
	Aug	SC/RI Meeting 4 Registration	PR register themselves & RS for SC/RI Meeting 4 (17 Oct in Vienna) (cf. Registration Form) to LP	PR 2-14	**01.**	
	Aug	SC/RI Meeting 4 Draft Agenda	Prepare draft agenda of SC/RI Meeting 4; send to PR & RS	PC	**01.**	
	Oct	SC/RI Meeting 4	Fourth one-day Regional Implementation (RI) Meeting: Continue to report, discuss and evaluate operational output and its correlation to the needs and requirements of the regions involved. The Regional and Extended Regional Stakeholders (RS & XRS) will evaluate the feasibility of operational output for the needs of their regions	PC, PR, RS	**17.**	

	Month	Outputs	Activity	Responsibilty	Start	
	Nov	SC/RI Meeting 4 Minutes	Write SC/RI Meeting 4 minutes; send to PR, RC & RS	PC	**18.**	
	Dec	Annual Evaluation Feedbacks	11 Annual Evaluation Feedbacks	RS	**01.**	

Component 3	Month	Outputs	Activity	Responsibilty	Start	
	Jul	PA Workshops 5 & 6 Registration	RC registers 2 RE for PA Workshops 5 & 6 (Sep in Bratislava) (cf. Registration Form) to LP	RC 2-14	**01.**	
	Jul	PA Workshops 5 & 6 Draft Agendas	Prepare draft agendas of PA Workshops 5 & 6; send to PC	PR 4	**01.**	
	Aug	PA Workshops 5 & 6 Draft Agendas	send to RC & RE	PC	**29.**	
	Aug	PA Workshops 5 & 6 Registration	PC sends registrations to PR 4 (who organises PA Workshops 5 & 6)	PC	**29.**	
	Sep	PA Workshops 5 & 6	PA: Equality in Education & Quality in Education (with sub-topics). Workshops 5-6, ideally involving the same participants, aim at, based on the Best Practice Manual, developing first part of Priority Areas New Models Catalogue, i.e. one new model combining all the best aspects from each Priority Area.	LP, PR, RC & RE	**01.**	
	Sep	PA Workshops 5 & 6 Minutes	1 RE from PA Workshop 5 and 1 RE from PA Workshop 6 write minutes; send to LP, RC, RE & RS	RE	**01.**	
	Oct	Priority Areas New Models Catalogue	1 RE from PA Workshop 5 and 1 RE from PA Workshop 6 compile first part of Priority Areas New Models Catalogue (= collection of presentations from the regions based on the Input Form for Component 3); send to LP, RC, RE & RS	RE	**01.**	

	Jul-Dec	PA Study Visits 23-33	PA Study Visits 23-33 (re. PA Study Visit Registration Form)	RE	01.	
	Jul-Dec	PA Study Visit Logs	RE complete PA Study Visit Logs /cf. PA Study Visit Log Form); send to PC, RC, RE & RS	RE	01.	
	Jul-Dec	PA Reports (national language)	RE compile PA Report in the national language (re. PA Report form); send to PC, RC, RE & RS	RE	01.	

Component 4	Month	Outputs	Activity	Responsibilty	Start	
	Jul	ERC Conference 3 Registration	RC registers 1 RE for ERC Conference 3 (6-7 Nov in Schwerin) (cf. Registration Form) to LP	RC 2-14	01.	
	Jul	ERC Conference 3 Draft Agenda	Prepare draft agenda of ERC Conference 3; send to PC	PR 13-14	01.	
	Oct	ERC Conference 3 Registration	PC sends registrations to PR 13-14 (who organise ERC Conference 3)	PC	02.	
	Oct	ERC Conference 3 Draft Agenda	send to RC, RE & EE	PC	02.	
	Nov	ERC Conference 3	Third 2-day ERC Conference in Schwerin in Nov 06. RE will continue to consider international and regional models; continue the development process (input from External Expert (EE)). Feedback from the partners will discussed and integrated into the concept. A third framework for the ERC Concept as well as a second draft of possible proposals for EU and regional funding will be produced. The exact format of the meeting will be finalised by the SC but could have the following form: Day 1: Editing of the draft of Concept to include feedback from the regions. Day 2: further development of Concept including second draft of proposals for EU and regional funding to implement regional ERCs	LP, PR, RC, RE & EE	06.	

Dec	ERC Conference 3 Minutes	1 RE from ERC Conference 3 writes minutes (incl. plan for R&D work before ERC Conference 4); send to LP, RC, RE, RS & EE	RE	**08.**	
Dec	Third framework of ERC Concept; Second draft of proposals for EU and regional funding	1 RE from ERC Conference 2 compiles 3rd Framework of ERC concept; Second draft of proposals for EU and regional funding; send to LP, PR, RC, RE, RS & EE	RE	**08.**	

Component 5	Month	Outputs	Activity	Responsibilty	Start	
	Aug	Dissemination Seminars Report Input Forms	Prepare Dissemination Seminars Report Input Forms; send to PR & RS	PC	**01.**	
	Jul-Dec	Organisation of Regional Exchange Meetings	Organisation of Regional Exchange Meetings: RC and RE meet with RS to discuss outcomes of Study Visits.	LP/RC, RC 2-14; RE & RS	**01.**	
	Jul-Dec	Regional Activity Reports	RC write Regional Activity Report (in national language) describing the progress and activities of the operation for regional dissemination; send to RE, RS and XRS.	LP/RC & RC 2-14	**01.**	

Oct-Dec	Dissemination Seminars 1-5	5 one-day Regional Dissemination Seminars (organised by RC): One participant each from Comp. 3-4 hold a meeting in their region to present EdGATE to a wider regional public (politicians/decision-makers, representatives from industry and commerce, the media, educational experts and a wider interested public). Exact format will be finalised by SC; suggested form: 1st Session – PR & RC present the operation/goals of the Structural Fund programme. RS presents regional implementation (RI). RE from Component 3 presents results of PA Workshops, highlighting correlation: educational measures/regional development. 2nd Session: RE from Comp. 4 presents Interim ERC concept/significance of regional implementation. Seminar closes with feedback/question session. EdGATE Report Interim will be distributed. Dissemination Seminar Reports will be compiled highlighting issues that were raised by the audience. Regional press conferences will be held.	LP/RC & RC 3-14	01.	
Oct-Dec	Dissemination Seminars Reports 1-5	RC writes Dissemination Seminars Reports 1-5; send to RE, RS and XRS.	LP/RC & RC 3-14	01.	
Oct-Dec	Regional Press Conferences	5 Regional Press conferences to be held	PR & RC 3-14	01.	

Component 1	Month	Outputs	Activity	Responsibilty	Start	
	Jan	ProRe 5 (Financial Report)	FM send e-mail to LP/FM regarding Financial Report	FM 2-4,6,13-14 (EU) / 7-12 (3rd Countries)	01	
	Jan	ProRe 5 (Financial Report)	LP/FM feedback to FM 2-4,6,13-14 (EU)	LP/FM	10	
	Jan	ProRe 5 (Financial Report)	LP/FM & FM 2-4,6,13-14 (EU) send to auditors	LP/FM & FM 2-4,6,13-14 (EU)	12	
	Feb	ProRe 5 (Activity Report)	PR report to LP regarding activities in RP 5 for ProRe 5	PR 2-14	01	
	Feb	ProRe 5 (Financial Report)	LP/FM sends audited statements to LP auditor	LP/FM	13	
	Feb	ProRe 5 (Activity & Financial Report)	LP sends ProRe 5 to JTS (Activity and Financial Report) (Deadline 1.3.07)	LP	01	
	May	SC Meeting 6 Registration	PR register themselves & RC for SC Meeting 6 (11 Jun in Vienna) (cf. Registration Form) to LP	PR 2-14	01	
	May	SC Meeting 6 Draft Agenda	Prepare draft agenda of SC Meeting 6; send to PR & RC	PC	01	

	Month	Outputs	Activity	Responsibilty	Start	
	Jun	SC Meeting 6	Continue to develop and implement the publicity/information measures. Monitor the progress of the operation in particular the efficiency and outcomes of the PA Workshops 7-8 in Krakow and the ERC Conferences 3 & 4 in Schwerin & Edinburgh. Consider the second and final part of the Priority Areas New Models Catalogue for the Priority Areas: Europe in Education (EE): (e) European dimension in education (f) modern language tuition; Vocation in Education (VE) (g) vocational education, (h) ICT (e-inclusion) and the final draft of the ERC Concept. Consider the outcomes of the Regional Dissemination Seminars. Plan the concept for the Final Conference in Vienna in Oct.	PC & PR	11	
	Jun	SC Meeting 6 Minutes	Write SC Meeting 6 minutes; send to PR, RC & RS	PC	12	
	Jan-Jun	LP Consultation	1-4 day LP Consultation(s) can take place with individual partner institutions. If Consultations take place a Report will be compiled.	PC	01	

Component 2	Month	Outputs	Activity	Responsibilty	Start	
	May	SC/RI Meeting 5 Registration	PR register themselves, RC & RS for SC/RI Meeting 5 (12 Jun in Vienna) (cf. Registration Form) to LP	PR 2-14	01	
	May	SC/RI Meeting 5 Registration	Prepare draft agenda of SC/RI Meeting 5; send to PR, RC & RS	PC	01	
	Jun	SC/RI Meeting 5 Registration	Participants will continue to report, discuss and evaluate operational output and its correlation to the needs and requirements of the regions involved. The Regional and Extended Regional Stakeholders (RS & XRS) will evaluate the feasibility of operational output for the needs of their regions. An External Expert (EU Funding) will attend this meeting to give input and an overview of possibilities for EU funding for the implementation of the operation's products at regional level.	PC, PR, RS, EE	12	
	Jun	SC/RI Meeting 5 Minutes	Write SC/RI Meeting 5 minutes; send to PR, RC, RS & EE	PC	13	

Component 3	Month	Outputs	Activity	Responsibilty	Start	
	Jan	PA Workshops 7 & 8 Registration	RC registers 2 RE for PA Workshops 7 & 8 (26-27 Feb in Krakow) (cf. Registration Form) to LP	RC 2-14	01	
	Jan	PA Workshops 7 & 8 Draft Agenda	Prepare draft agendas of PA Workshops 7 & 8; send to PC	PR 6	01	
	Jan	PA Workshops 7 & 8 Draft Agenda	send to RC & RE	PC	22	
	Jan	PA Workshops 7 & 8 Registration	PC sends registrations to PR 6 (who organises PA Workshops 7 & 8)	PC	22	
	Feb	PA Workshops 7 & 8	PA: Equality in Education & Quality in Education (with sub-topics). Workshops 5-6, ideally involving the same participants, aim at, based on the Best Practice Manual, developing first part of Priority Areas New Models Catalogue, i.e. one new model combining all the best aspects from each Priority Area	LP, PR, RC & RE	26	
	Mar	PA Workshops 7 & 8 Minutes	1 RE from PA Workshop 7 and 1 RE from PA Workshop 8 write minutes; send to LP, RC & RS	RE	28	
	Mar	Priority Areas New Models Catalogue	1 RE from PA Workshop 7 and 1 RE from PA Workshop 8 compile second part of Priority Areas New Models Cataloguel (= collection of presentations from the regions based on the Input Form for Component 3); send to LP, RC & RS	RE	28	
	Jan-Jun	PA Study Visits 34-44	PA Study Visits 34-44 (cf. PA Study Visit Registration Form)	RE	01	
	Jan-Jun	PA Study Visit Logs	RE complete PA Study Visit Logs (cf. PS Study Visit Log Form); send to PC, RC, RE & RS	RE	01	

	Month	Outputs	Activity	Responsibilty	Start	
	Jan-Jun	PA Reports (national language)	RE compile PA Report in the national language (re. PA Report form); send to PC, RC, RE & RS	RE	**01**	

Component 4	**Month**	**Outputs**	**Activity**	**Responsibilty**	**Start**	
	Mar	ERC Conference 4 Registration	RC registers 1 RE for ERC Conference 4 (23-24 Apr in Edinburgh) (cf. Registration Form) to LP	RC 2-14	**01**	
	Mar	ERC Conference 4 Draft Agenda	Prepare draft agenda of ERC Conference 4; send to PC	PR 2	**01**	
	Mar	ERC Conference 4 Registration	PC sends registrations to PR 2 (who organises ERC Conference 4)	PC	**01**	
	Mar	ERC Conference 4 Draft Agenda	send to RC, RE & EE	PC	**01**	
	Apr	ERC Conference 4	Fourth and final 2-day ERC Conference in Edinburgh in Apr 07. RE will continue to consider international and regional models; finalise the development process (input from External Expert (EE)). Feedback from the partners will discussed and integrated into the concept. Final version of ERC Concept as well as a final set of proposals for EU and regional funding will be produced. The exact format of the meeting will be finalised by the SC but could have the following form: Day 1: Editing of the draft of Concept to include feedback from the regions. Day 2: Finalisation of ERC Concept and set of proposals for EU and regional funding to implement regional ERCs.	LP, PR, RC, RE & EE	**23**	
	May	ERC Conference 4 Minutes	1 RE from ERC Conference 4 writes minutes; send to LP, RC, RE, RS & EE	RE	**25**	

	Month	Outputs	Activity	Responsibilty	Start	
	May	Final framework of ERC Concept; Final draft of proposals for EU and regional funding	1 RE from ERC Conference 4 compiles Final Framework of ERC concept; Final draft of proposals for EU and regional funding; send to LP, RC, RE, RS & EE	RE	**25**	

Component 5	Month	Outputs	Activity	Responsibilty	Start	
	Feb-Apr	Dissemination Seminars 6-10	5 one-day Regional Dissemination Seminars (organised by RC): One participant each from Comp. 3-4 hold a meeting in their region to present EdGATE to a wider regional public (politicians/decision-makers, representatives from industry and commerce, the media, educational experts and a wider interested public). Exact format will be finalised by SC; suggested form: 1st Session – PR & RC present the operation/goals of the Structural Fund programme. RS presents regional implementation (RI). RE from Component 3 presents results of PA Workshops, highlighting correlation: educational measures/regional development. 2nd Session: RE from Comp. 4 presents Interim ERC concept/significance of regional implementation. Seminar closes with feedback/question session. EdGATE Report Interim will be distributed. Dissemination Seminar Reports will be compiled highlighting issues that were raised by the audience. Regional press conferences will be held.	LP/RC & RC 3-14	**01**	
	Apr	Dissemination Seminars Reports 6-10	RC writes Dissemination Seminars Reports 6-10; send to RE, RS and XRS.	LP/RC & RC 3-14	**01**	
	Jan-Jun	Organisation of Regional Exchange Meetings	Organisation of Regional Exchange Meetings: RC and RE meet with RS to discuss outcomes of Study Visits.	LP/RC, RC 2-14; RE & RS	**01**	

Jan-Jun	Regional Activity Reports	RC write Regional Activity Report (in national language) describing the progress and activities of the operation for regional dissemination; send to RE, RS and XRS.	LP/RC & RC 2-14	01	

Component 1	Month	Outputs	Activity	Responsibilty	Start	
	Jul	ProRe 6 (Financial Report)	FM send e-mail to LP/FM regarding Financial Report	FM 2-4,6,13-14 (EU) / 7-12 (3rd Countries)	01	
	Jul	ProRe 6 (Financial Report)	LP/FM feedback to FM 2-4,6,13-14 (EU)	LP/FM	10	
	Jul	ProRe 6 (Financial Report)	LP/FM & FM 2-4,6,13-14 (EU) send to auditors	LP/FM & FM 2-4,6,13-14 (EU)	12	
	Jul	Final Conference Registration Form	Prepare Final Conference Registration Form; send to PR	PC	01	
	Aug	ProRe 6 (Activity Report)	PR report to LP regarding activities in RP 6 for ProRe 6	PR 2-14	01	
	Aug	ProRe 6 (Financial Report)	LP/FM sends audited statements to LP auditor	LP/FM	13	
	Aug	ProRe 6 (Activity & Financial Report)	LP sends ProRe 6 to JTS (Activity and Financial Report) (Deadline 1.9.07)	LP	31	
	Aug	Final Conference Registration	PR register themselves and RC for Final Conference (24 Oct in Vienna) (cf. Final Conference Registration Form) to LP	PR 2-14	01	
	Sep	SC Meeting 7 Registration	PR register themselves & FM for SC Meeting 7 (22 Oct in Vienna) (cf. Registration Form) to LP	PR 2-14	01	

	Oct	SC Meeting 7 Draft Agenda	Prepare draft agenda of SC Meeting 7; send to PR & FM	PC	**01**	
	Oct	SC Meeting 7	The seventh and final one-day Steering Committee (SC) meeting. Monitor the progress of the operation as detailed in the sixth Progress Report. Prepare the Final Programme Report for the EU Commission.	PC, PR & FM	**22**	
	Nov	SC Meeting 7 Minutes	Write SC Meeting 7 minutes; send to PR, RC, RS & FM	PC	**23**	
	Jul-Nov	LP Consultation	1-4 day LP Consultation(s) can take place with individual partner institutions. If Consultations take place a Report will be compiled.	PC	**01**	
	Dec	FPR (Financial Report)	FM send e-mail to LP/FM regarding Financial Report	FM 2-4,6,13-14 (EU) / 7-12 (3rd Countries)	**01**	
	Dec	FPR (Financial Report)	LP/FM feedback to FM 2-4,6,13-14 (EU)	LP/FM	**11**	
	Dec	FPR (Financial Report)	LP/FM & FM 2-4,6,13-14 (EU) send to auditors	LP/FM & FM 2-4,6,13-14 (EU)	**13**	
	Dec	FPR (Activity Report)	PR report to LP regarding activities in RP 7 for FÜR	PR 2-14	**01**	
	Dec	FPR (Financial Report)	LP/FM sends audited statements to LP auditor	LP/FM	**14**	
	Jan 08	FPR (Activity & Financial Report)	LP sends FPR to JTS (Activity and Financial Report)	LP	**01**	

Component 2	Month	Outputs	Activity	Responsibilty	Start	
	Aug	Final Conference Registration	PR register RS & XRS for Final Conference (24 Oct in Vienna) (cf. Final Conference Registration Form) to LP	PR 2-14	**01**	
	Sep	SC/RI Meeting 6 Registration	PR register themselves & RS for SC/RI Meeting 6 (23 Oct in Vienna) (cf. Registration Form) to LP	PR 2-14	**01**	

	Oct	SC/RI Meeting 6 Draft Agenda	Prepare draft agenda of SC/RI Meeting 6; send to PR & RS	PC	01	
	Oct	SC/RI Meeting 6	Sixth and final one-day SC/RI Meeting: Continue to report, discuss and evaluate operational output and its correlation to the needs and requirements of the regions involved. The Regional and Extended Regional Stakeholders (RS & XRS) will evaluate the feasibility of operational output for the needs of their regions.	PC & RS	23	
	Nov	SC/RI Meeting 6 Minutes	Write SC/RI Meeting 6 minutes; send to PR, RC, RS & XRS	PC	24	
	Dec	Annual Evaluation Feedbacks	11 Annual Evaluation Feedbacks	RS	01	

Component 3	Month	Outputs	Activity	Responsibilty	Start	
	Aug	Final Conference Registration	PR register RE for Final Conference (24 Oct in Vienna) (cf. Final Conference Registration Form) to LP	PR 2-14	01	

Component 4	Month	Outputs	Activity	Responsibilty	Start	
	Aug	Final Conference Registration	PR register RE for Final Conference (24 Oct in Vienna) (cf. Final Conference Registration Form) to LP	PR 2-14	01	

Component 5	Month	Outputs	Activity	Responsibilty	Start	

Oct	Final Conference	1-day Final Conference in Vienna will bring together all the operation participants for the last time. They will report on the results of the operation and present the final documentation: Priority Areas New Models Catalogue; Final ERC concept and a set of proposals for EU and regional funding. SC will give a review of the operation, in particular regarding its effectiveness in positively influencing and supporting the economic, social and infrastructural situations of the regions involved and supporting regional attempts to meet the Lisbon Goals/Knowledge Society. EdGATE Report Final will be compiled and made available not only in electronic but also in published form and disseminated to a wider interested general public ('added value'').	LP	24	
Oct	Regional Activity Reports	RC write Regional Activity Report (in national language)		01	
Nov	EdGATE Final Report	LP will compile EdGATE Final Report; send to PR, RC, RE, RS, XRS & EE	LP	01	

II. INFORMATION AND PUBLICITY MEASURES

11 OBLIGATIONS AND TASKS

LP and **PR** have the following **obligations and tasks** regarding information and publicity measures for the EdGATE operation:

"Inform general public about the role played by the Community in the assistance concerned and its results.
Increase public awareness and transparency regarding the regional policy activities of the EU.
Create a coherent picture of the assistance across all Member States involved.
Show programme funds are taken up and used as effectively as possible.
Convey reasons for funding and results achieved by the Structural Funds.
Inform about joint responsibility of the Union and MS, that they are working together and pooling their financial resources."
(From: Publicity Requirements for Approved Operations, Claus Schultze – JTS INTERREG IIIC East, Lead Partner Seminar, Vienna, 5 February 2004)

12 RESPONSIBILITIES

LP and **PR** have the following **responsibilities** regarding information and publicity measures for the EdGATE operation:

"Communication is clearly at the heart of any INTERREG IIIC operation not only for the above quoted obligations.
In particular since INTERREG IIIC projects are essentially based on exchange and dissemination of experience, including dissemination of activities and results to a wider European audience.
Proactive communication is clearly a prerequisite for any successful project implementation.
Overall responsibility for ensuring that these obligations are met on programme- as well as on project-level lies with the Managing Authority."
(From: Publicity Requirements for Approved Operations, Claus Schultze – JTS INTERREG IIIC East, Lead Partner Seminar, Vienna, 5 February 2004)

13 MONITORING

LP and **PR** have to **monitor** the information and publicity measures for the EdGATE operation:

"Therefore, communication will be part of your reporting duties, once your project is up and running.
In including communication activities in your project proposals you have demonstrated that you understand the importance the programme assigns to information and dissemination.
You will report about your related activities and results and send us, for instance: publicity plans, press releases, brochures, any other publications, published articles, reports about website development and updates as well as user statistics (hits), statistics on target audiences reached (e.g. through events or mailings), etc."
(From: Publicity Requirements for Approved Operations, Claus Schultze – JTS INTERREG IIIC East, Lead Partner Seminar, Vienna, 5 February 2004)

14 RULES

"**Publications** (such as booklets, leaflets and newsletters) about regional assistance part-financed by the Structural Funds <u>shall contain a clear indication on the title page of the European Union's participation and, where appropriate, that of the Fund concerned as well as the Community emblem</u> [...]"* This does <u>also</u> apply for electronic media (websites, databases) or audio-visual material !
„The organisers of **information events** such as conferences, seminars, fairs and exhibitions in connection with the implementation of operations part-financed by the Structural Funds <u>shall make the Community contribution to these assistance packages explicit by displaying the European flag in meeting rooms and using the Community emblem on documents</u>."
(From: Publicity Requirements for Approved Operations, Claus Schultze – JTS INTERREG IIIC East, Lead Partner Seminar, Vienna, 5 February 2004)

15 PUBLICITY REQUIREMENTS

LP and **PR** have to fulfil certain **publicity requirements** regarding information and publicity measures for the EdGATE operation:

"Any relevant project documentation should display on their title page:
- the INTERREG IIIC (main) logo
- the EU emblem including the text "Project part-financed by the European Union" (in English or any other official language)

Project websites should mention:
- the total EU contribution
- the percentage of this EU contribution
- and should contain a link to the INTERREG IIIC website and the INFOREGIO site."
(From: Publicity Requirements for Approved Operations, Claus Schultze – JTS INTERREG IIIC East, Lead Partner Seminar, Vienna, 5 February 2004)

16 EMBLEMS AND LOGOS

All public documentation has to display the following **emblems and logos**:
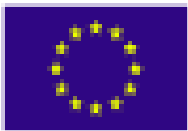
"Downloads of the different language versions of the EU Emblem are available at the INFOREGIO site: **http://europa.eu.int/comm/regional_policy/index_en.htm** (Go to: 'Information sources'/'Logos and Maps')"

"Download INTERREG IIIC <u>main</u> logo: **http://www.interreg3c.net** (Go to: 'Downloads'/'Logos, Forms, Screensaver')."

(From: Publicity Requirements for Approved Operations, Claus Schultze – JTS INTERREG IIIC East, Lead Partner Seminar, Vienna, 5 February 2004)

17 RELEVANT ACTIVITIES BY THE JTS

"Independently of your and your partners' joint efforts to inform your target groups and the general public about your operation, <u>the JTS will publish certain information about your operations, including your progress reports, on the INTERNET</u>. This is based on what is laid out in the subsidy contract and the partnership contracts.

There is basically two ways this information is published on our INTERNET site.
1. Automatic, in the form of a database ('General' pages)
2. Edited, in the form of a short portrait of your operation in the 'Operation Showcase' ('East' pages)."

(From: Publicity Requirements for Approved Operations, Claus Schultze – JTS INTERREG IIIC East, Lead Partner Seminar, Vienna, 5 February 2004)

III. LEGAL CONDITIONS

18 SUBSIDY CONTRACT

LP will sign a contract with the **JTS** called the Subsidy Contract. A model subsidy contract can be viewed at: http://www.interreg3c.net/sixcms/detail.php?id=4624 .

19 PARTNER AGREEMENT

All institutions involved in the EdGATE operation will sign a Partner Agreement with **LP**. The following is a sample of this contract. The Partner Agreement has to be signed before sending the first ERDF claim (Preparatory costs or Progress Report) i.e. **before 1 March 2005**.

19.1 Partner Agreement (Model)

This model Partner Agreement can be viewed at: http://www.interreg3c.net/sixcms/detail.php?id=4624. This model Agreement has been adated for the EdGATE Operation in following way:

INTERREG IIIC Operation

EdGATE

Index No. 3E0044I-B

Partner Agreement

**Amended Partner Agreement (Version: 23 July 2004) Download from
www.interreg3c.net**

Having regard to

- point 31, last sentence of the Communication from the Commission to the Member States of 28 April 2000 laying down guidelines for a Community initiative concerning trans-European cooperation intended to encourage harmonious and balanced development of the European territory - Interreg III (OJ C 143, 23.5.2000, p. 6; amended OJ C 239, 25.8.2001, p. 4) whereupon the partner in charge, i.e. the lead partner, will establish with the various partners in the operation, possibly in the form of an agreement, the division of mutual responsibilities, and

- point 37, last paragraph of the Communication from the Commission to the Member States of 7 May 2001 "INTERREGIONAL COOPERATION' Strand C of the Interreg III Community initiative (OJ C 141, 15.5.2001, p. 2) whereupon partners in an operation

funded under INTERREG IIIC should consider the benefits of concluding an agreement concerning their mutual financial and legal responsibilities, including the functions and responsibilities of the lead partner,

the following agreement shall be made between

European Office, Vienna Board of Education,
represented by SR Dr. Wolfgang Reiter (lead partner)

and

School of Education, University of Edinburgh,
represented by Mr Derek Waddell (partner 2),

Masaryk University in Brno, Faculty of Arts, Department of Educational Sciences,
represented by Mr Milan Pol and Mr Jan Pavlík (partner 3),

Faculty of Education, Comenius University, Bratislava,
represented by Prof. RNDr. Oto Majzlan, PhD. (partner 4),

Cracow Pedagogical University,
represented by Prof. dr. hab. Henryk Żaliński (partner 6),

Federal Ministry of Education and Science, Bosnia Herzegovina,
represented by Prof. Dr- Zijad Pašić (partner 7),

Office for Education and Sport, City of Zagreb,
represented by Mr Ivica Lazanja, B.Sc. (partner 8),

Department of Education, City Assembly of Belgrade,
represented by Ms Vesna Mirović Pjevač (partner 9),

School Inspectorate of the County of Calarasi,
represented by Mr Ion Cheşcă (partner 10),

Open & Distance Learning Centre, Calarasi,
represented by Mr Nicolae Micescu (partner 11),

Main Education and Science Board, Kiev City State Administration,
represented by Mr Boris Zhebrovskiy (partner 12),

Ministry of Education, Science and Cultural Affairs, Mecklenburg-West Pomerania,
represented by Mr Gerhard Bley (partner 13),

Institute for School and Further Education, Mecklenburg-West Pomerania,
represented by Ms Heidrun Breyer (partner 14),

for the implementation of the INTERREG IIIC operation 3E0044I-B EdGATE, approved by the Steering Committee of the Community initiative programme (CIP) "INTERREG IIIC East Zone " - on 5 November 2004 in Vienna.

§ 1
Subject of the agreement

1. Subject of this agreement is the organisation of a partnership in order to implement the INTERREG IIIC operation 3E0044I-B EdGATE as indicated in the annexes. The annexes comprise

    -   the application approved by the Steering Committee of the CIP "INTERREG IIIC East Zone" on 5 November 2004 in Vienna including enclosures **(Annex I)**,

    -   the subsidy contract between the managing authority of the CIP "INTERREG IIIC East Zone " and the lead partner dated 12 January 2005 **(Annex II)**.

2. The annexes - including all provisions they are based on and refer to - are considered to be an integral part of this agreement.

§ 2
Duration of the agreement

This agreement will enter into force retrospectively (ex tunc) from 5 November 2004 onward. It shall terminate on the date each of the partners receives its quota of the final payment by the EU Commission to the CIP "INTERREG IIIC East" according to Article 32(4) of Council Regulation (EC) No 1260/1999.

§ 3
Obligations

1. The lead partner and the partners commit themselves in doing everything in their power to foster the implementation of the operation as defined in § 1.

2. The lead partner shall fulfil all obligations arising from the subsidy contract and the approved application. In particular, the lead partner shall fulfil the following obligations:

    -   appoint a project manager who shall accept the operational responsibility for the implementation of the overall operation and a financial manager
    -   start and implement the operation according to the descriptions of individual components (Application Form, Annex 3) approved by the Steering Committee
    -   draw up and present progress reports comprising activity reports and audited financial reports to the joint technical secretariat of the CIP "INTERREG IIIC East Zone" on a regular basis, as well as the final report as defined in the subsidy contract
    -   request payments from the managing authority / paying authority of the CIP "INTERREG IIIC East Zone."
    -   receive payments from the paying authority of the CIP "INTERREG IIIC East Zone" and transfer portions of it to the partners as soon as possible
    -   manage and verify appropriate spending of the subsidy awarded
    -   carry out the operation's overall accounting
    -   communicate with the bodies implementing the CIP "INTERREG IIIC East Zone".
    -   react promptly to any request by the bodies implementing the CIP "INTERREG IIIC East Zone."

- notify its partners immediately of any event that could lead to a temporary or final discontinuation or any other deviation of the operation
- produce all documents required for the audit, provide necessary information and give access to its business premises
- retain at all times for audit purposes all files, documents and data about the part of the operation for which it is responsible on customary data storage media in a safe and orderly manner for a minimum of three years after the final payment by the EU Commission to the programme; other possibly longer statutory retention periods, as might be stated by national law, shall remain unaffected
- provide the independent assessors carrying out the INTERREG IIIC mid-term and ex-post evaluation any document or information necessary to assist with the evaluation
- comply with EU and national legislation.

3. Every partner shall accept the following duties and obligations:

- appoint a project leader for the parts of the operation for which it is responsible and give the project leader the authority to represent the partner in the operation
- implement the part of the operation for which it is responsible in due time according to the descriptions of individual components (Application Form, Annex 3) approved by the Steering Committee
- support the lead partner in drawing up progress reports and the final report by providing the required data on time
- produce and deliver to the lead partner all information necessary for payment requests
- notify the lead partner immediately of any event that could lead to a temporary or final discontinuation or any other deviation of the operation
- produce all documents required for the audit, provide necessary information and, for audit purposes, give access to its business premises
- retain at all times for audit purposes all files, documents and data about the part of the operation for which it is responsible on customary data storage media in a safe and orderly manner for a minimum of three years after the final payment by the EU Commission to the programme; other possibly longer statutory retention periods, as might be stated by national law, shall remain unaffected
- provide the independent assessors carrying out the INTERREG IIIC mid-term and ex-post evaluation any document or information necessary to assist with the evaluation
- respect all rules and obligations laid down in the subsidy contract and the co-financing statement each partner has signed for the application
- react promptly to any request by the bodies implementing the CIP "INTERREG IIIC East Zone."
- comply with EU and national legislation.

§ 4
Liability

1. Each partner, including the lead partner, shall be liable to the other partners and shall indemnify and hold harmless such other partners for and against any liabilities, damages and costs resulting from the non-compliance of its duties and obligations as set forth in this agreement and its annexes.

2. No party shall be held liable for not complying with obligations ensuing from this agreement in case of *force majeure*. In such a case, the partner involved must announce this immediately in writing to the other partners of the operation.

§ 5
Budgetary and financial management, accounting principles

1. The lead partner is the sole responsible party to the managing authority and the Steering Committee of the CIP "INTERREG IIIC East Zone" for the budgetary and financial management of the operation. The lead partner shall be responsible for the realisation and the transfer of payment claims to its partners as well as for an application for reallocation between budget lines as defined in the subsidy contract. For each financial claim, following payment of funds to the lead partner, the lead partner shall pay, as soon as possible, the sums assigned to each partner by bank transfer. No deduction, retention or further specific charge shall be made.

2. The lead partner must ensure the correctness of the accounting and financial reports and documents drawn up by the partners. The lead partner may request further information, documentation and evidence from the partners to that effect.

3. Every partner will be held responsible for its budget up to the amount as to which the partner participates in the operation and pledges to release its part of the co-funding.

4. Every partner commits to keeping separate accounts solely used for the operation as defined in § 1. The accounts shall provide for registration in Euros (EUR; €) of total expenses (expenditure) and of the return (income) related to the operation.

    Accounting reports or other documents, including copies of all pieces of evidence (invoices, documents related to tender, bank statements, etc.) shall be submitted to the lead partner or to the body appointed to that effect, in accordance with the schedule and requirements stipulated by the lead partner. The partners are obliged to have their accounting certified by an auditor independent of the operations' activities.

5. In default of evidence or in the event of non-fulfilment of the rules concerning eligibility of expenditure, the lead partner shall ask the partners to redraft the submitted financial documents. In case of repeated non-fulfilment, the lead partner shall be entitled to deny the expenditure declared by a partner. In that case, the lead partner is obliged to inform the partner concerned on the denial of the expenditure declared and the motivation thereto; also, the managing authority/joint technical secretariat of the CIP "INTERREG IIIC East Zone" shall be informed.

§ 6
Modification of the work plan and budget reallocation

1. Before applying for reallocation of total costs as stated in the approved application from one budget line to another in accordance with the subsidy contract, the lead partner shall obtain the approval of its partners.

2. Any request for amendment of the subsidy contract presented by the lead partner to the joint technical secretariat / managing authority of the CIP "INTERREG IIIC East Zone" shall be authorised by the partners of the operation beforehand.

§ 7
Reports

1. Every partner commits to providing the lead partner with the information needed to draw up progress reports and other specific documents required by the managing authority / joint technical secretariat of the CIP "INTERREG IIIC East Zone" or other bodies implementing the CIP. The reporting periods as laid down in the subsidy contract as well as instructions in the reporting forms shall be observed.

2. The lead partner shall systematically send every partner copies of the progress reports submitted to the managing authority / joint technical secretariat of the CIP "INTERREG IIIC East Zone" and keep the partners informed on a regular basis of all relevant communication with the bodies implementing the CIP.

§ 8
Information and publicity measures

1. The lead partner and the partners will implement jointly a communication plan that ensures adequate promotion of the operation both towards potential beneficiaries and towards the general public.

2. Any notice or publication by the operation, including at a conference or a seminar, must specify that the operation has received a subsidy from the funds of the CIP "INTERREG IIIC East Zone" Commission Regulation (EC) No 1159/2000 of 30 May 2000 on information and publicity measures to be carried out by the Member States concerning assistance from the Structural Funds must in any case be observed.

3. The partners agree that the managing authority / joint technical secretariat shall be authorised in the framework of the CIP "INTERREG IIIC East Zone" to publish, in whatever form and on or by whatever medium, including the Internet, the following information:

   - the name of the LP and its partners,
   - the purpose of the subsidy,
   - the amount granted and the proportion of the total cost of the operation accounted for by the funding,
   - the geographical location of the operation,
   - progress reports including the final report,
   - whether and how the operation has previously been publicised.

§ 9
Confidentiality

1. Although the nature of the implementation of the operation is public, part of the information exchanged in the context of its implementation between the lead partner and the partners, the partners themselves or bodies implementing the CIP can be confidential. Only documents and other elements explicitly provided with the statement "confidential" shall be regarded as such.

2. The lead partner and the partners commit to taking measures to ensure that all staff members carrying out the work respect the confidential nature of this information, and do not disseminate it, pass it on to third parties or use it without prior written consent of the lead partner and the partner institution that provided the information.

3. This confidentiality clause shall remain in force for two years following the termination of this agreement.

§ 10
Cooperation with third parties, delegation and outsourcing

1. In the event of cooperation with third parties, of the delegation of part of the activities or of outsourcing, the partners shall remain the sole responsible parties to the lead partner and through the latter to the bodies implementing the CIP concerning compliance with their obligations by virtue of the conditions set forth in this agreement including its annexes.

2. The lead partner shall be informed by the partners about the subject and party of any contract concluded with a third party.

§ 11
Assignment, legal succession

1. Neither the lead partner nor the partners are allowed to assign their duties and rights under this agreement without the prior consent of the other parties to this agreement.
    The parties to this agreement are aware of the provisions of the subsidy contract whereupon the lead partner is allowed to assign its duties and rights as laid down in the subsidy contract only after prior written consent of the managing authority and the Steering Committee of the CIP "INTERREG IIIC East Zone".

2. In the case of legal succession, the lead partner or the partner concerned is obliged to transfer all duties under this agreement to the legal successor.

§ 12
Non-fulfilment of obligations or delay

1. Every partner is obliged to promptly inform the lead partner and to provide the latter with all necessary details should there be events that could jeopardise the implementation of the operation.

2. Should one of the partners be in default, the lead partner shall admonish the respective partner to comply within a reasonable period of time, a maximum of one month. The lead partner shall make any effort to contact the partners in resolving the difficulties including seeking the assistance of the joint technical secretariat / the managing authority of the CIP "INTERREG IIIC East Zone".

3. Should the non-fulfilment of obligations continue, the lead partner may decide to exclude the partner concerned from the operation, with approval of the Steering Committee of the CIP "INTERREG IIIC East Zone". The joint technical secretariat / the managing authority of the CIP "INTERREG IIIC East Zone" shall be informed immediately if the lead partner intends to exclude a partner from the operation.

4. The excluded partner is obliged to refund to the lead partner any programme funds received which it cannot prove on the day of exclusion that they were used for the implementation of the operation according to the rules of eligibility of expenditure.

5. In case of non-fulfilment of a partner's obligation having financial consequences for the funding of the operation as a whole, the lead partner may demand compensation to cover the sum involved.

§ 13
Demand for repayment by the managing authority

Should the managing authority of the CIP "INTERREG IIIC East Zone" in accordance with the provisions of the subsidy contract demand repayment of subsidy already transferred, every partner is obliged to transfer its portion of the repayment amount to the lead partner. The lead partner shall, without delay, submit the letter by which the managing authority has asserted the repayment claim and notify every partner of the amount repayable. The repayment amount is due within two weeks following the notification by the lead partner. The amount repayable shall be subject to interest; the provisions of the subsidy contract shall apply by analogy.

§ 14
Disputes between partners

1. Should a dispute arise between partners of the operation, every partner shall be obliged to submit the dispute to the Steering Committee in order to reach a settlement.

2. The lead partner will inform the other partners and may, on its own initiative or upon request of a partner, ask the managing authority / joint technical secretariat of the CIP "INTERREG IIIC East Zone" for advice.

3. Should a compromise through mediation of the Steering Committee not be possible, every partner shall be obliged to request and accept arbitration carried out by an ad-hoc arbitration committee after having asked the managing authority / joint technical secretariat of the CIP "INTERREG IIIC East Zone" for advice through the lead partner. This will consist of eleven expert arbitrators of eleven different nationalities, one of which being the same as the partner involved in the dispute, appointed by the Steering Committee. If the Steering Committee has not appointed all the expert arbitrators within one month of the lead partner's request to it to decide on such appointment, the lead partner shall have the authority to appoint all eleven expert arbitrators. In the latter case, a designated member of the managing authority / joint technical secretariat will supervise the proceeding of the arbitration committee.

4. Every partner shall be obliged to accept and apply the decisions of the arbitration committee, subject to the applicable law hereby agreed upon and in compliance with the provisions of the Community law.

§ 15
Working languages

The working languages of the partnership shall be English. Any official internal document of the operation shall be made available in the language of the subsidy contract.

§ 16
Applicable law, translation languages

1. This agreement is governed by Austrian law [law of the country where the Lead Partner is located or law where the managing authority of the respective INTERREG IIIC programme is located].

2. In the event of translation of this agreement and its annexes, the English version shall prevail.

§ 17
Nullity

If any provision in this agreement should be wholly or partly ineffective, the parties to this agreement undertake to replace the ineffective provision by an effective provision which comes as close as possible to the purpose of the ineffective provision.

§ 18
Amendment of the agreement

1. This agreement shall only be amended in writing by means of an amendment to that effect signed by all parties involved.

2. Modifications to the operation (e.g. concerning time schedule or budget) that have been approved by the Steering Committee of the CIP "INTERREG IIIC East Zone" can be carried out without amending the agreement.

§ 19
Lapse of time

Legal proceedings concerning any issue ensuing from this agreement may not be lodged before the courts more than three years after the claim was constituted. In the event of legal proceedings concerning a claim to refund funds, a period of three years following the last transfer shall be applied.

§ 20
Domicile

1. To the effect of this agreement, the partners shall irrevocably choose domicile at the address stated in Annex 1 of the application form (Annex 1 to this agreement) where any official notifications can be lawfully served.

2. Any change of domicile shall be forwarded to the lead partner within 15 days following the change of address by registered mail.

INTERREG IIIC Operation

EdGATE

Index No. 3E0044I-B

Partner Agreement

Drawn up at Vienna.

<u>Lead partner</u>
European Office, Vienna Board of Education,
represented by SR Dr. Wolfgang Reiter

Signature: _____   Date: _____

<u>Partner 2</u>
School of Education, University of Edinburgh,
represented by Mr Derek Waddell

Signature: _____   Date: _____

<u>Partner 3</u>
Masaryk University in Brno, Faculty of Arts, Department of Educational Sciences,
represented by Mr Milan Pol and Mr Jan Pavlík

Signature: _____   Date: _____

<u>Partner 4</u>
Faculty of Education, Comenius University, Bratislava,
represented by Prof. RNDr. Oto Majzlan, PhD.

Signature: _____   Date: _____

INTERREG IIIC: EdGATE
_____ **97** / **119**

Lead Partner: European Office,   Phone + 43 1 52525 77085
Vienna Board of Education   Fax + 43 1 403 44 27
Auerspergstraße 15/32   office@edgate.eu.com
A-1080 Vienna, Austria   www.edgate.eu.com

Partner 6
Cracow Pedagogical University,
represented by Prof. dr. hab. Henryk Żaliński

Signature: _____ Date: _____

Partner 7
Federal Ministry of Education and Science, Bosnia Herzegovina,
represented by Prof. Dr- Zijad Pašić

Signature: _____ Date: _____

Partner 8
Office for Education and Sport, City of Zagreb,
represented by Mr Ivica Lazanja, B.Sc.

Signature: _____ Date: _____

Partner 9
Department of Education, City Assembly of Belgrade,
represented by Ms Vesna Mirović Pjevač

Signature: _____ Date: _____

Partner 10
School Inspectorate of the County of Calarasi,
represented by Mr Ion Cheşcă

Signature: _____ Date: _____

Partner 11
Open & Distance Learning Centre, Calarasi,
represented by Mr Nicolae Micescu

Signature: _____ Date: _____
Partner 12

**Main Education and Science Board, Kiev City State Administration,
represented by Mr Boris Zhebrovskiy**

Signature: _____ Date: _____

Partner 13
**Ministry of Education, Science and Cultural Affairs, Mecklenburg-West Pomerania,
represented by Mr Gerhard Bley**

Signature: _____ Date: _____

Partner 14
**Institute for School and Further Education, Mecklenburg-West Pomerania,
represented by Ms Heidrun Breyer**

Signature: _____ Date: _____

IV. FINANCES

20 EU Co-financing

The European Union Financing Programme funding the EdGATE-Project is called European Regional Development Fund (ERDF).

In financing programmes only costs, that have already been paid out by project partners get reimbursed – get paid back – by the EU. This is also referred to as EU-Cofinancing, which only EU Country Partners receive at a certain rate. The regular Co-financing rate for regions such as Bratislava, Edinburgh and Vienna is 50% of incurred costs. For Objective 1 regions such as Brno, Cracow and Schwerin the EU Co-financing amounts to 75% of project costs.

The remaining 50% resp. 25% of project costs have to be covered by national funding.

It is vital for the operation that all project costs related to the project including national costs for administration, rent of office space and equipment as well as staff costs are taken into the financial reports in order to receive a maximum of Co-financing.

NOTE: Funds are limited to the amount stated by every project partner in prior meetings. Co-financing beyond the stated and approved budget is not possible.

21 ELIGIBILITY OF EXPENDITURE

Costs that are covered by the European Union are referred to as "eligible".

In order to receive reimbursements for incurred costs, a number of aspects have to be considered:

♦ Costs **were paid out**! The **supporting documents** such as invoices and receipts are **filed** in the project partner's accounting system.

♦ The **expenditure** occurred in the course of the EdGATE project and is directly **related** to project activities.

♦ The amount paid for a certain good or service is **adequate** for the specific purpose of the project and all public **procurement procedures** have been observed and adhered to!! i.e. demanding three cost estimates from three independent providers for **all** services and goods before purchasing/buying them.

NOTE: EU guidelines are relevant for reporting and have to be complied to. If public procurement guidelines are <u>more specific and stricter</u> in your region though, they have priority!

It is vital for the operation that the relevant regulations are observed in particular those applying to the ERDF and public procurement on services, supplies and works.

These are:
- Directives 92/50/EEC,
- 93/36/EEC,
- 93/37/EEC and
- 93/38/EEC amended by 97/52/EC.

Further Regulations to be noted:
- Council Regulation

No 1260/1999/EC – on Structural Funds

- • Commission Regulations
- • No 1685/2000
- • No 448/2004 – Eligibility of expenditure
- • No 438/2001
- • No 2355/2002
- • No 448/2001– Management and control systems, Financial corrections
- • No 1159/2000 – on information and publicity measures: as well as **national rules** and regulation (national, regional, local level).

As a source of information regarding eligibility of expenditure the **Audit Guidelines** and the **INTERREG IIIC programme** manual can be referred to (were handed out in the course of the FM Seminar).

21.1 Eligible costs according to budget lines

In general all costs directly linked to the project, supported by all required documents allocated and booked into the correct budget lines are eligible and will be co-financed by 50% resp. 75%.

Those costs according to budget lines are:

♦ *Staff Costs*
Those are costs for employees working for the project. Eligible costs include salary, tax, employer's contribution for national social security schemes etc. They must all be calculated according to the national legislation based on regular employment contracts used in the partner institution. Staff costs can either consist of direct costs actually paid in cash by the operation or the value of work contributed to the project. In this case the rate of involvement of each staff member in the operation has to be stated as a rate, e.g. 50% of his/her time. The actual salary rate must be used. These costs must be justified on the basis of documents such as time sheets, record of tasks carried out, evidence of calculations for the determination of the value of staff time used for the operation.

♦ *Administration Costs*
All direct general costs such as office rent, mail, fax, phone, copying costs, consumables, etc. and indirect general costs such as overhead, which is related to the project activities. Overhead costs must be based on real costs and need to be calculated on a pro rata basis. The amount charged must be duly justified (fair and equitable method). Overhead costs linked to the services provided by external experts must be listed in the budget line "External expertise".

♦ *External expertise:*

In this budget line costs are charged, which are paid to external service providers. Those are based on and documented by contracts and invoices. External experts are sub-contracted to carry out certain tasks in the project (e.g. studies and surveys, translation, management or audit of the operation if sub-contracted, etc.). Public procurement rules must be observed in selecting a company or individual to provide external expertise. External expertise related to meetings and events, and promotion should not occur under external expertise but under the relevant budget lines.

♦ *Travel and accommodation costs for EU partners and for partners from third countries*

As a general rule, the most economic way of transport must be used. Daily allowances and accommodation costs must be set according to conditions for public authorities of the Member State. Travel and accommodation costs for partners from third countries, if these are to be financed from the operation's budget, must be paid, budgeted and accounted for by one of the EU partners.

Accommodation costs are eligible only during meetings, i.e. the number of nights funded by the ERDF corresponds to the number of days of a meeting or conference. E.g. meetings take place on Mondays and Tuesdays, only the accommodation from Sunday to Tuesday (2 nights) is eligible. Nights spent more than one day before a conference are ineligible.

Partners wishing to spend extra-nights before a conference or after a conference have to cover the costs out of private or institutional funds, not EU-funds.

♦ *Meetings and events*

In this budget line costs are accounted for that are related to the organisation of meetings (renting of locations, equipment, interpretation, printing, etc.). Those costs are eligible only if based on contracts with and invoices from external providers. Public procurement rules must be observed when selecting a company or service provider.

During meetings and events also costs for meals are eligible and have to be accounted for under this budget line.

As funds are limited rules regarding the funding of meals and beverages have to be respected:

- Evening of arrival:
  a meal and one drink are funded out of the EdGATE budget

- Meals during seminar days:
  Lunch and the full consummation of drinks will be funded as well a one to two coffee breaks per day. In the evening a buffet and one drink will be provided for participants. On the last day of a conference there will be no evening buffet.

NOTE: **Lists of attendance** have to be signed and attached to the invoices! The number of people present at a meeting has to match the number of participants having the meals.

Alcoholic drinks, tips, presents and flowers are ineligible! Hence demand invoices from service providers stating only "Meals and drinks for so and so many people" without giving too many details!

♦ *Promotion costs*

Costs for press releases, inserts in newspapers, leaflets, TV shows, brochures, newsletters and other publication costs not linked to specific events or seminars are put into this category. These costs have as well to be paid on the basis of the contracts and with invoices from the service providers. Public procurement rules must be observed!

♦ *Investments*

Costs for purchases, construction or repair works based on contracts and invoices are eligible. Investments will be financed from the INTERREG IIIC Programme only in duly justified cases and only if it is crucial for the project. The depreciation for the investments has to be charged on a pro rata basis according to national guidelines and only within project periods. This is only eligible if no other EU-funding has been used for the purchase (no double funding!!)

In the case of second-hand equipment, Rule No 4 of the Commission Regulation (EC) 1685/2000 amended by Commission Regulation (EC) No 448/2004 gives more details.

Public procurement rules have always got to be observed before purchasing investment (e.g. three cost estimates from three independent providers)

NOTE: No financial investments are allowed (e.g. bonds)! The costs for investments shall not exceed 15% of the ERDF contribution.

21.2 Eligibility rules in short

Based on the:
COMMISSION REGULATION (EC)
No 448/2004 of 10 March 2004
amending Regulation (EC) No 1685/2000 laying down detailed rules for the implementation of Council Regulation (EC) No 1260/1999 as regards the eligibility of expenditure of operations co-financed by the Structural Funds and withdrawing Regulation (EC) No 1145/2003
The following summary was put together:

- ➲ Rule No 1: Expenditure actually paid out
- ➲ Rule No 2: Accounting treatment of receipts
- ➲ Rule No 3: Financial & other charges and legal expenses
- ➲ Rule No 4: Purchase of second-hand equipment
- ➲ Rule No 5: Purchase of landRule No 6: Purchase of real estate
- ➲ Rule No 7: VAT and other taxes and charges
- ➲ Rule No 8: Venture capital and loan funds
- ➲ Rule No 9: Guarantee fundsRule No 10: Leasing
- ➲ Rule No 11: Costs incurred in managing and implementing the Structural Funds
- ➲ Rule No 12: Eligibility of operations depending on the location.

21.2.1 RULE No 1: Expenditure actually paid out

1. PAYMENT BY PROJECT PARTNERS
Payments by final beneficiaries/project partners shall be in the form of cash.

Depreciation, contributions in-kind (such as voluntary unpaid work) and overheads can also form part of the payments; however, the Structural Funds' co-financing is limited to 25% resp. 50%. In-kind contributions are limited to 2% of the project budget and add only to national co-financing. The question of eligibility of in-kind contribution needs to be worked on separately.

The cost of depreciation of real estate or equipment is eligible expenditure, provided that:
♦ There is direct link to the project
♦ Other EU or national funding have not been used for the purchase of such real estate or equipment (i.e. no double funding by different EU sources!)The depreciation cost is calculated in accordance with the relevant accountancy rules; (i.e. semi-annual or monthly depreciation on a pro-rata basis) and
♦ The cost relates exclusively to the period of co-financing of the operation in question.

In-kind contributions are eligible expenditure provided that:
♦ They consist in the provision of land or real state, equipment or materials, research or professional activity, or unpaid voluntary work;
♦ Their value can be independently assessed and audited;
♦ In the case of unpaid voluntary work, the value of the work is derived by calculating the hours of work times the hourly net wage, which is beyond the regular hourly wage without social security contribution

Overheads are eligible expenditure provided that they are based on real costs and are allocated pro rata to the operation according to a duly justified fair and equitable method.

NOTE: Member States may apply stricter national rules in the question of eligible expenditure!!
2. PROOF OF EXPENDITURE
As a general rule, for any payments taken, receipts and invoices have to be kept. Where this cannot be done, payments shall be supported by accounting documents of equivalent probative value.

3. SUBCONTRACTING
Subcontracting means to out-source certain project activities to external service providers. Such expenditure for subcontracting is ineligible if:
subcontracting adds to the costs of the project, without adding adequate value to it;
the payment for subcontracts with intermediaries is defined as a percentage of the total budget

For all subcontracts, subcontractors have to provide the auditor and control bodies with all necessary information relating to their subcontracted activities.**21.2.2 RULE No 2: Accounting treatment of receipts**
'Receipts' means invoices for sales, rentals, services, enrolment/fees or other equivalent receipts. Those support the payments made out of the project's budget.
Invoices have to be addressed to the project partners' institution and address in the following way:
EdGATE
Project partner's institution
c/o Partner Representative
Project partner's address

They have to be paid by the project partner directly. If expenses are covered by members of the project they have to hand in the invoice together with a request for reimbursement and all supporting documents to the project partner FM.

1. FINANCIAL CHARGES
Charges for transnational financial transactions are eligible for co-financing by the Structural Funds after deduction of interest received on the account.

2. BANK CHARGES ON ACCOUNTS
Bank charges for opening and administering the accounts of the project are eligible.

21.2.3 RULE No 3: Financial and other charges and legal expenses

1. LEGAL FEES FOR ADVICE, NOTARY FEES, THE COSTS OF TECHNICAL OR FINANCIAL EXPERTISE AND ACCOUNTANCY OR AUDIT COSTS
Legal fees for advice, notary fees, costs of technical or financial expertise and accountancy or audit costs are eligible if they are directly linked to the operation and are necessary for its preparation or implementation. Costs caused by requirements of the Managing Authorities are eligible as well.

Fines, financial penalties and expenses of litigation are ineligible.

21.2.4 RULE No 7: VAT and other taxes and charges
VAT IS ELIGIBLE IF IT CANNOT BE RECOVERED BY THE PROJECT PARTNER
21.2.5 RULE No 11: Costs incurred in managing and implementing the Structural
         Funds
4. EXPENDITURE BY PUBLIC ADMINISTRATIONS RELATING TO THE EXECUTION OF OPERATIONS
The expenditure of public administrations is eligible for co-financing if it relates to the execution of an operation provided that costs do not arise in the project partner's day-to-day tasks.

21.2.6 RULE No 12: Eligibility of operations depending on the location

1. GENERAL RULE
As a general rule, operations co-financed by the Structural Funds shall be within the European Union, in the region of the project partners.

21.3 Examples for non-eligible costs

Payments such as advance payments, payments before the start of the project, costs for luxury hotel or speeding fines are not eligible as well as tips, costs for presents and flowers.

22 AUDIT - SUPPORTING DOCUMENTS

Supporting documents are considered to proof the relation of a specific expenditure with the project activities and the actual delivery of products and services.
Documents must be held either as originals or on commonly accepted data carriers.

Documents must be held either as originals or on commonly accepted data carriers.

EC-Regulations to be noted:
Commission Regulation (EC) No. 438/2001 laying down detailed rules for the implementation of Council Regulation (EC) No. 1260/1999 as regards the management and control systems.
Commission Regulation (EC) No. 2355/2002 amending Commission Regulation (EC) No.438/2001.

Both regulations are available at: www.interreg3c.net/sixcms/detail.php?=286

23 STAFF COSTS

Supporting documents that have to be presented with the auditor to proof and justify expenditure are:

- A list of staff working on the project, stating name, qualification, function, percentage of work dedicated to the project and total salary
- For people working part-time: total salary, calculation of daily cost and total amount charged to the project
- Service order stating tasks to deliver and amount of days
- Payroll and social security documents
- Monthly time-sheet, properly filled-in and signed, both by the employee and the responsible

24 ADMINISTRATION COSTS

It is compulsory to state an explanation of the calculation method for charging a certain percentage to the operation.
According to **national practices** administration costs have to be charged by holding invoices, list of costs, and declaration of the amount or a combination of the prior.

25 EXTERNAL EXPERTISE

A contract explaining the type of task/activities to be developed, duration, remuneration and, if applicable, quota charged to the project has to be signed and presented to the auditor.
The invoice must clearly state the date of the invoice, the payee, the payer, and description of the services, quantification of the services, and price per unit and total price.
Where applicable, documents regarding social charges have to be presented.

Where applicable products from the expert (e.g. printouts, materials, books etc.) and evidence that public procurement has been respected need to be filed and presented with the auditor.

26 TRAVEL AND ACCOMODATION

A mission request/authorisation, clearly stating the name of the person, the date/duration of the mission, place and scope of the mission have to be filed with any travel invoices. The Travel invoices have to be paid directly by the company/institution.

The person undertaking the mission has to fill in a reimbursement request (special form!), with the relevant documentation required according to national rules or institutional procedures, and related to expenses incurred.

In the case of the use of a private car, a reimbursement request together with a mileage sheet according to national procedures and agreed values per travel unit have to be handed to the FM in order to receive reimbursement of incurred costs.

27 MEETINGS AND EVENTS

For the documentation in the budget line of **Meetings and Events** evidence has to be held that the cheapest option has been chosen and, if applicable, evidence that public procurement has been respected.

Contracts with the service provider clearly stating the type of service to be provided, the date of the service and the total cost have to be signed and filed. The detailed invoice has to state clearly the date of the invoice, the payee, the payer, a description of the services, the quantification of the services, the price per unit and the total price.

Other complementary documents are the agenda and/or the minutes of the meeting as well a list of participants.

28 PROMOTION COSTS

For the budget line **Promotion Costs** evidence has to be held that the cheapest option has been chosen and, if applicable, evidence that public procurement has been respected.

A contract with the service provider has to state clearly the type of service to be provided, the date of the service and the total cost. The detailed invoice has to contain the date of the invoice, the payee, the payer, description of the services, quantification of the services, price per unit and total price.

Other complementary documents have to be kept and presented such as copies of brochures, leaflets, newsletters, printed documents, and products achieved in the course of the promotion activity.

29 INVESTMENTS

29.1 InfrastructuresA contract with the service provider has to state clearly the type of service to be provided, the date of the service and the total cost. The detailed invoice has to contain the date of the invoice, the payee, the payer, description of the services, quantification of the services, price per unit and total price.

Other complementary documents have to be kept and presented such as copies of brochures, leaflets, newsletters, printed documents, and products achieved in the course of the promotion activity.

Evidence has to be presented that the cheapest option for the applied quality has been chosen.

The detailed invoice should clearly state the date of the invoice, the payee, the payer, and description of the goods, quantification of the goods, price per unit and the total price.

The depreciation method and amount charged in every payment request has to be reasonable and justified.

ALL NECESSARY DOCUMENTS REGARDING PROOF OF PAYMENT MUST BE FILED AND BE SUBMITTED TO THE AUDITOR AND THE LEAD PARTNER!!!

30 ACCOUNTING PROCEDURE

It is strongly recommended that specific forms are developed. One form should be attached to every invoice and signed by the partner representative as stated in the application form (see model form). As all invoices have to be paid by the project partner, individual project officers who advance money, have to fill in and sign a form requesting reimbursement from the project partner.

All documents have to be attached to the invoice in question to ensure the justification. After collecting all documents and **determining eligibility**, the form for the approval of the expenditure should be signed by the partner representative. Then the costs are booked into a separate system and separate account dedicated only to the EdGATE project **according to INTERREG IIIC budget lines**.

ADVICE: Check eligibility before booking costs into the accounting systems. Re-check at the end of the month i.e. the monthly settlement of accounts.

At the end of the project period i.e. 30 June, 31 December, the account entries are printed out and handed over to the auditor.

NOTE: TIME is CRITICAL and auditors need some time to fulfil their duty, so it is highly recommended to deliver all documents VERY early i.e. 7 July, 7 January at the auditing office.

As the Lead Partner is responsible for the project funding, we require the English account extract/listing per e-mail to the address sabine.lehner@cernet.at resp. sabine.lehner@edgate.eu.com **before** they are transferred to the auditor. In order to ensure that all percentage goals are met and the allocation of costs is in line with the approved budget, the extracts are ajusted resp. corrected by the Lead Partner and are sent back to the Project Partner to be forwarded to the auditor. The extracts have to contain the name of the payee, description of the expenditure (service/good delivered), reason for the expenditure, booking date, date of invoice, booking/receipt number, account number, the amount of money transferred, date of payment and the number of bank statement.

However, national requirements for the exact composition of printouts could be stricter.

As auditing by EU authorities (Second Level Control) is likely, all documents have to be kept until at least 2013.

Exchange rate

All expenditure will be accounted for in **national currency**.

For financial reporting, all costs have to be stated in **EURO**.

As was agreed by the FMs at SC 1 Meeting in Vienna (06-07.12.04), the conversion of foreign currency into EURO in the financial report will be done by using the average monthly

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rate set by the Commission referring to the month the invoice was paid. Please visit: http://europa.eu.int/comm/budget/inforeuro/en/catalog.htm
All EU Project partners **must use the chosen conversion method for the entire duration of the project**.

31 AUDITING PROCEDURE

It is compulsory that every project partner has his expenditure audited by an independent body (First Level Control – FLC). In some partner regions there is a centralized authority such as a Ministry fulfilling this task, in other regions private auditors have to be contracted.

NOTE: In the case of private auditors, public procurement has to be observed (three independent estimates, contract!)
(Contact an auditor and inform him/her about the amount of ERDF funding. He/she will give you a cost estimate. The most economic auditor will be chosen to carry out the auditing.)
In the EdGATE budget an amount of 3,5% of the ERDF funding is dedicated to cover the auditing expenditure. Not more than this amount can be spent for auditing.

In the Czech Republic, Slovakia, Poland and Germany there are centralized auditing authorities.

In Austria and Scotland private auditors have to be contracted.

The main aim of the audits is to check and confirm that all rules of the Interreg IIIC programme and EC regulations have been respected. The audits also provide a guarantee for the project partners and for the LP, that the operation's accounts comply with the legal and financial obligations of the national legislation. This is certified by the auditor's signature in the form "Confirmation by an independent auditor of a competent (public or private) body/unit".

The auditor checks the book keeping, the compliance to EC regulations and to the subsidy contract. All project partners have to have their accounts audited. After the completion of the audit statements, those have to be sent to the Lead Partner, who forwards those to the LP-auditor. He is the one to check the collect and check the formalities of the project partners' audits and sign the final LP-project audit. The financial report will be sent to the JTS together with the audit statements. Only if all required documentation is present, the expenditure will be reimbursed. The reimbursement is transferred into the account of the LP and from there forwarded to the accounts of the project partners

NOTE: The Lead partner has the right to object to costs charged to the operation if considered unjustified.
Hence the sending of the complete account extract/listing per e-mail to sabine.lehner@cernet.at resp. sabine.lehner@edgate.eu.com is required.

The audit statements have to be sent to the Lead Partner were all figures are put together in one spread sheet and given to the LP-auditor for a final statement and delivered to the JTS.

The Lead Partner is responsible for the correctness of accounts towards the Managing Authority and the Joint Technical Secretariat. The LP has to take care that the obligations stated in the subsidy contract are observed by all partners. Therefore partnership agreements are signed, stating the rights and obligations of all project partners.

The auditor and the auditing bodies are referred to as the First Level Control (FLC) checking the accounts. According to Management an Control systems laid down in the EC regulation 438/2001, 1447/2001, 2355/2002, 1260/1999, 1447/2001 Second Level Controls can be carried out by Member State authorities such as the Ministry of Finance.

The auditors have to be named in the subsidy contract.

NOTE: All official documents e.g. financial reports have to be signed by the partner representative as named in the application form.

32 REPORTING

In order to monitor and verifying the progress of a project, project partners have to produce and submit

♦ regular Progress Reports/Final Report
♦ Final Reports
♦ Internal two-monthly Reports

32.1 Progress Report (PR)

Regular submission of the PR is a pre-requisite for payment.

The PR consists of two reports:

♦ Activity Report
♦ Financial Report.

The PR includes information on the activities undertaken and expenditures incurred by all project partners in one document. It is submitted to the Joint Technical Secretariat (JTS) by the LP every six months.

The project periods are:

January-June (PR to be submitted on September 1st)
July-December (PR to be submitted on March 1st).

32.1.1 Activity Report

The Activity Report has to contain:

♦ General information on the operation's progress.
♦ A summary of the operation's activities so far.
♦ General progress of the operation regarding the set objectives and sub-objectives (using the indicators used for describing the expected effects).
♦ Status of the applications/parts of the operation funded from EU programmes for Third Countries.
♦ Status with the implementation of the parts of the operation funded from non-eligible funding sources.
♦ Publicity and information activities for promoting the operation's activities, results and achievements.
♦ Problems encountered and solutions found / proposed.
♦ Description of activities and outputs which have taken place during the reporting period.
♦ Deviations from the initial time plan.
♦ Reasons and justification for deviations.

32.1.2 Financial Report
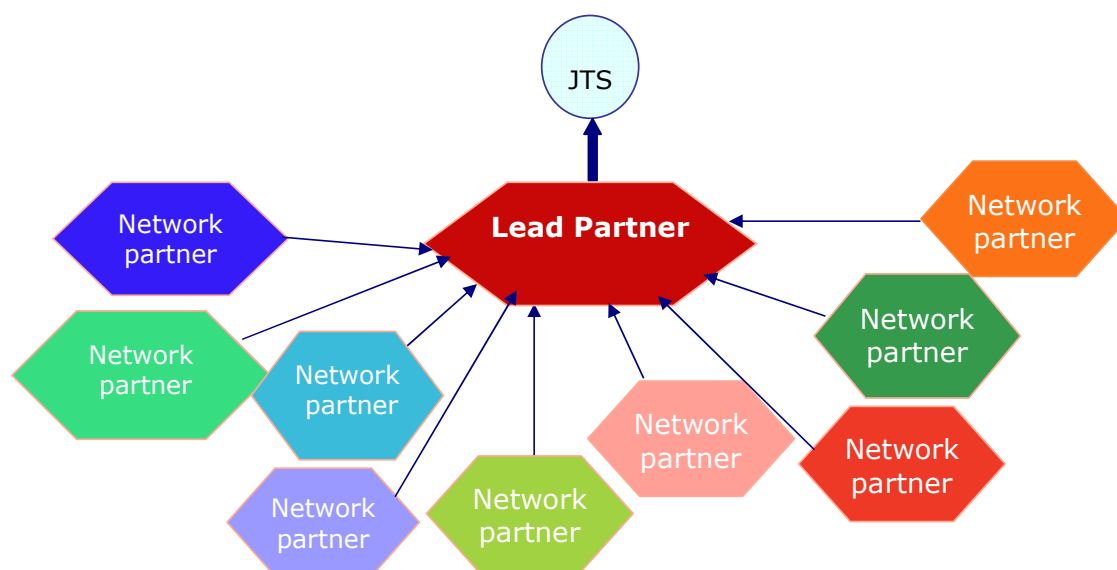
Overall allocated expenditures **per budget lines** (III.0).

0. Total eligible expenditure by budget line						

All costs in EUR.

Budget line Specification	Total Budget	Previously reported	Current Report	Accumulated	%	Remaining Budget
1 Staff costs	360.240,00	0,00	22.242,00	22.242,00	6,2%	337.998,00
2 Administration costs	198.560,00	0,00	5.095,00	5.095,00	2,6%	193.465,00
3 External expertise	438.000,00	0,00	0,00	0,00	0,0%	438.000,00
4 Travel and accommodation	126.800,00	0,00	8.183,00	8.183,00	6,5%	118.617,00
5 Meetings and events	137.462,50	0,00	2.200,00	2.200,00	1,6%	135.262,50
6 Promotion costs	138.937,50	0,00	0,00	0,00	0,0%	138.937,50
7 Other	10.000,00	0,00	0,00	0,00	0,0%	10.000,00
8 Investments	5.000,00	0,00	0,00	0,00	0,0%	5.000,00
9 Project funds (for RFOs only)	0,00	0,00	0,00	0,00	0,0%	0,00
10 Preparation Cost (view only)	10.000,00	0,00		0,00	0,0%	10.000,00
TOTAL	1.425.000,00	0,00	37.720,00	37.720,00	2,6%	1.387.280,00

Allocated expenditures per components and budget line (III.1).

1.Components' expenditure by budget line

1.1. Component 1

Management and Coordination

All costs in EUR.

Budget line Specification	Total Budget	Previously reported	Current Report	Accumulated	%	Remaining Budget
1 Staff costs	57.550,00	0,00	9.531,00	9.531,00	16,6%	48.019,00
2 Administration costs	15.137,50	0,00	2.498,00	2.498,00	16,5%	12.639,50
3 External expertise *	3.000,00	0,00	0,00	0,00	0,0%	3.000,00
4 Travel and accommodation	26.450,00	0,00	4.502,00	4.502,00	17,0%	21.948,00
5 Meetings and events	0,00	0,00		0,00	0,0%	0,00
6 Promotion costs	0,00	0,00		0,00	0,0%	0,00
7 Other *	3.000,00	0,00	0,00	0,00	0,0%	3.000,00
8 Investments *	0,00	0,00	0,00	0,00	0,0%	0,00
9 Project funds (for RFOs only) *	0,00	0,00	0,00	0,00	0,0%	0,00
Total	105.137,50	0,00	16.531,00	16.531,00	15,7%	88.606,50

III.1 Specification of budget line No 3 'External expertise'

Please provide information on "External expertise" costs paid during the current reporting period.

(maximum 1000 characters)

Component 1

Amount (EUR)

5. Confirmation by an independent auditor of a competent (public or private) body/unit

Based on our examination, we verify:
1. The general eligibility rules have been observed, including, but not limited to rules governing the eligibility of expenditure, in particular COM 1685/2000, amended by COM 1145/2003, rules described in Approval Letter and Subsidy Contract (including An

2. Receipts and payments are accurately recorded in the operation's accounting system, assets are correctly recorded and amounts are correctly reflected in demands for payment. The necessary audit trail exists for all activities, providing evidence in the

3. Services, supplies and works have been procured on the basis of proper call for tenders, sound controls have been exerted over the opening of the tenders and all tenders have been fully evaluated before the final decision has been made on service provi

4. Progress made has been fully and fairly reflected in the report. On the spot there is evidence that the reported activities have taken place, delivery of services and goods, and works are in progress or have been completed.

5. The partners have complied with Community rules on publicity, information, equal opportunities, protection of environment and any other Community policy.

6. All inputs for progress report received from partners were accompanied by independent auditor's verification.

7. The operation's activities have started and are implemented in accordance with the stipulations of § 5 (1) of the Subsidy Contract.

I hereby confirm that I / company is independent from the operation's activities and financial management.

5.1. Place, Date	
5.2. Auditor	
5.3. Signature	5.4. Official stamp

32.2 Principles for the Financial Report

As a basis for monitoring, activities and finance indicated in the reports should match those laid down in the AF. At any rate, all activities developed during the reporting period should be included in the activity report. Only **audited expenditure** can be included in the financial report. Further expenditure not audited because of delays in FLC must be presented in a separate document.

If problems arise with the First Level Control (FLC), a maximum delay for submitting the report is **1 month** - the JTS must be informed and agree beforehand.

After one month, reports must be sent without the missing audit certifications.

Amounts related to missing audit certifications must be included in the next Progress Report. Only in well justified cases, missing audit certifications might be accepted during in-between periods, always confirmed by the LP auditor.

NOTE: If audit statements and documents are not submitted in time, delays of payments are caused. All partners will encounter problems and will not receive their money in time.

TIME IS CRITICAL in INTERREG IIIC operations!!!

In case of underspending (not spending the whole amount stated in the application form), the shift of money not spent to the following period is subject to request.

Approval of shift will depend on the decision of the INTERREG IIIC Programme Steering Committee.

From March to September shifting should be approved, in the period from September to March shifting is more difficult.

Costs of activities in a Third Country are not included into the Financial Report!

NOTE: Continuous underspending might lead to loss of funds.

For the **Financial Report** specific forms have to be used, which were sent to the FMs in December 2004. A new reporting form is being developed by the Managing Authority, which has to be used and which will be forwarded to all FMs by the LP after receipt.

When completing the Financial Report ensure, that **only costs that have actually been paid out** are included in the Report.

For all reported costs, **invoices have to be available; costs cannot be estimated.** Especially for Staff and Administration Costs (rent, telephone, fax, internet, mail etc.) it is essential, that those costs are properely documented by **receipts** and by **proofs of payout** (**estimates are generally inacceptable**).

The best way to deal with Staff and Administration Costs is to have statements from your Accounting Department regarding the definite incurred costs. The use of blanket rates/composite rates, without any proof, is not allowed and will lead to a deletion by the Auditing Authority.

If explicit receipts for Administration Costs (rent, telephone, fax, internet, mail etc.) are unavailable, you may try to take overall receipts and break-down costs to a reasonable amount (e.g. 20% of work time dedicated to the project, 20% of telephone costs charged). **N.B. finally, your auditor will decide if costs charged in this way are acceptable!**

When completing the Financial Report, remember that in Administration, a lot of work and expenses are actually dedicated to **Promotion**. **Hence 50% of costs accounted for Administration** in your accounting system will be **charged under** the budget line **Promotion** in the Financial Report.

It is also important to note, that the EdGATE project is broken down into **<u>five</u>** components. Almost every expense is content-wise related to several or to all components. Therefore, do not forget to allocate and divide up costs to the relevant components!

For Administration 50'% of Administration Costs go into Promotion; 50% into Administration! These costs have to be allocated in the **budget line: Administration and Promotion** by the following percentages:

	Comp. 1	Comp. 2	Comp. 3	Comp. 4	Comp. 5
	30%	10%	30%	15%	15%

For the allocation of Staff Costs the following percentages apply:

	Comp. 1	Comp. 2	Comp. 3	Comp. 4	Comp. 5
Bratislava:	30%	10%	30%	15%	15%
Brno:	30%	10%	30%	15%	15%
Edinburgh:	25%	10%	10%	30%	25%
Schwerin/ Greifswald:	25%	10%	30%	20%	15%
Cracow:	25%	10%	30%	30%	5%

32.3. Internal two-monthly Report

In order to monitor the development of the budget and allocation of finances as well as ensuring the punctual delivery of the Financial Reports, internal two-monthly Reports are required by the Lead Partner.

The two-monthly Report has to be submitted by the **15th of the month following** i.e. the Report covering January to February has to be submitted by 15 March.

All intenal two-monthly Reports are completed in the same form and add to the project spendings.

At the end of the period, a completely compiled report is sent to the LP according to the time schedule resp. at the 15 of the month, that follows the end of the project period at the latest.

33 OVERSPENDING AND REALLOCATION

When doing the financial report the LP may deviate from the original amount in the budget line, the component budget and the budget of partners. The deviation is limited to a maximum of € 20.000, or – if more - up to 10% of the original amount.

NOTE: A deviation always takes into account the original budget – it is not possible to added further changes.
THEREFORE always try to keep to the budget lines and costs as stated in the AF!!!
When doing the financial report SHIFTING is vital to match the figures in the approved budget!

Only once during the operation period is the LP entitled to REALLOCATE/CHANGE amounts between budget lines, components and partners from the same objective area up to 20% of the original budget line, component budget and partner budget as stated in the approved application documents (annex IV). Such reallocation requires and application to the Managing Authority (MA)/JTS. It will enter into force only after approval of the MA/JTS.

34 MANAGEMENT OF COMMON COSTS

Some costs activities for the benefit of all project partners have to be carried out of the budget of one project partner (e.g. costs for management, reporting, external expertise, invitations of Third Country Partners). Therefore it must be agreed that the financing of these costs shall be divided among all partners.
These arrangements will be clearly stated in the Partnership Agreement.

34.1 Principles

If costs are shared among partners, the following principles have to be kept in mind:
♦ It is incompatible to be at the same time partner and subcontractor in an operation.
♦ It is impossible to gain profits from the participation in a project.
♦ The project partners are obliged to obtain the services by applying transparency and competition principles and respecting EU and national legislation on public procurement.
♦ The costs should be shared among partners according to a transparent, fair and equitable method.

34.2 Practical implementation

♦ The expenditure to be shared must be well identified in the accountancy of the project partner.
♦ At the end of each reporting period, the LP calculates each partner's share according to the method stipulated in the partnership agreement.
♦ The project partner in question requests the reimbursement of expenditure to each partner indicating the amount of expenditure corresponding to each partner's share.
♦ The partner's share is reported as the partner's expenditure in the Progress Report.
♦ It is the LP who includes the requested amount for reimbursement as the partner's contribution in the Financial Report.

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- After payment by the Paying Authority, the LP withholds the share of common costs from the payment due to each single partner and forwards the corresponding cost contributions of all partners to the partner in question who incurred the costs.

35 CHECKLIST FOR AUDITORS

Example checklist for auditing the Progress Report (based on INTERREG IIIC Audit Guidelines)

Checks	Yes No N/A	Audited by	Worksheet ref.
1. Are specific accounts kept for the operation, linked in with the accounts of the LP?			
2. Is there an internal control system reasonably capable of guaranteeing that the operation is complying with the legal and financial obligations (cf. 438/2001, amended by Commission Regulation (EC) No 2355/2002)?			
3. Are there any mechanisms for avoiding more than one request being made for Community assistance for the same expenditure/operation?			
4. Does the breakdown of total expenditure at the date of progress report (e.g. 30 June or 31 December) or at the date of the final report by category of expenditure (budget line) and by work packages: (a) Correspond to a correct attribution of expenditure? (b) Include only paid expenditure? Indicate the % found in sampling of unpaid expenditure or expenditure without a supporting document proving payment? (c) Remain within the limits of expenditure budgeted in the latest budget approved by the MA/SC?			
5. Has the correct exchange rate been used for converting expenditure made in national currency into Euros? Which model for calculating the exchange rate has been used?			

6. Have any possible major modifications to the budget been formally requested of the MA/SC, in writing, before the thresholds have been exceeded?			
7. Further to the checks made on the accounting documents, is all the expenditure included in the statement of expenditure eligible? In particular: (a) Has all expenditure incurred before the date of approval by the Steering Committee (with the exception of preparation costs) or after the approved end date of the operation been excluded? (b) Has expenditure with no supporting document proving payment been excluded? (c) Is every item of expenditure directly linked to the operation? (d) Has any expenditure been considered ineligible? If so, please indicate the % found in sampling of ineligible expenditure or items of expenditure with no supporting document. (e) Have the ceiling limits set for certain categories of expenditure been respected? (f) Are staff cost justified at actual cost? Is it evidenced by timesheets for employees working part-time on the operation? (g) Is indirect general cost allocation basis transparent and justifiable? (h) In case of voluntary work, are the valuation conditions satisfied? Are the travel and subsistence expenses for third country partners or participants related to the events taking place in the EU territory?			
8. Have the public procurement rules of the country concerned and of the European Union been respected?			

9. Is operation income correctly entered into the accounts?			
10. Have the country specific requirements for the eligible period of expenditure and for the financial control been followed?			

36 TIME SCHEDULE

	Accounting documents submitted to auditor and LP	Audit statement submitted to LP
Progress Report 1	**7.1.05** e-mail to LP/FM **11.1.05** back to FM 2-14 **12.1.05** submit to auditor	**7.2.05** sending of audit statements to LP/FM
Progress Report 2	**8.7.05** e-mail to LP/FM **12.7.05** back to FM 2-14 **13.7.05** submit to auditor	**8.8.05** sending of audit statements to LP/FM
Progress Report 3	**9.1.06** e-mail to LP/FM **12.1.06** back to FM 2-14 **13.1.06** submit to auditor	**9.2.06** sending of audit statements to LP/FM
Progress Report 4	**7.7.06** e-mail to LP/FM **12.7.06** back to FM 2-14 **13.7.06** submit to auditor	**10.8.06** sending of audit statements to LP/FM
Progress Report 5	**9.1.07** e-mail to LP/FM **12.1.07** back to FM 2-14 **13.1.07** submit to auditor	**9.2.07** sending of audit statements to LP/FM
Progress Report 6	**9.7.07** e-mail an LP/FM **12.7.07** back to FM 2-14 **13.7.07** submit to auditor	**10.8.07** sending of audit statements to LP/FM
Final Report	**10.12.07** e-mail to LP/FM **13.12.07** back to FM 2-14 **14.12.07** submit to auditor	**11.1.08** sending of audit statements to LP/FM