ECORYS

Study on Maximising the Potential of Mobility in Building European Identity and Promoting Civic Participation

Final Report
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Executive Summary

Introduction

ECORYS was commissioned by the European Commission's Education, Audiovisual & Culture Executive Agency and DG Communication to carry out a study on *'Maximising the Potential of Mobility in Building European Identity and Promoting Civic Participation in EU',* with the general objective of deepening understanding of how the potential to support civil society mobility offered by the Europe for Citizens programme and how that potential can be enhanced and fully exploited.

The study critically reviewed existing practice, to inform an analysis of what steps could and should be taken to make trans-national civil society mobility more effective within the Europe for Citizens programme (and its possible successor), including taking account of lessons learned from the Programme's Innovative Actions component established in 2009. The study also considered the capacity of civil society actors to participate in any such scheme, including an assessment of the level of interest and need and potential synergies with other EU programmes. To inform the development of possible options, success factors derived from existing trans-national civil society mobility schemes were reviewed and any lessons learned from these were taken into account.

Research method

The core research questions used to address the study objective focused on:

Need/demand: *what problem or deficiency does any improved mobility scheme need to address, what evidence is there of need/demand for such schemes and which stakeholders, target groups etc. require support? Are there barriers which are preventing in a systematic way, participation by key types of organisation?*

Supply: *what types of organisations, intermediaries and other stakeholders might be in a position to provide the services and activities that are in demand? (this is the heart of the issue of the capacity and capability of civil society organisations to respond positively and on a sufficient scale to the challenge).*

Added value: *How can mobility schemes and their promoters and delivery agents target European level added value rather than simply augment national and bi-lateral efforts and avoid contributing to fragmentation and duplication?*

Models/mechanisms: *what examples can be identified that demonstrate how the policy goals can be achieved if their successful elements are applied more widely?*

To build the evidence base needed to address these questions, a programme of research was carried which comprised: **Desk research** to gather and analyse evidence concerning the type and range of potential participants in any new mobility measure, and to assess the relevance of existing EU provision across a number of policy areas; **individual stakeholder consultations** to seek views on existing provision, provide qualitative insights into latent demand and possible barriers, and help frame the focus of the research and workshops; two **interactive workshop sessions** in Brussels, to firstly stimulate debate on strategic priorities, and then to help identify possible operational aspects of a new or extended

mobility scheme; and examination (through desk review, interviews and visits) of a series of **operational models** with the potential to provide transferable lessons for any new scheme.

Findings

In terms of **existing activities** the evidence indicates that although a range of opportunities to participate in mobility are available to civil society organisations (CSOs), current mechanisms do not meet their needs effectively – the Europe for Citizens programme makes a valuable contribution to promoting civic participation and building European identity, but mobility initiatives (in the sense of longer-term placements or exchanges aimed at providing practical experience), must compete for funding with operational support and wider project activity. The Innovative Actions component of Europe for Citizens has provided some useful lessons on how access to mobility might be improved.

In terms of **actors currently engaged** with the identity and citizenship agendas (organisations, sub-sectors, prominent issues or interests) most is known about EU-level organisations, since many are frequent participants in EU programmes, such as Europe for Citizens and indeed receive operational grants from the European Commission. We do know that a wide variety of organisations (not limited to NGOs) are active in promoting civil participation and building European identity, or have the potential to extend their activities from local/regional/national level to adopt a more trans-national outlook. This includes extensive networking and collaboration, partly since collaborative activity is an inherent part of most civil society focused activity.

In terms of **needs and resources** there appears to be a specific need for more opportunities for CSOs to take part in practical mobility activity that is accessible to a wider target group, and which goes beyond short-term movements (e.g. study visits, conferences, research projects). This would help organisations to build their own capacity (and that of the sector as a whole) with respect to European policy goals, and be sustainable in the longer term. The emphasis needs to be on 'learning by doing', i.e. exposing beneficiaries to the kind of practical experience that delivers significant value to organisations and individuals, and which triggers longer-term engagement with the EU. These sector needs are very relevant to overarching EU policy 'needs', in terms of mobilising the skills and experience of CSOs in moving forward the new Europe 2020 strategy. The widening of practical experience for CSOs through mobility could make a significant contribution to EU policy goals. However, to have an impact it will need to be of sufficient scale.

The level of **resources applied to mobility** by the EC is significant, notably in the education, culture and RTD sectors. This approach has been shown to have delivered benefits on a relatively large scale. Even though the civil society 'sector' may not be as cohesive as other sectors, this does not necessarily mean that some of the key principles of such schemes cannot be applied to maximise impact. A number of successful EU mobility schemes are characterised by a focus on practical experience, accompanied by comparatively straightforward procedures and in some cases simplified financial arrangements (use of flat-rate grants as a contribution towards expenses for example)[1]. Although clearly not directly transferable, such approaches do offer lessons concerning a cost-effective way to achieve the goal of maximising the potential of mobility through CSOs. The potential contribution from CSOs to meeting the

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[1] Examples include Erasmus (for students), Erasmus Mundus, Marie Curie, Erasmus for Young Entrepreneurs, as well as Erasmus for journalists and for trade unions (the latter supported under the Innovative Actions measure of the Europe for Citizens programme).

EUs policy goals is considerable, but compared with other sectors there are fewer mechanisms through which support for mobility can be systematically targeted and channelled.

In terms of **demand and capacity** there is evidence of strong demand for improved mobility schemes, and a significant gap in the provision of opportunities for placements or exchanges between CSOs, including from one level to another (EU, national, regional and local). Mobility that delivers practical experience can contribute strongly to building the capacity of civil society to engage with the EU policy agenda. The best way to implement this type of activity, on a sufficient scale and over a significant time-scale, is to offer a simple, systematic scheme which has low entry barriers and a flexible approach to thematic focus. While not all CSOs will have the capacity to respond to these opportunities, a sufficient number will do so to make it viable. The target sector will however need to be supported in terms of information and awareness raising and provision for small preparatory grants to assist in setting up mobility actions. The types of intermediate structures present in other sectors (universities, LLP national agencies, regional enterprise agencies etc.) are not always available to the civil society sector. Although there is clearly significant capacity within CSOs it is not always systematically linked, except perhaps at EU level.

The main **strategic** priority is to equip CSOs to better understand and engage in areas of policy making where **European Added Value** will be maximised, notably in terms of contributing to one of the EU's key policy priorities: engaging citizens, particularly in the context of Europe 2020. A distinctive and clearly identifiable learning mobility scheme would help to address this priority. It should emphasise practical experience ('learning by doing') - focusing on placements and exchanges - and be accessible to a wider target group (for example there is a particular need to involve more national, regional and local CSOs in learning mobility activities). In this context, the provision of a contact database to assist CSOs in partner matching for placements should be considered.

The evidence from existing mobility schemes suggests that initiatives that adopt a **systems-based**[2] **approach** have a greater chance of making an impact. Such an approach ensures an emphasis on practical mobility for more than very short-term periods, making richer and deeper knowledge exchange and long-term partnership building more likely. To ensure the **sustainability** of any new measure stronger support mechanisms for CSOs need to be developed, to provide them with more information on opportunities for twinning and exchanges, and assistance in terms of applying for funding. As any new scheme unfolds, it will be important to learn lessons and promote best practice and common approaches and tools. In addition, the scale of resources applied, over a sustained period, needs to be appropriate to the scale of the challenge.

Recommendations

A new measure should be incorporated into the Europe for Citizens programme, which explicitly offers support primarily for placement activity between eligible CSOs and is specified as follows:

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[2] Where one funding scheme is set up to support only mobility activity, rather than support being provided for a series of projects which contain differing proportions of mobility activity and where each project has its own 'internal' system for organising mobility and/or other activity.

Measure 3.2 "Support for Learning Mobility for Civil Society Organisations

1. The aim of the measure shall be to provide CSOs with a new learning / developmental opportunities to engage in active citizenship through engagement with EU governance in relation to key policy areas. Its purpose would be to equip civil society organisations to better understand and engage in areas of policy making where European Added Value will be maximised.

2. The new measure would support placement opportunities lasting from one to six months[3], arranged between CSOs based in up to five Member States. Placements may be:

   - Reciprocal and simultaneous;

   - Reciprocal but take place at different times;

   - One way (for example to an EU level umbrella or representative body.

3. Participation will focus on CSOs, including NGOs which are new to engagement in EU policy or are entering into a new area of policy. Trades union bodies, educational institutions and also employers bodies where acting in a wider community interest should also be eligible

4. The thematic coverage of the measure should reflect overarching EU policy goals, for example climate change or Europe 2020. Applicants should be required to demonstrate this in their proposal and it should be reflected in the scoring. In addition, consideration should be given to application windows being centred on specific policy themes in order to give coherence and to reduce the number of high quality but unsuccessful applications.

5. Eligible activities should include initial participation through placements within EU networks or to engage with EU level umbrella / representative bodies. Mobility activities must be explicitly justified in relation to the overall programme objectives. Each project proposal must set out a specific objective which relates the mobility opportunity to better understanding of and preparation for engagement with EU policy making and impact.

6. Placements would be supported for periods of between one and six months.

7. In line with other EU mobility actions, we propose that consideration is given to offering a preparatory grant of a maximum of €1,000 for undertaking initial visits and preparatory actions. The process for eligibility and approval should balance the need for public accountability with the need for application procedures to be proportionate to the funding being accessed.

8. Further to this, we propose that a partner-matching database facility is established, including interactive tools, which will permit potential partners to make initial identification and contact. It is acknowledged that this is only a partial step and that direct contact will be needed, but for many organisations, especially those with limited experience and resources, this can be an important mechanism to support the application process.

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[3] To make allowances for potential short term impact that the loss of a staff member may have on an organisation's capacity, while ensuring a sufficient period to provide for in-depth learning.

9. In terms of the application process the new measure should be accessed via an electronic form. The need to send support documents through the post should be also reviewed and wherever possible replaced by scanned / faxed documents, especially for small projects.

10. We would propose a two or three phase call for applications per year (as provided for other measures within the programme). Infrequent application windows deter applications from those organisations who have limited experience / access to information and also those who have a strong need to develop understanding and knowledge. Ideally an open access application process would be introduced, but to reflect the wider structure of the programme, three annual phases could be introduced for the initial period at least. Each call might focus on a specific area of relevant EU policy.

11. We would suggest that use of flat rates provides a number of advantages over budget-based grants – simplicity of administration and transparency for example. Actual rates would need to be calculated based on a detailed analysis of real costs; but indicative rates might be in the region of €3,000 for the initial month of a placement (including one month placements)[4], together with an international travel allowance of €500. For the second and subsequent months, a monthly allowance of €2,500 might be provided to cover accommodation etc., together with a further €500 for international travel for the entire additional period. Finally, a maximum EU contribution amounting to a maximum of 5% of the total cost of the placement action might be added to contribute towards the administrative and related costs incurred by each CSO partner.

12. Should a budget-based grant approach be preferred, we would recommend that a maximum grant amounting to 80% of the total eligible costs is made available.

13. A maximum total of €20,000 should be available for any individual placement scheme, regardless of the financing approach used.

14. Provision of a pre-financing element of up to 50% of the grant on contract signature would allow projects to commence implementation. It is also important for applicants to focus on delivering good quality and useful actions from the support provided and we therefore propose that the final 50% of the grant is provided against proof of outputs on completion.

15. A time limit of 12 months for the implementation of individual mobility activity is proposed.

16. It is also important to review existing measures within the programme in this context to ensure synergy and avoid any duplication or overlap.

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[4] To cover accommodation, meals and subsistence, local travel and related items.

Résumé

Introduction

L'Agence exécutive « Education, audiovisuel et culture » et la Direction Générale de la Communication de la Commission européenne ont chargé ECORYS de réaliser une étude sur *la maximisation du potentiel de la mobilité dans la construction d'une identité européenne et la promotion de la participation civique au sein de l'UE* visant principalement à mieux comprendre la façon dont le potentiel pour soutenir la mobilité au sein de la société civile, offert par le programme « l'Europe pour les citoyens », pourrait être optimisé et pleinement exploité.

L'étude a examiné d'un œil critique la pratique actuelle afin de permettre d'analyser en toute connaissance de cause les mesures potentielles qui devraient être prises pour optimiser la mobilité transnationale au sein de la société civile dans le cadre du programme « l'Europe pour les citoyens » (et son successeur éventuel) et de prendre en compte les enseignements tirés de la mesure « Actions innovantes » établie en 2009. Cette étude s'est également attachée à la capacité des acteurs au sein de la société civile à participer à un tel programme, et comprenait une évaluation du niveau d'intérêt et de besoin à cet égard, et des synergies potentielles avec d'autres programmes de l'Union européenne. Afin de guider le développement des options possibles, nous avons examiné les facteurs de succès découlant des plans actuels de mobilité transnationale au sein de la société civile et avons tenu compte des leçons qui en ont été tirées.

Méthode de recherche

Les questions principales aux fins de l'étude étaient axées sur:

Besoin/demande : *quel problème ou quelle carence un programme amélioré de mobilité doit-il résoudre, quelles sont les preuves d'un besoin/d'une demande d'un tel programme et quelles parties prenantes, quels groupes cibles etc. ont besoin d'être soutenus ? Existe-t-il des obstacles qui empêchent systématiquement certains types d'organisation d'y participer ?*

Offre : *quels types d'organisations, d'intermédiaires et d'autres parties prenantes pourraient être en mesure de fournir les services et les activités pour lesquels une demande existe ? (Ceci est au cœur du problème relatif aux capacités et compétences des organisations de la société civile pour relever ce défi positivement et à l'échelle nécessaire).*

Valeur ajoutée : *comment les programmes mobilité ainsi que leurs promoteurs et les agents chargés de leur exécution peuvent-ils cibler la valeur ajoutée au niveau européen plutôt que de se contenter d'accroître les efforts nationaux et bilatéraux, et éviter de contribuer à la fragmentation et aux répétitions ?*

Modèles/mécanismes : *quels exemples peuvent être identifiés, qui démontrent la manière dont les objectifs politiques peuvent être atteints si leurs éléments réussis sont appliqués dans une plus vaste mesure ?*

Afin de collecter les informations et données nécessaires pour répondre à ces questions, un programme de recherche a été réalisé, qui comprenait les éléments suivants : **Recherche documentaire** pour recueillir et analyser les informations et données concernant le type et l'éventail de participants potentiels à toute nouvelle mesure de mobilité, et évaluer la pertinence de la fourniture actuelle de services et activités par l'Union européenne dans un certain nombre de domaines; **consultations individuelles avec les parties prenantes** pour obtenir leur point de vue sur la fourniture actuelle concernée, donner un aperçu qualitatif de la demande latente et des obstacles potentiels, et aider à déterminer les aspects sur lesquels la recherche et les ateliers doivent être axés; deux **ateliers interactifs** à Bruxelles, premièrement pour stimuler les débats sur les priorités stratégiques et deuxièmement pour aider à identifier les aspects opérationnels potentiels d'un programme de mobilité, nouveau ou prolongé ; et l'examen (par le biais d'examens documentaires, d'entretiens et de visites) d'une série de **modèles opérationnels** avec le potentiel de fournir des leçons transférables pour un nouveau programme.

Résultats

En termes d'**activités existantes,** on a constaté que malgré les possibilités diverses à la disposition des organisations de la société civile de participer à la mobilité, les mécanismes actuels ne répondent pas efficacement à leurs besoins - Le programme « l'Europe pour les citoyens » contribue considérablement à la promotion de la participation civique et à la construction d'une identité européenne, mais les initiatives de mobilité (au niveau des placements à long terme ou des échanges destinés à fournir une expérience pratique) doivent rivaliser avec des activités de soutien opérationnel ou de plus vastes projets pour obtenir le financement nécessaire.

En termes d'**acteurs actuellement impliqués** dans les questions d'identité et de citoyenneté (organisations, sous-secteurs, problèmes ou intérêts majeurs), les organisations actives au niveau de l'Union européenne sont bien connues, puisqu'un grand nombre d'entre elles participent souvent aux programmes de l'UE comme le Programme « l'Europe pour les citoyens » et reçoivent des subventions de fonctionnement de la Commission européenne. Nous savons qu'une grande variété d'organisations (non limitées aux ONG) encouragent activement la participation civique et la construction d'une identité européenne ou ont le potentiel d'élargir leurs activités en passant d'un niveau local/régional/national à une perspective plus transnationale. Cela inclut les réseautages et collaborations de grande envergure, en partie parce que l'activité collaborative fait partie intégrante de la plupart de l'activité axée sur la société civile.

En termes de **besoins et de ressources**, les organisations de la société civile sembleraient avoir spécifiquement besoin de possibilités supplémentaires de participer à des activités de mobilité <u>pratiques et concrètes</u> qui soient accessible à un plus grand groupe cible, et qui aillent au-delà des mouvements à court terme (par ex. visites d'étude, conférences, projets de recherche). Cela leur permettrait de construire leurs propres capacités (ainsi que celles du secteur globalement) en ce qui concerne les objectifs politiques européens et serait durable à long terme. L'accent doit être mis sur « l'apprentissage par la pratique », c'est-à-dire sur le fait d'exposer les bénéficiaires au type d'expérience pratique qui apporte une valeur significative aux organisations et aux particuliers, et qui déclenche un engagement à plus long terme avec l'Union européenne. Les besoins de ce secteur correspondent aux « besoins » ultimes des politiques de l'UE, en termes de mobilisation des compétences et de l'expérience des organisations de la société civile pour faire progresser la nouvelle stratégie Europe 2020. L'élargissement de l'expérience pratique des organisations de la société civile par le biais de la mobilité

pourrait contribuer significativement aux objectifs politiques de l'Union européenne. Toutefois pour avoir un impact, il devra être d'une ampleur suffisante.

Le niveau des **ressources attachées à la mobilité** par la Commission Européenne est important, notamment dans les domaines de l'éducation, de la culture et de la recherche et du développement technologique. Cette approche s'est avérée présenter des avantages dans une assez grande mesure. Même si le « secteur » de la société civile n'est pas aussi uni que d'autres secteurs, cela ne signifie pas nécessairement que certains des principes clés des programmes de mobilité ne peuvent pas être appliqués au secteur de la société civile afin de maximiser l'impact de leurs propres activités de mobilité. Un certain nombre de programmes de mobilité réussis de l'Union européenne sont caractérisés par l'accent sur l'expérience pratique, avec des procédures comparativement simples et, dans certains cas, des montages financiers simplifiés (subventions forfaitaires pour payer une partie des dépenses par exemple)[5]. Bien que ces approches ne soient clairement pas directement transférables, elles offrent des leçons en termes de moyen rentable d'atteindre l'objectif d'optimisation de la mobilité par le biais des organisations de la société civile . La contribution potentielle des organisations de la société civile pour atteindre les objectifs politiques de l'Union européenne est considérable, mais par comparaison avec d'autres secteurs, il existe moins de mécanismes permettant de cibler et de canaliser systématiquement le soutien pour la mobilité.

En termes de **demande et de capacité**, on a constaté une forte demande d'amélioration des programmes de mobilité et un grand fossé entre l'offre et la demande de possiblités de placements ou d'échanges entre les organisations de la société civile, y compris d'un niveau à un autre (européen, national, régional et local). Les projets de mobilité qui offrent une expérience pratique peuvent fortement contribuer à construire la capacité de la société civile à prendre part à l'agenda politique et stratégique de l'Union européenne. Le meilleur moyen de mettre en œuvre ce type d'activité, à une échelle suffisamment grande et sur une période suffisamment longue, consiste à offrir un programme simple et systématique sans critères de sélection trop stricts, avec une approche souple au niveau de l'accent thématique. Bien que toutes les organisations de la société civile n'aient pas les capacités nécessaires pour saisir ces occasions, un nombre suffisant d'entre elles est en mesure de le faire pour qu'il soit viable. Le secteur cible devra toutefois être soutenu en termes d'information et de sensibilisation ainsi qu'à travers des petites subventions préparatoires pour faciliter la préparation d'actions de mobilité. Les types de structures intermédiaires présentes dans d'autres secteurs (universités, agences nationales du programme d'éducation et de formation tout au long de la vie, agences d'entreprises régionales etc.) ne sont pas toujours disponibles pour le secteur de la société civile. Bien qu'il existe clairement des capacités significatives au sein des organisations de la société civile, elles ne sont pas toujours systématiquement liées entre elles, excepté peut-être au niveau de l'Union européenne.

La priorité **stratégique** principale consiste à donner aux organisations de la société civile les moyens de mieux comprendre les domaines d'élaboration des politiques dans lesquels la **valeur ajoutée européenne** sera maximisée et d'y prendre part, notamment en termes de contribution à l'une des priorités majeures de l'UE à savoir : mobiliser les citoyens, particulièrement dans le contexte d'Europe 2020. Un plan de mobilité de l'apprentissage distinctif et clairement identifiable permettrait de répondre à

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[5] On peut citer à titre d'exemple Erasmus (pour les étudiants), Erasmus Mundus, Marie Curie, Erasmus pour les jeunes entrepreneurs, ainsi qu'Erasmus pour les journalistes et pour les syndicats (ce dernier étant soutenu dans le cadre de la mesure Actions innovantes du Programme « L'Europe pour les citoyens »).

cet objectif prioritaire. Il devrait mettre l'accent sur l'expérience pratique (« l'apprentissage par la pratique ») – en étant axé sur les placements et les échanges – et être accessible à un groupe cible plus vaste (par exemple, il est essentiel de faire participer davantage d'organisations de la société civile nationales, régionales et locales aux activités de mobilité de l'apprentissage). On devrait envisager, dans ce contexte, de fournir une base de données de contacts aux organisations de la société civile pour leur permettre de trouver des partenaires compatibles pour des placements.

Les informations et données existantes sur les plans de mobilité indiquent que les initiatives qui adoptent une **approche basée sur des systèmes**[6] ont une plus grande chance d'avoir un impact. Grâce à cette approche, l'accent peut être mis sur la mobilité pratique pendant de longues périodes, en permettant ainsi des échanges plus riches et plus poussés et en facilitant la création de partenariats à long terme. Afin de garantir la **durabilité** des nouvelles mesures, il est nécessaire de développer des mécanismes de soutien plus solides pour les organisations de la société civile afin de leur fournir davantage d'informations sur les possiblités de jumelage, d'échanges, ainsi que l'assistance nécessaire pour leurs demandes de financement. Dans le cadre du déploiement d'un nouveau programme, il sera important de tirer des leçons utiles et de promouvoir les meilleures pratiques et les approches et outils communs. Par ailleurs, l'envergure des ressources utilisées sur une période prolongée doit être adaptée à l'ampleur du défi.

Recommandations

Une nouvelle mesure, énoncée ci-dessous, devrait être intégrée dans le programme « l'Europe pour les citoyens » afin d'offrir explicitement un soutien principalement destiné à l'activité de placement entre les organisations de la société civile éligibles.

Mesure 3.2 « Soutien pour la mobilité de l'apprentissage pour les Organisations de la Société Civile »

1. Cette mesure aurait pour objet de fournir aux organisations de la société civile de nouvelles opportunités d'apprentissage/de développement pour prendre part à une citoyenneté active en s'impliquant dans la gouvernance de l'Union européenne concernant les domaines d'action clés. Elle viserait à donner aux organisations de la société civile les moyens de mieux comprendre les domaines d'élaboration des politiques dans lesquels la **valeur ajoutée européenne** sera maximisée et d'y prendre part.

2. La nouvelle mesure soutiendrait des placements qui dureraient de 1 à 6 mois[7], organisées entre des organisations de la société civile basées dans cinq Etats membres maximum. Les placements pourraient être:

   - Réciproques et simultanés;

   - Réciproques mais à différents moments;

   - Unilatéraux (par ex. dans un organe parapluie ou représentatif au niveau de l'Union européenne).

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[6] Lorsqu'un plan de financement est établi pour soutenir uniquement une activité de mobilité, plutôt qu'une série de projets qui contiennent des proportions variées d'activité de mobilité et dans lesquelles chaque projet possède son propre système « interne » d'organisation de la mobilité et/ou une autre activité.

[7] Pour tenir compte de l'impact potentiel à court terme de la perte éventuelle d'un membre du personnel sur la capacité d'une organisation, tout en offrant une période suffisamment longue pour un apprentissage poussé.

3. La participation sera axée sur les organisations de la société civile , y compris les ONG qui sont nouvellement engagées dans les politiques de l'Union européenne ou qui viennent de pénétrer dans un nouveau domaine politique. Les syndicats, les établissements d'enseignement et les groupements d'employeurs qui agissent pour l'intérêt général devraient également être éligibles.

4. La couverture thématique de cette mesure devrait refléter les objectifs ultimes de l'Union européenne, par exemple le changement climatique ou Europe 2020. On devrait demander aux candidats de démontrer cet élément dans leur proposition et ceci devrait être pris en compte lors de l'évaluation et la notation de la candidature. En outre, on pourrait songer à établir des appels à candidature thématiques spécifiques afin de garantir une certaine cohérence et de réduire le nombre de candidatures de grande qualité qui échouent.

5. Les activités éligibles devraient inclure une participation initiale par le biais de placements au sein de réseaux de l'Union européenne ou un engagement avec des organes parapluies ou représentatifs au niveau de l'UE. Les activités de mobilité doivent être explicitement justifiées par rapport aux objectifs globaux du programme. Chaque proposition de projet doit énoncer un objectif spécifique qui établisse comment l'expérience de mobilité contribue à une meilleure compréhension des processus d'élaboration des politiques européennes et à une participation renforcée à ces processus.

6. Les placements devraient être soutenus pendant 1 à 6 mois.

7. De même que pour d'autres actions de mobilité de l'Union européenne, nous suggérons d'envisager d'offrir une subvention de préparation d'un maximum de 1.000 € pour les visites et actions préparatoires initiales. Le processus d'éligibilité et d'approbation devrait permettre un équilibre entre le besoin de responsabilité publique et la nécessité que les procédures de candidature soient adaptées au financement offert.

8. Nous proposons également l'établissement d'un système de base de données pour trouver des partenaires compatibles, avec des outils interactifs qui offriraient aux partenaires potentiels un processus d'identification et de contacts initiaux. Nous admettons qu'il s'agit là d'une étape partielle et qu'un contact direct sera nécessaire par la suite, mais pour de nombreuses organisations, notamment celles qui jouissent d'une expérience et de ressources limitées, cela pourrait être un mécanisme important pour soutenir le processus de candidature.

9. Le processus de candidature pour cette nouvelle mesure devrait être accessible par voie électronique, mais le recours au courrier postal pour les documents fournis en appui des candidatures devrait également être ré-examiné et, si possible, remplacé par des documents scannés / faxés, notamment pour les projets de petite envergure.

10. Nous proposons un appel à candidatures échelonné en deux ou trois phases chaque année (comme pour les autres mesures du programme). Des intervalles irréguliers de périodes de candidature dissuadent généralement les organisations qui jouissent d'une expérience/d'un accès limité(e) aux informations et qui ont, en outre, réellement besoin de mieux comprendre et connaître l'aspect mobilité. L'idéal serait un processus de candidature accessible tout au long de l'année mais, afin de refléter la vaste structure du programme, il pourrait y avoir trois phases durant l'année, tout du moins pour la période initiale. Chaque appel pourrait être axé sur un domaine spécifique de la politique de l'UE.

11. Nous pensons que des subventions forfaitaires offriraient un certain nombre d'avantages par rapport aux subventions basées sur un budget – simplicité d'administration et transparence par exemple. Les montants effectifs devraient être calculés en se basant sur une analyse détaillée des coûts réels ; mais, à titre indicatif, ces montants pourraient se situer aux environs de 3.000 € pour le premier mois du placement (y compris les placements d'un mois)[8], avec une indemnité de déplacement international de 500 €. Pour le deuxième mois et les mois suivants, une subvention mensuelle de 2.500 € pourrait être offerte pour les frais d'hébergement etc., ainsi que 500 € pour les déplacements internationaux pour toute la période additionnelle. Enfin, une contribution maximum de l'Union européenne équivalente à 5 % maximum du coût total de l'action de placement pourrait être ajoutée afin de participer aux frais administratifs et connexes encourus par chaque organisation de la société civile partenaire.

12. Si une approche de subvention basée sur un budget est privilégiée, nous recommandons une subvention maximum équivalente à 80 % des coûts éligibles totaux.

13. Un montant maximum de 20.000 € devrait être disponible pour tout plan de placement individuel, quelle que soit la méthode de financement.

14. Un élément de préfinancement de 50 % maximum de la subvention, à la signature du contrat, permettrait de commencer la mise en œuvre des projets. Il est également important que les candidats concentrent leurs efforts sur la réalisation d'actions utiles et de bonne qualité grâce au soutien qui leur sera apporté, et nous proposons par conséquent que les 50 % restants de la subvention soient versés à l'issue de l'examen des éléments probants concernant les résultats de l'action, une fois celle-ci terminée.

15. Nous suggérons un délai maximum de 12 mois pour la mise en œuvre d'une activité individuelle de mobilité.

16. Il sera également essentiel d'examiner les mesures existantes au sein du programme dans ce contexte afin d'assurer leur synergie et d'éviter les doublons ou les chevauchements.

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[8] Pour les frais d'hébergement, de repas et de subsistance ainsi que les déplacements locaux et frais connexes.

Kurzfassung

Einleitung

ECORYS wurde von der Exekutivagentur Bildung, Audiovisuelles und Kultur der Europäischen Kommission und von der Generaldirektion Kommunikation mit der Durchführung einer ***„Studie zur Maximierung des Potenzials für Mobilität bei der Schaffung einer europäischen Identität und zur Förderung der Bürgerbeteiligung in der EU"*** beauftragt. Das allgemeine Ziel der Studie ist eine Vertiefung des Verständnisses, wie das durch das von dem Programm „Europa für Bürgerinnen und Bürger" gebotene Potenzial zur Unterstützung der Mobilität der Zivilgesellschaft erweitert und umfassend genutzt werden kann.

Die Studie nimmt die bestehende Praxis kritisch unter die Lupe, um zu analysieren, welche Maßnahmen getroffen werden könnten und sollten, um die transnationale Mobilität der Zivilgesellschaft im Rahmen des Programms „Europa für Bürgerinnen und Bürger" (und möglicher Folgeprogramme) effektiver zu gestalten. Dabei sollten die Erfahrungen, welche in der 2009 eingerichteten Programmkomponente „Innovative Maßnahmen" gewonnen wurden, berücksichtigt werden. Ferner erwog die Studie die Kapazität von Akteuren in der Zivilgesellschaft, an einer derartigen Initiative teilzunehmen, einschließlich eine Beurteilung des Interessengrades, des Bedarfs und potentieller Synergien mit anderen Programmen der Europäischen Union. Um mögliche Optionen anbieten zu können, wurden die Erfolgsfaktoren, die aus aktuellen transnationalen Mobilitätsprogrammen für die Zivilgesellschaft abgeleitet wurden, geprüft und die gewonnenen Erkenntnisse berücksichtigt.

Forschungsmethode

Im Mittelpunkt der für die Studie verwendeten Kernfragen, mit denen das Studienziel erreicht werden sollte, standen:

Bedarf/Nachfrage: *Auf welches Problem oder welchen Mangel muss ein verbessertes Mobilitätsprogramm abzielen? Welche Hinweise gibt es für Bedarf/Nachfrage nach derartigen Programmen? Welche Stakeholder, Zielgruppen etc. benötigen Unterstützung? Gibt es Hindernisse, die die Teilnahme wichtiger Organisationstypen systematisch verhindern?*

Bereitstellung: *Welche Arten von Organisationen, Vermittlern und anderen Interessengruppen sind in der Lage, die benötigten Dienstleistungen und Aktivitäten bereitzustellen? (Dies ist der Kern der Frage nach der Kapazität und der Fähigkeit zivilgesellschaftlicher Organisationen, positiv und in ausreichendem Maße auf die Herausforderung zu reagieren).*

Mehrwert: *Wie können Mobilitätsprogramme und ihre Förderer und Zusteller Mehrwert auf europäischer Ebene abzielen, statt einfach nur nationale und bilaterale Bemühungen zu verstärken, und eine stärkere Fragmentierung und Duplizierung vermeiden?*

Modelle/Mechanismen: *Welche Beispiele demonstrieren, wie Politikziele erreicht werden können, wenn erfolgreiche Elemente der Politik weitgehender angewendet werden?*

Um die Grundlage der zur Beantwortung der Fragen notwendigen Erkenntnisse aufzubauen, wurde ein Forschungsprogramm durchgeführt, das folgendes umfasste: **Sekundärquellenanalysen (Desk Research)**, um Informationen über die Art und das Spektrum potentieller Teilnehmer an neuen Mobilitätsmaßnahmen zu sammeln und zu analysieren und um die Relevanz aktueller EU-Angebote in einer Reihe von Politikbereichen zu bewerten; **Konsultationen** mit **einzelnen Stakeholdern**, um Ansichten über aktuelle Angebote einzuholen, einen qualitativen Einblick in die latente Nachfrage und mögliche Barrieren zu erhalten und den Schwerpunkt der Forschung und der Workshops zu formulieren; zwei **interaktive Workshops** in Brüssel, um zunächst eine Debatte über strategische Prioritäten anzuregen und anschließend mögliche funktionelle Aspekte eines neuen oder erweiterten Mobilitätsprogramms zu identifizieren; und Prüfung (durch Sekundärquellenanalyse, Befragungen und Besuche) **operativer Modelle**, die eventuell übertragbare Erkenntnisse für neue Programme bieten.

Ergebnisse

In Bezug auf **bestehende Aktivitäten** lässt das Material darauf schließen, dass obgleich zivilgesellschaftlichen Organisationen (CSOs) verschiedene Möglichkeiten der Teilnahme an Mobilitätsmaßnahmen zur Verfügung stehen, ihre Bedürfnisse durch aktuelle Mechanismen nicht effektiv erfüllt werden – das Programm „Europa für Bürgerinnen und Bürger" leistet einen wertvollen Beitrag zur Förderung der Bürgerbeteiligung und zum Aufbau einer europäischen Identität, aber Mobilitätsinitiativen (im Sinne von längerfristigen Praktika oder Austauschmaßnahmen, die auf die Bereitstellung von Praxiserfahrung abzielen), müssen mit operativer Unterstützung und breiterer Projektaktivität um die Finanzierung konkurrieren. Die Komponente „Innovative Maßnahmen" des Programms „Europa für Bürgerinnen und Bürger" hat einige nützliche Erkenntnisse dazu geliefert, wie der Zugang zu Mobilitätsmaßnahmen verbessert werden könnte.

In Bezug auf die **derzeit beschäftigten Akteure** in den Identitäts- und Bürgerschaftsagenden (Organisationen, Untersektoren, herausragende Fragestellungen oder Interessen) liegen in der Hauptsache Kenntnisse über Organisationen auf EU-Ebene vor, da viele an EU-Programmen wie „Europa für Bürgerinnen und Bürger" teilnehmen und in der Tat von der Europäischen Kommission operative Zuschüsse erhalten. Uns ist bekannt, dass ein breit gefächertes Spektrum von Organisationen (nicht begrenzt auf Nichtregierungsorganisationen) bei der Förderung der Bürgerbeteiligung und bei dem Aufbau einer europäischen Identität aktiv sind oder die Möglichkeit haben, ihre Aktivitäten von einer lokalen/regionalen/nationalen Ebene aus zu erweitern, um eine transnationale Perspektive anzunehmen. Dazu gehören umfassendes Networking und Zusammenarbeit, weil sie unter anderem ein fester Bestandteil der meisten auf die Zivilgesellschaft ausgerichteten Aktivitäten sind.

In Bezug auf **Bedürfnisse und Ressourcen** scheint ein spezifischer Bedarf an Möglichkeiten der Beteiligung zivilgesellschaftlicher Organisationen an praktischen Mobilitätsaktivitäten zu bestehen, die einer breiteren Zielgruppe zugänglich sind und die über kurzfristige Bewegungen hinausgehen (z. B. Studienbesuche, Konferenzen, Forschungsprojekte). Dies würde Organisationen dabei helfen, ihre eigenen Kompetenzen (und die des gesamten Sektors) in Bezug auf europäische Politikziele aufzubauen und langfristig nachhaltig zu sein. Der Schwerpunkt muss auf 'Learning-by-Doing' liegen, d.h. die Nutznießer müssen der Art von Praxiserfahrung ausgesetzt werden, die Organisationen und Personen einen erheblichen Wert liefert und die ein längerfristiges Engagement mit der EU auslöst. Diese Sektorbedürfnisse sind für übergreifende Politikbedürfnisse der EU in Bezug auf Mobilisierung der Kompetenzen und Erfahrungen zivilgesellschaftlicher Organisationen sehr relevant, um die neue

Strategie Europa 2020 voranzubringen. Die Ausweitung von Praxiserfahrung für zivilgesellschaftliche Organisationen durch Mobilität könnte einen erheblichen Beitrag zu EU Politikzielen leisten. Um Auswirkungen zu haben, muss sie allerdings eine geeignete Größenordnung haben.

Das Niveau der **Ressourcen**, welches die Europäische Kommission für **Mobilität** zur Verfügung stellt, ist erheblich, insbesondere in den Sektoren Bildung, Kultur und FTE. Dieser Ansatz hat nachweislich in einem relativ großen Maßstab Vorteile geliefert. Obgleich der Sektor Zivilgesellschaft nicht so kohäsiv ist wie andere Sektoren, bedeutet dies nicht unbedingt, dass einige der Kerngrundsätze derartiger Programme nicht angewendet werden können, um die Auswirkungen zu maximieren. Eine Reihe erfolgreicher EU Mobilitätsprogramme zeichnen sich durch einen Schwerpunkt auf Praxiserfahrung sowie vergleichsweise unkomplizierte Abläufe und in einigen Fällen vereinfachte finanzielle Unterstützung aus (z. B. Nutzung von Pauschalzuschüssen als Beihilfe für Aufwendungen)[9]. Obwohl offensichtlich nicht direkt übertragbar, bieten derartige Ansätze Lehren in Bezug auf eine kostengünstige Realisierung des Ziels der Maximierung des Potenzials von Mobilität durch zivilgesellschaftliche Organisationen. Der mögliche Beitrag zivilgesellschaftlicher Organisationen zu der Realisierung von EU Politikzielen ist beträchtlich, aber im Vergleich zu anderen Sektoren gibt es weniger Mechanismen, durch die eine Unterstützung von Mobilität systematisch angezielt und kanalisiert werden kann.

In Bezug auf **Nachfrage und Kapazität** gibt es Anzeichen für einen starken Bedarf an verbesserten Mobilitätsprogrammen und für eine erhebliche Lücke bei der Bereitstellung von Möglichkeiten für Praktika oder Austauschmaßnahmen zwischen zivilgesellschaftlichen Organisationen, einschließlich zwischen verschiedenen Ebenen (EU, national, regional und lokal). Mobilität, die Praxiserfahrung liefert, kann einen starken Beitrag zum Ausbau der Kapazität der Zivilgesellschaft leisten, sich für die EU Politikagenda zu engagieren. Die beste Methode zur Implementierung dieser Art von Aktivität in einem ausreichenden Maßstab und über einen längeren Zeitraum ist ein einfaches, systematisches Programm, das sich durch niedrige Einstiegsbarrieren und einen flexiblen Ansatz zu thematischen Schwerpunkten auszeichnet. Obgleich nicht alle zivilgesellschaftlichen Organisationen die Kapazität haben, diese Gelegenheit wahrzunehmen, wird eine ausreichende Anzahl dies tun, um es praktikabel zu machen. Der Zielsektor bedarf zunächst allerdings kleinerer Zuschüsse für die Verbreitung von Informationen und Bewusstseinsbildung; diese Zuschüsse würden die Einrichtung von Mobilitätsmaßnahmen unterstützen. Die Arten vermittelnder Strukturen, die in anderen Sektoren präsent sind (Universitäten, LLP nationaler Agenturen, regionale Agenturen für Unternehmen etc.) sind dem Sektor Zivilgesellschaft nicht immer verfügbar. Wenngleich in zivilgesellschaftlichen Organisationen eine erhebliche Kapazität besteht, ist sie nicht immer systematisch verknüpft, es sei denn vielleicht auf EU-Ebene.

Die wichtigste **strategische** Priorität ist es, zivilgesellschaftliche Organisationen so auszurüsten, dass sie Bereiche der Politikgestaltung, in denen **Europäischer Mehrwert** maximiert wird, insbesondere bei einer der politischen Prioritäten der EU (Einbindung der Bürgerinnen und Bürger, vor allem im Kontext von Europa 2020) besser verstehen und sich in diesen engagieren. Ein charakteristisches und deutlich identifizierbares Mobilitätslernprogramm würde dabei helfen, diese Priorität anzugehen. Das Programm sollte Praxiserfahrung ('Learning-by-Doing') in den Vordergrund stellen – auf Praktika und Austauschmaßnahmen fokussieren – und einer breiteren Zielgruppe zugänglich sein (z. B. ist es

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[9] Beispiele: Erasmus (Studenten), Erasmus Mundus, Marie Curie, Erasmus für Jungunternehmer, sowie Erasmus für Journalisten und Gewerkschaften (letzteres wurde im Rahmen der Maßnahme „Innovative Maßnahmen" des Programms „Europa für Bürgerinnen und Bürger" unterstützt).

besonders wichtig, mehr nationale, regionale und lokale zivilgesellschaftliche Organisationen an Mobilitätslernaktivitäten zu beteiligen). In diesem Zusammenhang ist die Bereitstellung einer Kontaktdatenbank, die zivilgesellschaftliche Organisationen bei der Identifizierung von Partnerorganisationen für Praktika unterstützt, zu erwägen.

Die Erkenntnisse aus aktuellen Mobilitätsprogrammen deuten darauf hin, dass bei Initiativen mit einem **systembasierten**[10] **Ansatz** die Wahrscheinlichkeit etwas zu bewirken größer ist. Ein derartiger Ansatz gewährleistet, dass der Schwerpunkt nicht nur vorübergehend auf praktischer Mobilität liegt, und erleichtert einen umfassenden, tiefgehenden Austausch von Kenntnissen sowie den Aufbau langfristiger Partnerschaften. Um die **Nachhaltigkeit** einer neuen Maßnahme zu sichern, müssen stärkere Unterstützungsmechanismen für zivilgesellschaftliche Organisationen entwickelt werden, die ihnen mehr Informationen über Partnerschaften und Austauschmaßnahmen sowie Unterstützung bei der Beantragung von Zuschüssen bereitstellen. Es ist wichtig, aus jedem neuen Programm, das umgesetzt wird, Lehren zu ziehen und optimale Praktiken und gemeinsame Ansätze und Werkzeuge zu fördern. Darüber hinaus muss der Aufwand an eingesetzten Ressourcen über einen längeren Zeitraum der Größe der Herausforderung angemessen sein.

Empfehlungen

In das Programm „Europa für Bürgerinnen und Bürger" sollte eine neue Maßnahme, die explizite Unterstützung für Praktika bei infrage kommenden zivilgesellschaftlichen Organisationen anbietet und wie folgt spezifiziert ist, aufgenommen werden:

Maßnahme 3.2 "Unterstützung für zivilgesellschaftliche Organisationen für das Erlernen von Mobilität

1. Ziel der Maßnahme ist die Bereitstellung neuer Lern-/Entwicklungschancen für zivilgesellschaftliche Organisationen, damit sie mit EU Governance an einer aktiven Bürgerbeteiligung in wesentlichen Politikbereichen teilhaben. Die Maßnahme soll zivilgesellschaftliche Organisationen angemessen ausrüsten, so dass sie Bereiche der Politikgestaltung, in denen Europäischer Mehrwert maximiert wird, besser verstehen und sich in diesen Bereichen engagieren.

2. Die neue Maßnahme würde ein- bis sechsmonatige Praktika[11] unterstützen, die zwischen zivilgesellschaftlichen Organisationen organisiert werden, die Niederlassungen in bis zu fünf Mitgliedstaaten betreiben. Diese Praktika können:

   • wechselseitig und gleichzeitig stattfinden;

   • wechselseitig, aber zu unterschiedlichen Zeitpunkten stattfinden;

   • einseitig sein (z. B. bei einer Dachorganisation auf EU-Ebene oder einem Vertretungskörper).

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[10] Hierbei wird ein Finanzierungsprogramm eingerichtet, das nur eine Mobilitätsmaßnahme fördert, statt eine Reihe von Projekten, die Mobilitätsmaßnahmen zu unterschiedlichen Anteilen umfassen, zu unterstützen, und bei denen jedes Projekt über ein eigenes, internes System zur Organisation der Mobilität und/oder einer anderen Aktivität verfügt.

[11] Um kurzfristige Auswirkungen, die der Ausfall eines Mitglieds des Personals auf die Kapazität einer Organisation haben könnte, auszugleichen und gleichzeitig sicherzustellen, dass der Zeitraum lang genug ist, um tiefergehende Lernprozesse zu ermöglichen.

3. Die Teilnahme ist auf zivilgesellschaftliche Organisationen, einschließlich Nichtregierungsorganisationen konzentriert, die sich zum ersten Mal in der EU Politik engagieren oder in einem neuen Politikbereich tätig werden. Organisationen von Gewerkschaften, Bildungsinstitutionen und auch Arbeitgebern, die im breiteren Interesse der Gemeinschaft tätig sind, sind ebenfalls teilnahmeberechtigt.

4. Die thematische Abdeckung der Maßnahme sollte übergreifende Ziele der EU Politik reflektieren, z. B. Klimawandel oder Europa 2020. Antragsteller sollten dies in ihrem Antrag aufzeigen, zudem sollte es bei der Bewertung berücksichtigt werden. Darüber hinaus sollten Bewerbungsaspekte erwogen werden, die sich auf spezielle Politikthemen konzentrieren, um Kohärenz zu sichern und die Anzahl hochwertiger, aber nicht erfolgreicher Anträge zu reduzieren.

5. Infrage kommende Aktivitäten sollten eine anfängliche Teilnahme durch Praktika in EU Netzwerken umfassen oder ein Praktikum bei Dachorganisationen/Vertretungen auf EU-Ebene. Mobilitätsaktivitäten sind in Bezug auf die übergeordneten Programmziele explizit zu rechtfertigen. Jeder Projektvorschlag muss ein spezielles Ziel formulieren, das die Mobilitätschance mit einem besseren Verständnis der EU Politikgestaltung und ihren Auswirkungen sowie mit Vorbereitungen für eine Beteiligung an der Politikgestaltung verknüpft.

6. Praktika würden für Zeitspannen von einem bis sechs Monaten unterstützt.

7. In Übereinstimmung mit anderen Mobilitätsmaßnahmen der EU schlagen wir vor, eine Beihilfe von maximal 1.000 Euro für die Durchführung erster Besuche und vorbereitender Maßnahmen anzubieten. Bei dem Auswahl- und Genehmigungsverfahren ist die öffentliche Rechenschaftspflicht damit abzugleichen, dass die Bewerbungsverfahren hinsichtlich der Höhe der verfügbaren Zuschüsse angemessen sein sollten.

8. Darüber hinaus schlagen wir die Einrichtung einer Datenbank vor, die es ermöglicht, Partnerorganisationen zu finden. Diese Datenbank sollte interaktive Instrumente anbieten, die möglichen Partnerorganisationen die erste Identifizierung eines geeigneten Partners und den ersten Kontakt ermöglichen. Dies ist zugegebenermaßen nur ein Teilschritt; ein direkter Kontakt wird notwendig sein. Aber für viele Organisationen, insbesondere Organisationen mit begrenzter Erfahrung und beschränkten Ressourcen kann dies ein wichtiger Mechanismus zur Unterstützung der Bewerbung sein.

9. In Bezug auf das Bewerbungsverfahren sollte die neue Maßnahme elektronisch zugänglich sein. Die Notwendigkeit, unterstützende Dokumente per Post zu schicken, ist ebenfalls zu überprüfen; falls möglich (und insbesondere bei kleineren Projekten) sollten Dokumente stattdessen per Scanner und Faxgerät übermittelt werden.

10. Wir würden zwei oder drei Ausschreibungsphasen pro Jahr vorschlagen (wie bei anderen Maßnahmen innerhalb des Programms). Unregelmäßige Bewerbungsfenster halten Organisationen ab, die nur eine begrenzte Erfahrung bzw. nur beschränkten Zugang zu Informationen haben sowie Organisationen, bei denen ein starker Bedarf an Entwicklung von Verständnis und Kenntnissen besteht. Im Idealfall sollte ein Bewerbungsverfahren mit offenem Zugang eingeführt werden. Aber um die breitere Struktur des Programms widerzuspiegeln, könnten zumindest für den anfänglichen Zeitraum drei jährliche

Phasen eingeführt werden. Jede Ausschreibung könnte auf einen bestimmten Bereich relevanter EU Politik fokussieren.

11. Wir würden nahe legen, dass die Nutzung von Pauschaltarifen eine Reihe von Vorteilen gegenüber Budget-basierten Zuschüssen anbietet, zum Beispiel einfache Verwaltung und höhere Transparenz. Die tatsächlichen Tarife müssten auf der Grundlage einer detaillierten Analyse der tatsächlichen Kosten berechnet werden. Festgestellte Richtsätze könnten bei 3.000 Euro für den ersten Praktikumsmonat liegen (einschließlich einmonatiger Praktika)[12] und es könnte ein internationaler Reisekostenzuschuss von 500 Euro angeboten werden. Für den zweiten und folgende Monate könnte ein Zuschuss von 2.500 Euro bereitgestellt werden, um die Ausgaben für Unterkunft etc. zu decken, sowie für den gesamten weiteren Zeitraum weitere 500 Euro für internationale Reisen. Schließlich könnte ein EU Beitrag von maximal 5% der Gesamtkosten der Praktikumsmaßnahme hinzugefügt werden, um zu den jedem CSO-Partner angefallenen verwaltungstechnischen und ähnlichen Kosten einen Beitrag zu leisten.

12. Sollte ein Budget-basierter Zuschussansatz bevorzugt werden, würden wir empfehlen, einen maximalen Zuschuss von 80% der zulässigen Gesamtkosten bereitzustellen.

13. Ungeachtet des Finanzierungsansatzes sollten für jedes Praktikum insgesamt maximal 20.000 Euro verfügbar sein.

14. Die Bereitstellung einer Vorfinanzierung von bis zu 50 % des Zuschusses bei Unterzeichnung des Vertrags würde Projekten erlauben, mit der Implementierung zu beginnen. Ferner ist es wichtig, dass sich die Bewerber mit der bereitgestellten Unterstützung auf die Lieferung hochwertiger und nützlicher Maßnahmen konzentrieren. Wir schlagen deshalb vor, dass die letzten 50 % des Zuschusses bei Abschluss gegen Vorlage der erzielten Ergebnisse gezahlt werden.

15. Für die Einführung individueller Mobilitätsmaßnahmen wird eine zeitliche Grenze von 12 Monaten vorgeschlagen.

16. Ferner ist es wichtig, bestehende Maßnahmen im Rahmen des Programms in diesem Kontext zu prüfen, um Synergie sicherzustellen und jegliche Duplizierung oder Überlappung zu vermeiden.

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[12] Für Unterkunft, Mahlzeiten, Aufenthalt, lokale Reisen und damit in Verbindung stehende Ausgaben.

1.0 Introduction

1.1 Purpose of the report

In July 2010 ECORYS was commissioned by the European Commission's Education, Audiovisual & Culture Executive Agency and DG Communication to carry out a study on *'Maximising the Potential of Mobility in Building European Identity and Promoting Civic Participation in EU',* with the general objective of deepening understanding of how the potential to support civil society mobility offered by the Europe for Citizens programme and how that potential can be enhanced and fully exploited.

This report presents the findings and is structured as follows:

Section 1 continues by outlining the background and scope of the study, setting out the study objectives and presenting the research strategy;

Section 2 situates the study within the broad policy context related to identity and citizenship, as well as the study's relationship to specific EU policies and key strategies such as Europe 2020;

Section 3 explores the characteristics and needs of the civil society sector and provides a problem description;

Section 4 sets out the preliminary aims and objectives of any new intervention;

Section 5 discusses the key design factors for the effectiveness and feasibility of a new mobility-related intervention;

Section 6 considers the options available for any such intervention and how it could be implemented in practice;

Section 7 summarises the overall conclusions of the study and makes recommendations regarding next steps.

1.2 Background and Scope

The Work Programme on the follow up of the objectives of education and training systems in Europe[13] identifies mobility as a fundamental tool with which to achieve the objectives of developing a sense of European identity, fostering a sense of ownership of the EU and enhancing tolerance and mutual understanding between citizens. In the Terms of Reference (TOR) for this study mobility schemes refers to opportunities for individuals or organisations to take part in structured interactions with counterparts in other Member States (and elsewhere) and to benefit from formal or informal learning experiences. The study's importance and significance therefore lies in the potential that more effective mobility schemes have to offer enhanced impacts, given that (because they support individual and group interactions) such

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[13] Detailed work programme on the follow-up of the objectives of Education and training systems in Europe: Work programme of the Education Council in cooperation with the Commission (February 2002) http://europa.eu/legislation_summaries/education_training_youth/general_framework/c11086_en.htm

schemes are one of the most powerful measures policy-makers can apply to bring about societal and attitudinal change.

The objectives of the Europe for Citizens programme recognise the key role of Civil Society Organisations (CSOs) in achieving a range of policy goals in the field and their role in the Programme itself. But there is also recognition that, despite their relevance and ability as key intermediaries, facilitators, promoters and multipliers of the citizenship and identity agendas, they do not currently play as large a part as they could, for a variety of reasons.

It is important to note that there is no commonly accepted definition of the term CSO. However, as the European Commission has pointed out[14], 'CSO' may be used as shorthand to refer to a range of organisations which include:

Labour-market players (i.e. trade unions and employers federations – "social partners"); organisations representing social and economic players, which are not social partners in the strict sense of the term (for instance, consumer organisations); NGOs (non-governmental organisations), which bring people together in a common cause, such as environmental organisations, human rights organisations, charitable organisations, educational and training organisations, etc.; CBOs (community-based organisations), i.e. organisations set up within society at grassroots level which pursue member-oriented objectives, e.g. youth organisations, family associations and all organisations through which citizens participate in local and municipal life; and religious communities.

In this working definition, CSOs represent, *"...the principal structures of society outside of government and public administration, including economic operators not generally consider being 'third sector' or NGOs"*.

1.3   Objectives of the study

As highlighted above, the general objective of the study is to: *"…deepen understanding of how the potential to support civil society mobility offered by the Europe for Citizens programme can best be harnessed to help build a stronger sense of European identity and promote civic participation…"*

More specifically, we have sought to answer the following questions:

- How might existing mobility schemes be re-engineered or new ones proposed, which offer a more effective way to exploit the potential of CSOs to contribute in these fields?

- How might nationally/regionally-based groups be encouraged to think more about European issues and work towards creating a strong European civil society?

- Do these organisations have the capacity to participate in and drive forward such activity on the wider scale required?

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[14] COM (2002) 704: "Towards a reinforced culture of consultation and dialogue – general principles and minimum standards for consultation of interested parties by the Commission". See http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2002:0704:FIN:EN:PDF

- What was the experience of individuals and organisations who have already taken part in a variety of mobility schemes in terms of good practice and also barriers to participation?

A specific objective of the study was to provide a critical review of existing practice, to inform an analysis of what steps could and should be taken to make trans-national civil society mobility more effective within the Europe for Citizens programme (and its possible successor), including taking account of lessons learned from the Programme's Innovative Actions component established in 2009. In particular, the study aimed to provide a better understanding of the capacity of civil society actors to participate in any such scheme, including an assessment of the level of interest and need and potential synergies with other EU programmes.

To inform the development of possible options, success factors derived from existing trans-national civil society mobility schemes were reviewed and any lessons to be learned taken into account. The outputs of the study set out a range of possible approaches; and we draw conclusions and make recommendations for the development and implementation of a scheme that has the potential to reinforce the capacity of civil society organisations to address European issues and operate in the EU context.

1.4 Research Strategy

1.4.1 Research questions

The table below sets out the research questions used to frame the study.

Table 1.1 Research Questions

Activities	What is the range and what are the types of activities addressing mobility in the sector?
	Are any trends in geographical distribution apparent?
	Are there any trends in terms of themes or issues being addressed through mobility schemes?
Actors	What organisations are currently most engaged with the identity and citizenship agendas? [at EU, national, regional and local levels]
	Which sub-sectors or issues are most well represented in mobility activity?
	Are any groups or interests under-represented?
	What is the extent of partnership working, networks and collaboration among civil society organisations etc. in this field?
Needs	What are the needs of stakeholders and beneficiaries with respect to mobility?
	How well do current mechanisms meet those needs?
Resources	What level of resources is typically applied to relevant mobility schemes and where do they come from?
	Are there any innovative examples of how funding may be better organised and applied?
European Added Value	What added value is achieved through actions at EU level (e.g. scope, scale, volume)?
	What role do current EU policies and measures play in promoting and facilitating civil society mobility and what benefits do they bring?
Demand	What is the evidence of demand for improved mobility schemes and how well is this being met currently?
	What is the extent of any "unfulfilled" demand?
Strategic priorities	What should be the main strategic priorities in terms of increasing mobility?
	What policies and measures are required to address these priorities?
	Which actors are best/worst positioned to take these priorities forward? Why? How can barriers best be addressed?
	How will the sector need to be organised to respond to them effectively?
Capacity	How well equipped is the civil society sector to respond to future demand?
	How could the sector be better organised to respond more effectively to demand?
	What approach would deliver the best results: top-down, bottom-up or a combination?
Measures	What options are available in terms of designing longer-term, more effective mobility schemes?
	What different delivery models should be considered?
	What can we learn from existing schemes in terms of success factors and favourable contextual conditions?
Sustainability	What features would any new scheme need to have to ensure sustainability?
	What policy frameworks need to be in place to ensure continuing support for civil society mobility?

1.4.2 Methodological approach

Our approach to the study was informed by a simple model comprising the key research dimensions we consider fundamental to understanding the mobility landscape in the field of citizenship and identity; and the capacity of civil society organisations and networks to play a larger role. These are explained in the box below:

<table>
<tr><td>Core research issues addressed</td></tr>
<tr><td>

Need/demand: what problem or deficiency does any improved mobility scheme need to address, what evidence is there of need/demand for such schemes and which stakeholders, target groups etc. require support? Are there barriers which are preventing in a systematic way, participation by key types of organisation?

Supply: what types of organisations, intermediaries and other stakeholders might be in a position to provide the services and activities that are in demand? (this is the heart of the issue of the capacity and capability of civil society organisations to respond positively and on a sufficient scale to the challenge).

Added value: How can mobility schemes and their promoters and delivery agents target European level added value rather than simply augment national and bi-lateral efforts and avoid contributing to fragmentation and duplication?

Models/mechanisms: what examples can be identified that demonstrate how the policy goals can be achieved if their successful elements are applied more widely?

</td></tr>
</table>

The following series of research tasks were carried out to explore these different dimensions[15]:

1. **Desk research** was used in particular to gather and analyse evidence concerning the type and range of potential participants in any new mobility measure; and to assess the relevance of existing EU provision across a number of policy areas;

2. **Individual stakeholder** **consultations** were used to seek views on existing provision, provided qualitative insights into latent demand and possible barriers, and helped frame the focus of the research and workshops.

3. Two **interactive workshop sessions**[16] in Brussels, stimulated debate on strategic priorities (18th November 2010), and identified possible operational aspects of a new or extended mobility scheme (8th February 2011).

4. Examination (through desk review, interviews and visits) of a series of **operational models** with the potential provided potentially transferable lessons for any new scheme.

5. Analysis to develop **key features of any new mobility measure**, considered delivery options and formulated a proposed new mobility measure within the Europe for Citizens programme.

The diagram below illustrates how the research tasks conducted fitted together into a coherent whole.

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[15] A list of consultees may be found at Annex 8.
[16] A list of attendees may be found at Annex 6, appended to the Workshop Reports.

Figure 1.1 Study methodology overview
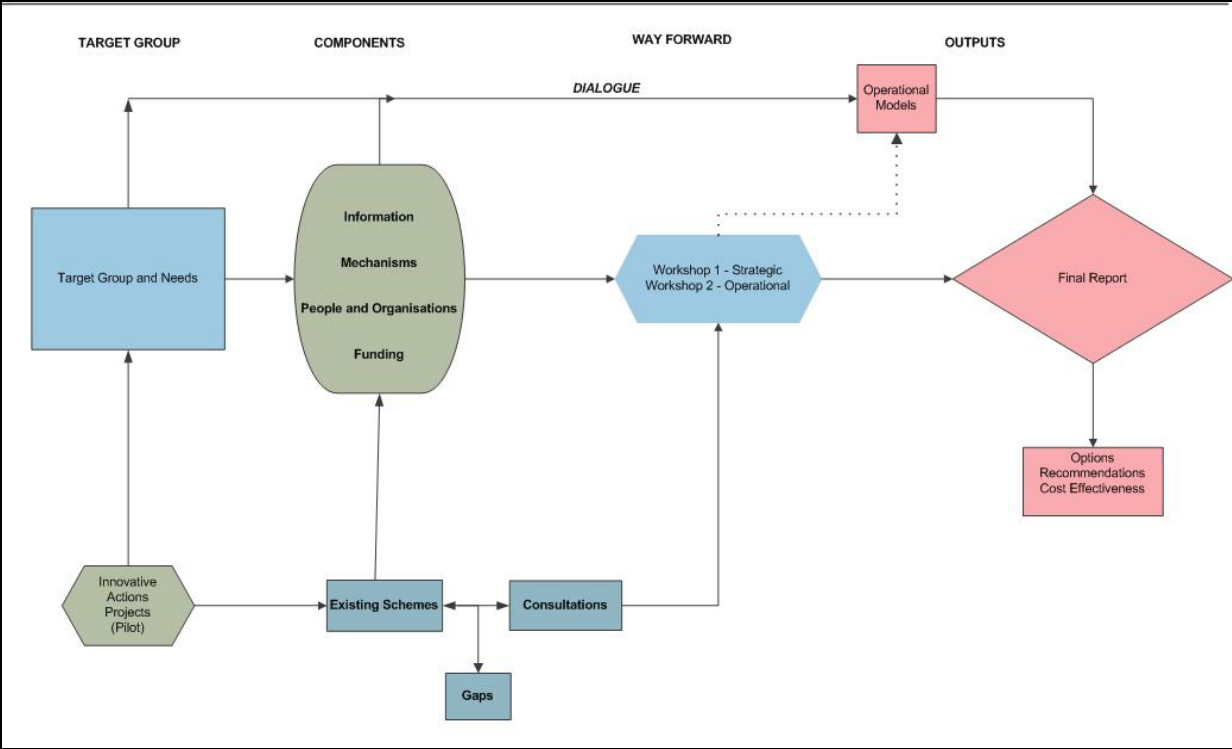
The approach was broken down into four discreet sections: identifying and assessing the target group, establishing the components or building blocks of any new or modified programme, finding the way forward for the programme through further research and consultations, and reporting the findings, including the options assessment and recommendations on delivery.

Throughout the study a dialogue was continued with stakeholders, European Commission representatives and others (including those involved in the Innovative Actions component of the Europe for Citizens programme); gathering the information we needed to build the evidence base.

2.0 Situating the study

2.1 Introduction

In this section we provide context to the study, in particular to provide a historical backdrop, identify the main policy developments in the field of citizenship, active participation and building European identity, and highlight the significance of this policy strand within the overall setting of the EU.

Firstly, we briefly present the broad situation regarding identity and citizenship, then we analyse specific EU policies that promote civic participation, including a review of the relevant features of the Europe for Citizens programme as the key EU funding programme in this field. Finally, we conclude with the overview of the Europe 2020 strategy, given its significance as the newly-established policy framework for the next ten year period; one which will have a profound influence on any future policies and instruments.

2.2 Identity and citizenship in the EU

Formal citizenship of the European Union was established with the Maastricht Treaty in 1992, which gave rights to citizens of Member States by complementing national citizenship. Since then, identity and citizenship issues have assumed growing importance in the body of EU policy and practice, driven by a number of factors including the opening up of the single market, and EU enlargement[17]. Most recently, and especially since the Dutch, French and Irish rejections of the EU Constitutional Treaty, there have been growing concerns at an apparent lack of identification with Europe amongst Europeans.

A 2010 Eurobarometer survey[18] showed that, although Europeans are broadly aware of their status as Union citizens (79% claim some familiarity with the term 'citizen of the European Union'), they lack concrete knowledge about the rights attached to this status: only 43% know the meaning of the term 'citizen of the European Union' and almost half of European citizens (48%) indicate that they are not well informed about their rights as Union citizens.

In 2008 Gallup found that at EU15 level, familiarity with the term "citizen of the European Union" had increased by 7 percentage points compared with 2002. A higher proportion of respondents from the EU15 countries felt themselves informed about their rights as citizens of the European Union compared with the previous survey five years before, an increase of 8 percentage points. (Gallup, 2008).

In this context, it is not surprising that issues of how better to develop a common European identity and active European citizenship alongside national, and other, identities have become prominent. Yet funded activity to support these aims is comparatively recent, and modest: the Europe for Citizens programme

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[17] As set out by the European Commission in 2004, with enlargement "mutual knowledge and understanding between citizens becomes essential. European citizens need to know and be able to experience what they have in common." Communication from the Commission to the Council and the European Parliament — Building our common Future — Policy challenges and Budgetary means of the Enlarged Union 2007-2013 COM(2004) 101
[18] Flash Eurobarometer survey 294 'EU citizenship", March 2010

2007-13 grew out of a smaller programme which commenced only in 2004; the European Heritage Label has only just completed its impact assessment procedure.

Nonetheless, the current Europe for Citizens programme is significant for being the key funding instrument through which the EC can try to bring about change in this area by, in the words of the Decision:

"support(ing) a wide range of activities and organisations promoting active European citizenship through the involvement of individual citizens, local authorities and civil society organisations in the process of European integration."

2.3 Civic participation

Promoting civic participation or 'active citizenship' as it is often referred to by the European Commission, is an ever increasing issue for the European Union, particularly since the last two waves of enlargement in 2004 and 2007 when the total population of the Union reached nearly 500 million. Despite these huge numbers, the Commission seeks to ensure that citizens have an opportunity to experience a feeling of belonging to the Union. Civic participation and the programmes that have been established to encourage this are the means of supporting and enabling citizens to engage more with EU by participating more frequently with its initiatives or in its institutions.

In 2004 a first civic participation programme was launched. Its objectives were to promote the values and objectives of the Union and to bring citizens closer to the EU. The programme was intended for all those involved in civil society and aimed to involve citizens closely in reflection and discussion on the construction of the EU, and to intensify links and exchanges between citizens from the countries participating in the programme, for example through town-twinning. This programme has since developed and is now the "Active citizens for Europe" action of the Europe for Citizens programme. Its focus is now on bringing people from different parts of Europe together in order to promote mutual understanding, a sense of ownership of the EU and the emergence of a European identity.

The quest for developing a shared European identity must compete against other pressures, from local, regional, national and global quarters, which all press upon individuals in terms of shaping their identity and the nature of their civic participation. In this context, mobility schemes clearly have an important role to play in constructing complementary and shared European identities, and it is critical that they are designed in a way that is well-tuned to the types of issues we have discussed in this section. As one interviewee put it: "*We firmly believe that without mobility, there will be no European identity".*

2.4 Europe 2020

In this section we look at the contents of the Europe 2020 Strategy[19] since it is important that any proposed intervention is designed in the context of and consistent with this new high-level strategy. The

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[19] Communication from the Commission, Europe 2020: A strategy for smart, sustainable and inclusive growth, COM (2010) 2020.

Europe 2020 strategy was launched in March 2010 as the ten-year strategy for reviving the economy of the European Union. The strategy has three headings; Smart growth, Sustainable growth and Inclusive growth, under which fall five targets:

- To raise the employment rate of the population aged 20–64 from the current 69% to at least 75%.

- To achieve the target of investing 3% of GDP in R&D in particular by improving the conditions for R&D investment by the private sector, and develop a new indicator to track innovation.

- To reduce greenhouse gas emissions by at least 20% compared to 1990 levels or by 30% if the conditions are right, increase the share of renewable energy in final energy consumption to 20%, and achieve a 20% increase in energy efficiency.

- To reduce the share of early school leavers to 10% from the current 15% and increase the share of the population aged 30–34 having completed tertiary education from 31% to at least 40%.

- To reduce the number of Europeans living below national poverty lines by 25%, lifting 20 million people out of poverty.

Civil society is highlighted as an important tool for delivering the strategy. The Europe 2020 strategy states: *"The successful delivery of the Europe 2020 strategy will depend upon involvement from all sections of society."*[20] This will include: businesses; trade unions; non-governmental organisations; local authorities and individual citizens.

At a conference held in September 2010 on the role of Civil Society in Europe 2020 Mario Sepi the European Economic and Social Committee's (EESC) outgoing president stated that: *"...one of the main reasons for the failure of the Lisbon strategy was the lack of ownership that resulted from insufficient involvement of the social partners and civil society in the strategies design and implementation."*[21] In support of this President of the European Commission Mr Barroso has also called on social partners within the EESC to play a crucial role in the practical implementation of the structural reforms foreseen in the Europe 2020 strategy. Civil Society clearly has an important role to play in the new Europe 2020 strategy arena. The Commission needs civil society to engage and contribute to the new agenda to ensure its success.

The European Commission describes the unique position held by civil society operators in the introduction to the Europe for Citizens programme; they have a *"unique link between citizens and government, helping make the voices of citizens heard and encouraging people's active participation in the political process. In addition, think-tanks and policy research organisations are invaluable in providing visions for the future, as well as generating ideas and recommendations on how to approach complex issues, such as EU policies, active European citizenship, identity and values".*[22] This suggests that these organisations and the initiatives and structures that support them will have an increasingly important role to play in the future of the European Union.

[20] Europe 2020 Strategy- http://ec.europa.eu/europe2020/who-does-what/stakeholders/index_en.htm
[21] Social Partners and civil society hold the key to the success of the Europe 2020 Strategy; Europa Press Release 1/10/2010
[22] http://ec.europa.eu/citizenship/programme-actions/doc40_en.htm

Recent discussions at the conference (highlighted above) discussing civil society's role in Europe 2020 emphasised that social governance mechanisms will need to be developed to structure the increasing involvement of civil society. There is significant potential for the Europe for Citizens programme to play a key role in developing these structures using the extensive networks of stakeholders already engaging with the programme, whilst drawing in new stakeholders through new initiatives and actions to contribute to the overall strategy.

2.5   Potential role for the EU

Here we focus on the added value of EU involvement (in supporting mobility in the context of civil society development). We have already seen from the foregoing discussion that citizenship (specifically EU citizenship) is firmly established in policy and strategy, and that the EU therefore has a remit to act in matters concerning the development of a sense of European identity, raising awareness of EU citizenship and EU institutions and promoting and encouraging interactions between citizens of different Member States to build cohesion, enhance mutual understanding between different nationalities and promote active citizenship and participation. Civil society has a role to play in all of these areas, so hence support for the development of civil society is also a key area of interest at EU level.

We have also seen that the development of the new Europe 2020 strategy, EU policy makers are keen to address perceived weaknesses in the implementation of the Lisbon Strategy 2000-2010 in terms of a lack of engagement with civil society partners in its implementation. The Europe 2020 strategy is central to EU programmes and so should also closely underpin the focus of mobility schemes.

We also know that the civil society 'sector' is characterised by a high degree of variability and that there is a gap between the national and EU level. It may therefore be argued that European Added Value (EAV) may reside in the potential to mobilise civil society organisations more systematically and to link them to key EU policy goals – i.e. not mobilising or unlocking capacity only in terms of types of organisation, but in order to maximise the contribution such organisations can make across a whole range of policy domains and issues. EAV may therefore be summarised as the value of building capacity and capability of civil society (individuals and organisations) on <u>issues of general interest at EU level and relevance to all Member States</u> through:

- Increased networking effects, for example through more efficient and effective interactions between EU and national/regional/local organisations;

- Enhanced professional development through practical trans-national experience (where there is insufficient supply of opportunities emanating from national level);

- Increased knowledge sharing through inter-thematic and inter-organisational engagement;

- Better structuring of training/learning environments;

- Scale and quality of outputs and impacts.

We also need to consider limitations to the EU's role: for example the room to manoeuvre provided by the EU's financial regulations, the limited resources available to fund and manage activity and the

potential for leveraging additional resources from other programmes, stakeholders or relevant constituencies of interest.

3.0 Needs analysis and problem description

3.1 Introduction

In this chapter we look in more detail at the challenges identified at the European level regarding the engagement of civil society organisations. We then provide an overview of existing mobility schemes supported by the EU, and existing provision for CSOs, to explore the extent to which the needs identified are currently being met. This is followed by consideration of the potential role of the EU in meeting these needs, and the extent to which there is a scope for additional intervention at the EU level.

In this context of broad challenges facing the EU, there are three related but distinct areas that need to be considered:

- the need to bolster and develop civic participation and the building of European identity;

- the need to support the development of a vibrant and extensive 'organised civil society' as a key vehicle through which to address these needs; and

- the need to develop various forms of trans-national mobility as a mechanism to enable 'organised civil society' to better engage with democratic processes and institutions and with European policy.

3.2 The EU democracy and the role of civil society

The first of two of these needs are well-established and more or less uncontentious. The EU continues to register declining interest in the political process both within many Member States and at EU level, as evidenced by declining participation in EU elections (see Figure 3.1, below). Many countries are now engaged in seeking ways to re-engage the public in civic participation, often indeed making this a central plank of policy, as evidenced by the current UK Government's 'Big Society' policy which seeks to energise voluntary citizen participation[23].

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[23] Although this is also seen as a way of filling the gaps in public expenditure as part of the attempt to reduce the public spending deficit.

Figure 3.1 Turnout at European elections (1979-2009)
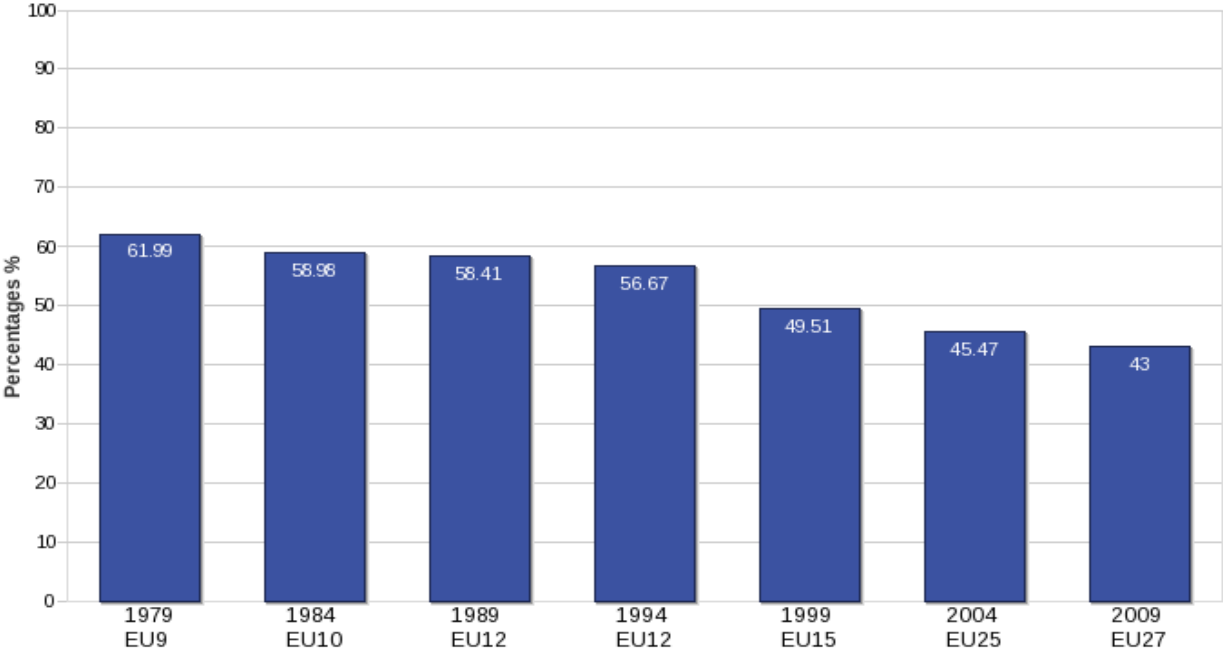
Across all levels of governance within Europe, the argument that civil society has a major role to play in tackling these issues has general currency. This is backed up by a substantial and expanding body of research which stresses the role of civil society as 'a crucial part of the public space between the state and the family, and embodied in voluntary organisations.'[24]

Organised civil society is vast and pervasive. However, generally the field is regarded as including: religious groups, sports clubs, educational, cultural and artistic organisations, trades unions, political parties, environmental organisations, professional associations, and charitable and voluntary organisations. It ranges across a continuum from local, small scale voluntary self-help groups through to international NGOs such as those that work in poverty relief. An assessment in one major EU city (Birmingham) suggested that there were over 5,000 civic society organisations of which only maybe 200 were formally constituted with paid staff and or budget. [25] The latter group are of course far more likely to engage in external funding programmes and opportunities, but the former often connect directly to the day to day concerns and interests of citizens.

At EU level, the role of civil society is well articulated in the Preamble to the Decision establishing the Europe for Citizens programme. Here, 'organised civil society' is seen by the EC as comprising organisations at European, national, regional and local levels which have the potential to act (a) as key vehicles through which the active participation of citizens can be encouraged, and (b) as 'intermediaries between Europe and its citizens'[26].

[24] Howard, M.M. (2003) *The Weakness of Civil Society in Post-Communist Europe*. Cambridge: CUP, page 1

[25] LRDP for GOWM / WMEN, 2001

[26] Item (12) in the preamble to the Decision establishing the *Europe for Citizens programme*

The development of the EU has seen the development of an EU-level organised civil society, much of it located in Brussels. According to the EC, there are about 2,600 lobbying groups and more than 15,000 representatives of various groups active in Brussels. Such groups tend to be affiliations or platforms representing coalitions of interests from across Europe. Examples are the European Disability Forum, European Women's Lobby and ILGA Europe which is active in the field of gay, lesbian bi-sexual and transgender organisations. As Ruzza (2004) comments, '*… the European level is becoming a significant target of … advocacy coalitions. EU public-interest lobbying … acquires ever-greater importance in the multiple avenues of a dispersed political authority [in Europe].*'

Unfortunately, perhaps because of its relative youth, it has been pointed out that:

'Although the links between civil society and democracy have been established at the local and national level, not much is known about the extent to which associations contribute to European integration or the functioning of democracy at the (complex) EU level.'[27]

This is a key issue for the study and what research is available suggests that there is scope to improve the inter-connections between EU-level organisations and smaller, national organisations. Sudbery (2003), for example, shows that Brussels-based bodies do not link to individual members (citizens) directly but to member organisations, and tend to focus first on achieving results rather than ensuring 'participatory governance'. Warleigh (2001) and Saurugger (2007) both highlight a tendency for EU-level organisations to prioritise the professionalization of their operations so that they can become more effective in their dealings with the EU. As a result they spend less time educating their supporters about the need to engage with EU policy-makers. Stakeholders also highlighted the lack of connection between EU-level NGOs and their national counterparts as leading to an information deficit about EU policy development and activity seen from the perspective of local, regional and national NGOs.

Another issue concerns the more general question of the extent to which CSOs actually enhance the democratic participation of citizens. It has been pointed out that this is often taken for granted and that there is actually a dearth of empirical research to show that they do[28]. Perhaps this is not surprising. With civil society covering such a vast terrain it is probable that most organisations do not actually engage people in democratic participation. Rather, they contribute to the building of social capital. At the same time, this highlights the highly variable involvement of CSOs with democratic participation and with EU policy areas, with some organisations having a direct involvement and others an indirect one. Stakeholders who provided input to this study highlighted the very significant un-met demand from many parts of civil society for comparatively straightforward information on EU policy and institutions[29].

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[27] van Deth, J.W. and Mahoney, W.A. (2008) *Introduction: from bottom-up and top-down towards multi-level governance in Europe* in Mahoney, W.A. and van Deth, J.W. *Civil Society and Governance in Europe: From National to International Linkages.*

[28] See, for example, van Deth, J.W. and Mahoney, W.A. (2008) *Introduction: from bottom-up and top-down towards multi-level governance in Europe* in Mahoney, W.A. and van Deth, J.W. *Civil Society and Governance in Europe: From National to International Linkages.*

[29] See Workshop 1 Report at Annex 6

3.3 Mobility as a solution

3.3.1 Evidence of impacts

There is widespread evidence of the value of trans-national mobility in developing civic participation and European identity. As the High Level Expert Forum on Mobility[30] pointed out, mobility confers a range of benefits at a variety of levels: (see p9 of the report)

- Individuals develop understanding of other cultures, and enhanced tolerance, as well as a range of personal development benefits. Professionals often take learning back to their organisations. Depending on the type of mobility scheme, organisations can benefit directly in terms of their enhanced capacity.

- At policy level, mobility can lead to cross-fertilisation of ideas and to changes to policy at various levels of government.

The indications are that such benefits are clearly recognised by civil society organisations themselves: Measure 1.6 of Europe for Citizens, which deals with Innovative Actions, has experienced demand well in excess of the amount of funding available (we deal with the results and lessons learned from this measure in more detail in Section 3.4.3.1 and Annex 7). Stakeholders[31] also highlighted the organisational benefits that mobility can deliver in terms of engaging with the EU and in connecting EU and Member State level organisations. In particular, they also drew attention to the need for professionals to share knowledge and experience, across Member States as well as at EU level. Indeed, there was a strong consensus among CSOs that participation in mobility should be targeted at organisations and that any individual mobility should be for professionals rather than citizens and have clear organisational impacts. They also asserted that mobility should enable civil society organisations to connect amongst themselves at different geographical levels (local, regional, national, EU) and with government. This reflects a CSO viewpoint and for the purposes of this study we do not preclude the participation of a wider group of people, where CSOs may be a channel or mechanism for mobility; but where the beneficiary is not necessarily directly connected to the organisation concerned. It is clear however that support for mobility needs to be channelled through an organisation or intermediary, whether directly or indirectly, and funding cannot be given directly to individual citizens.

Mobility is widely accepted as a key tool for achieving policy goals in several EU policy areas and sectors. The Erasmus Programme for example has been extremely successfully in terms of its reach and impact on undergraduate students. According to the European Commission[32] 90% of EU universities take part in the programme and more than 2.2 million students have participated since it started in 1987[33]. The annual budget for the Programme is in excess of €450 million, with over 4,000 higher education institutions participating in 33 countries.[34]   The funding for Erasmus under the Lifelong Learning

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[30] Report of the High Level Expert Forum on Mobility: "Making Learning Mobility an Opportunity for All", European Commission, ec.europa.eu/education/doc/2008/mobilityreport_en.pdf

[31] See Workshop Reports at Annex 6

[32] European Commission (2007), Erasmus success stories. DG Education and Culture, p. 3.

[33] http://ec.europa.eu/education/lifelong-learning-programme/doc80_en.htm

[34] http://ec.europa.eu/education/erasmus/doc/stat/report0809.pdf

programme for 2007-2013 is estimated at some €3.1 billion[35] with a significant proportion (96%) of the budget being used to fund mobility actions.

Similarly, the Culture Programme has a total budget of €400 million for the 2007-2013 period and according to the current programme guide[36] approximately 77% of the total budget will be allocated to Strand 1, which is where the vast majority of the cultural mobility takes place, such as cooperation projects within the EU and with third countries, as well as support to festivals. It is clear that both these programmes, which are now well established, have established mobility as an important tool in achieving their aims and objectives.

Given the evidence concerning the benefits of mobility, the question then arises: what types of mobility might be most suitable to enable civil society to enhance its understanding of democratic processes and institutions and to engage with EU policy? To address this question, we first need to look more closely at the nature of CSOs and their activity; to assess what key features might influence the scope and nature of any EU support provided to them. Above, we have already discussed for example how EU support for mobility in the education and cultural sectors is strongly targeted and how certain programmes appear to have achieved significant impacts. We therefore need to consider the extent to which these lessons might be applied to the civil society sector.

3.3.2 Relevance to the target group

In the absence of large scale scientific evidence, and a commonly accepted method of categorising civil society, addressing the question of what specific features of the target group need to be taken into account in the context of support for mobility is problematic. At the same time, it would be an oversimplification to argue that all CSOs lack the capacity to engage with democratic processes and institutions and the EU in particular. We should also remember that this is not just a question of general capacity to engage: it also includes the ability of sectors to connect to the EU policy agenda, and this too will vary.

Three key dimensions of variation can help us to unpack this question: geography, policy domains and infrastructure (capacity and capability).

Geography

Civil society stands at various stages of development across the EU Member States, reflecting a variety of complex factors, not least countries' individual histories with respect to the role of the state. Data on this is rare, but Howard (2003)[37] has shown that the average number of organisational memberships per person varies from 2.62 in Sweden and 2.48 in Finland down to 0.45 in Lithuania and 0.36 in Bulgaria[38]. Perhaps one of the biggest cleavages in Europe is between post-communist countries and others. Post-communist civil society is 'distinctively weak, characterised by low levels of organised membership and

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[35] http://ec.europa.eu/education/erasmus/doc/stat/report0809.pdf

[36] Programme Guide: The Culture Programme 2007-2013

[37] Appendix B in Howard, *op cit.*

[38] It is interesting to note that in the USA – which has a small state-supported public sector - the figure reaches 3.59

participation by ordinary citizens[39]'. Indeed, citizen participation levels may even be declining, despite the increase that has taken place in the numbers of organisations.

However, there is an area where the merits of civil society organisations could be realised more fully in the future. In 2011 there were an estimated 11.9 million EU citizens living in another Member State and a Eurobarometer survey showed that many more people might exercise the right to freedom of movement with close to one in five Europeans (17%) actually envisaged working abroad in the future[40]. This may mean that support from CSOs which have some European experience or knowledge could facilitate and guide citizens moving to a new Member State either before they relocate or upon arrival.

Policy domains

The degree of engagement of civil society organisations with some EU policy fields is more long-standing than it is with others and some fields are characterised by more well-developed and highly organised third sectors. Whilst some organisations may be concerned directly with the issue of civic participation, it is more likely that they have some other central issue, e.g. the environment or the rights of minorities, around which they coalesce, and through which they pursue issues of participation. As Workshop participants emphasised, this complexity presents a challenge for any intervention at EU level, but it is essential that such intervention should be designed so as to appeal to civil society's particular (policy domain) interests – rather than directly in terms of civic participation.

It has not been possible to survey the entire range of civil society domains. We should, however, remind ourselves that this is a highly complex pattern and individual countries and civil society domains have their own particular sets of circumstances which account for whether they are well developed or still in their infancy. The factors accounting for variation in capacity are deeply rooted in the structures of societies. Not surprisingly, CSOs show significant variation in their ways of working, a point which has been highlighted by our research on the operational models.

In addition, we need to consider that this is not just a straightforward issue of capacity but of the appropriate type of capacity to undertake mobility and engage with the EU. CSOs typically struggle to secure long-term funding, and are very project based. This makes it hard both to find the resources to apply for funding and to release individuals for mobility schemes if successful. There is evidence that CSOs need the type of support available through, for example, Europe for Citizens points, in order to identify funding opportunities and make applications, although it was also stressed that NGOs tend to feel more confident engaging with other NGOs rather than with public sector bodies[41]. Many CSOs also have a need for comparatively basic information on the EU, a need, it was said, which was more extensive than commonly believed. This reflects the point made at the start of this chapter about the lack of connectivity with the EU of most of European civil society outside of EU-level organisations themselves.

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[39] Howard, *op cit,* p1

[40] Flash Eurobarometer 337 'Geographical and labour market mobility', November-December 2009.
[41] Stakeholder workshop

Infrastructure

'Capacity building' or 'organisational capacity building' is a term which has origins in the international development field, but which has also achieved general currency in a European context. Eade (1997)[42] describes it thus: *"...developing the capacities of organisations, specifically NGOs, so they are better equipped to accomplish the missions they have set out to fulfil".* By common agreement this includes the development of skills and capabilities that encompass, inter alia, a range of dimensions such as governance, leadership, administration and financial management, fund-raising, partnership working and networks. There is also a strong element of evaluation, reflection and continuous improvement through learning. Kaplan (2000)[43] argues that for an NGO to work efficiently and effectively in developing country they must first focus on developing their organisation.

It can certainly be argued that trans-national mobility, and in particular the exchange of knowledge and experience between civil society organisations, can contribute to strengthening the participating organisations, making them better placed to carry out their goals where these focus on particular aspects of citizenship, be it directly or indirectly. However we can also make a key distinction between capacity (something mobility can contribute towards strengthening) and capability (the extent to which CSOs are in a position to participate in mobility activity). For example, capability would include:

1. Weakness in respect of knowledge, information or motivation on the part of CSOs, which may limit CSOs' engagement with trans-national mobility;

2. Lack of own resources to participate in and manage trans-national mobility;

3. Lack of resources to secure external funding to support and manage mobility activity;

4. Lack of stable and widespread organisational infrastructures to provide a 'ready-made' platform for mobility (such as schools, higher education institutions etc.)

In light of these issues, in the next section we look at existing mobility schemes that can be accessed by the target group to develop their capability.

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[42] Eade, Deborah (1997). *Capacity Building: An approach to people centered development.* UK: Oxfam. pp. 35–36.

[43] Kaplan, Allan (Aug 2000). "Capacity Building: Shifting the Paradigms of Practice". *Development in Practice.* 3/4 10 (10th Anniversary Issue): 517–526

3.4 Assessment of current activity

3.4.1 Introduction

In this section we will consider existing provision to assess the extent to which the needs articulated are currently being met; and more specifically which needs are not being met.

Clearly it is not practical to provide an exhaustive review of all mobility actions. Rather, the focus is on identifying key features of different types of approaches. This also allows us to formulate a series of tentative general models, which we can take into account later on as we develop detailed operational options.

3.4.2 Overview of existing EU mobility schemes

The EU supports a number of programmes and actions which provide opportunities to undertake mobility periods abroad, but which differ significantly in terms of a number of dimensions: duration of the visit, target groups and stakeholders involved, and activities and purposes of the exchanges. An overview which attempts to highlight the key dimensions of each is provided in Figure 3.2, below (a more detailed overview is presented in the Annex 1).

This presents examples of mobility measures in different EU programmes, but it does not include support measures for the target group and international co-operation projects, even though they often include a certain degree of face-to-face or online based exchanges (we present the overview of the support measures for the target group in the following section). Nevertheless, some transnational projects include such activities as job-shadowing, study visits and other similar mobility related activities and therefore they are presented in the figure below. It does not provide exhaustive inventory of all the actions but rather illustrates different mobility schemes and actions that have been developed in the EU.

Figure 3.2 Overview of the mobility arrangements in the EU funded programmes
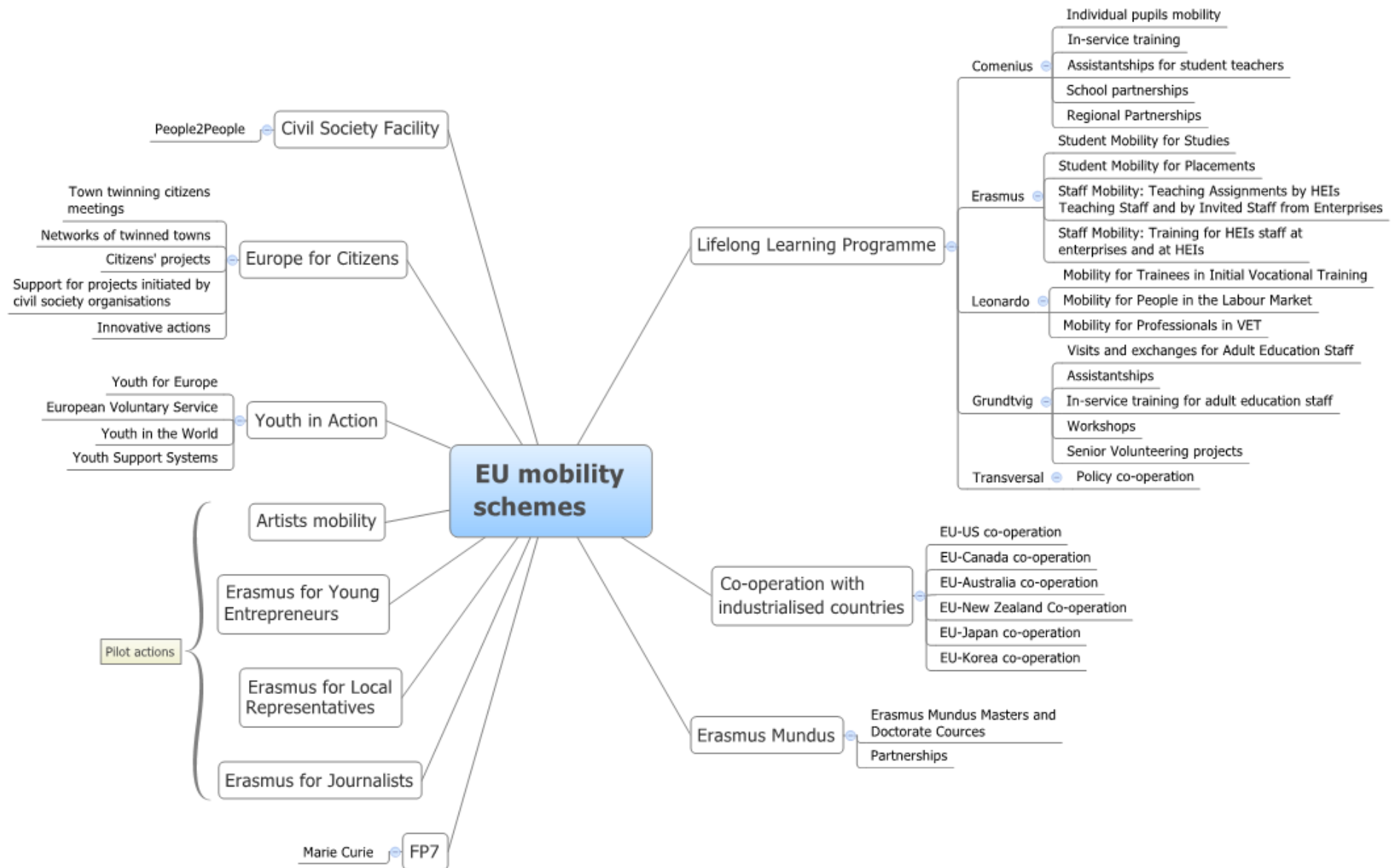
The figure above shows the wide range of tools and mechanisms used by European programmes. The list is not exhaustive and there are undoubtedly other mobility actions supported by the EU through other mechanisms e.g. ESF, FP7, ERDF, CIP and others. However, the schemes that are presented in the figure above are the most relevant to our target group and the sector. The mobility elements of Europe for Citizens are especially relevant for this study and presented in more detailed below. Similarly, the Youth in Action programme provides opportunities for civil society organisations active in the field of youth to take part in international mobility projects.

The main observations that emerge from this analysis are:

- There is a wide range in terms of the duration of the activities (from one day to several years). Another issue here concerns "dosage" i.e. taking into account not only the duration of mobility activity, but its frequency, continuity and context. The lessons from the evaluations of the above mentioned schemes show that on the one hand the professional benefits of mobility increase when the duration of the visit is longer term i.e. over 6 months, however, it makes it more difficult for those who have strong commitments (personal or professional) to take part in extended mobility periods.[44]

- The purpose of the transnational exchanges differs significantly between different programmes and schemes. However, most often the aims of the exchanges are linked to capacity building of organisations[45] with the focus on integration of the European dimension in institutional practices through increased international co-operation, adopting new work practices and methods identified in the other countries and improving quality of their core activities. Mobility also has a strong effect on the personal and professional development of the individuals involved, especially regarding so called "soft" skills such as increased confidence, initiative, language learning and intercultural understanding.

As illustrated in the figure above, mobility schemes are most well developed in the field of education and training. These address a wide range of stakeholders in this area and mainly contribute to international co-operation and enhancing the European dimension in the education and training. In addition, mobility is also supported in the field of youth and citizenship. This analysis raises the key question: what might the role of a similar European approach be in the citizenship field, and how might this be achieved?

A key aspect highlighted by the table at Annex 1 concerns the contrast between what may be termed thematic and non-thematic mobility activity (another way to look at this issue might be in terms of content-driven mobility and experience-driven mobility). This relates to the fundamental question of whether or not mobility is a 'means to an end', as opposed to 'an end in itself'. Certainly, in recent years a number of new mobility schemes devoted to exchanges and capacity building activities for specific target groups have been developed. Mobility schemes for elected local representatives, trade unions, journalists and even tourists[46] have also been initiated and are at different stages of development. This group of schemes share a number of common characteristics, including a relatively small-scale, discrete initiative aimed at a comparatively narrow target group of individuals (often professionals, multipliers or potential 'influencers').

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[44] WSF Economic and Social Research (2007), *Analysis of the Effects of Leonardo da Vinci Mobility Measures on Young Trainees, Employees and the Influence of Socio-Economic Factors.* Available at:
http://ec.europa.eu/education/pdf/doc218_en.pdf
[45] See Section 3.3.2, above
[46] http://www.euractiv.com/en/enterprise-jobs/eu-to-launch-erasmus-for-tourists-news-444230

Erasmus for Young Entrepreneurs[47] for example aims to generate a series of relationships between host firms and new entrepreneurs, offering flat-rate funding support to individuals and relatively modest grants to the intermediary organisations managing the mobility arrangements. This scheme is also characterised by a high degree of flexibility in terms of the 'project' that the young entrepreneur pursues and an emphasis on the high level of motivation of the potential participants.

At this point it is worth revisiting the conclusions of the High Level Expert Forum on Mobility[30]. In this context transnational **learning mobility** should be understood in a broad sense as a structured period of time spent in another country undertaken with a specific learning objective. It therefore goes beyond the kind of formal study supported through the Erasmus programme and includes informal learning and knowledge acquired through exchange of ideas with peers and volunteer activities.

Clearly, Europe for Citizens is the most relevant programme to our target group, providing support for various projects implemented by CSOs. The programme supports such activities as town twinning, citizens meetings, exchange of experience, training, conferences, workshops, support for the CSOs at European level, citizens' panels, projects initiated by CSOs, and high visibility events. In addition, the Innovative Actions measure was introduced to the programme in 2009 in order to test new forms of international mobility.

The next section looks at Europe for Citizens in more detail, focusing on the nature and scope of current support for mobility.

3.4.3 Europe for Citizens programme

The Europe for Citizens programme aims "...*to give the citizen a key role in the development of the European Union*"[48]. The programme runs from 2007 and 2013 and it has four action areas which provide strategic direction and funding. These are described briefly in the table below.

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[47] http://www.erasmus-entrepreneurs.eu/

[48] Europe for Citizens- Programme Guide – final version – March 2011

Table 3.1 Summary of elements of the Europe for Citizens programme

Action 1 - Active Citizens' for Europe	Aims to bring together people from local communities across Europe to share and exchange experiences, opinions and values. Specifically, Action 1 funds and supports four measures: Town Twinning, Citizens Meetings, Networks of Twinned Towns and Support Measures which includes exchanging of best practice and pooling experiences. Under Measure 2, Citizens Projects are transnational in nature and include elements of mobility.
Action 2 - Active Civil Society	Measures 1 and 2 provide operating grants[49] for European policy research organisations (think-tanks) and CSOs at European level (umbrella organisations, networks and organisations with a wide impact at the European level). Measure 3 supports projects initiated by CSOs from different countries on specific issues, which relate to the aims and objectives of the programme.
Action 3 -Together in Europe	Action 3 is about deepening the understanding of 'active European citizenship' with the aim of bringing Europe closer to its citizens. This is achieved through: 1) High-visibility events to raise awareness of the EU, designed to draw public and media attention across Europe and involve all those who wish actively to participate in a debate around it. 2) Studies which help the Commission to gain a better understanding of active European citizenship and related issues.
Action 4 - Active European Remembrance	Action 4 supports two dimensions: projects linked to the preservation of the main sites, memorials and documentary archives of Nazism, as well as events keeping alive the memory of victims; and projects which support the commemoration of the victims of Stalinism.

Source: Europe for Citizens- Programme Guide – final version – March 2011

The table above highlights the breadth of the Europe for Citizens programme: it includes a wide range of activities and initiatives, some of which have a mobility element, whilst other actions do not include any type of compulsory mobility and have quite a different focus, such as supporting organisations or preserving the memory of the past.

To ensure any proposed new intervention is complementary to the existing programme it is important to recognise the role that Active Civil Society (Action 2) currently plays. This action focuses specifically on CSOs and supports cross border cooperation projects such as joint actions, debates, reflection exercises and networking. Mobility is not the primary focus and opportunities to undertake learning mobility activities are rather limited.

3.4.3.1 *Innovative Actions (1.6)*

The Innovative Actions measure was a pilot action aimed at introducing mobility activities within the Europe for Citizens programme and encouraging innovative approaches to mobility initiated by CSOs. The general and specific objectives of the call for proposals for the measure are presented in the table below.

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[49] Grants amounting to a maximum of 80% of eligible costs, up to €100,000.

Table 3.2 Overview of the objectives of the Innovative Actions measure (1.6)

Overall objective
To test and develop innovative transnational exchange schemes with a view to building long-term partnerships between civil society organisations operating in different participating countries in the area of the 'Europe for citizens' programme.

Specific objectives
• Develop and test new forms of transnational mobility between civil society organisations. • Promote the concept of transnational mentoring between civil society organisations to support innovative project methodologies in relation to transnational mobility and mentoring between civil society organisations.

Thematic priorities
• Future of the European Union and its basic values • Active European citizenship: participation and democracy in Europe • Intercultural dialogue • People's well-being in Europe: employment, social cohesion and sustainable development • Impact of EU policies in societies.

Source: European Commission, Europe for Citizens programme, CALL FOR PROPOSALS — EACEA/15/2009

An overall budget of €1.1 million was made available and a call for proposals launched in 2009 (EACEA/15/2009)[50]. The size of the individual projects supported was between €75,000 and €150,000 and activities included mobility for members of staff, board members and volunteers of the partner organisations applying for funding. More specifically, the call for proposals targeted the following for support:

- mentoring on a one-to-one basis;

- the mentoring of groups of staff/volunteers; and

- exchanges of staff between the partner organisations.

Moreover, the call emphasised that projects should develop and apply <u>innovative methodologies</u> to mentoring and international exchanges, combining the face-to-face and online activities for example. Projects could be a maximum of 12 months in duration and had to start between 1st January and 31st March 2010.

Output data

Overall some 104 applications were received from CSOs for this measure. The total value of grants requested was for over €11 million. Nine projects were selected for funding after the assessment process, 17 applications were deemed ineligible and the remaining 78 applications were not retained for funding. Some 457 organisations, including the applicant and partner organisations, applied for funding from the Innovative Actions measure. A more detailed overview of the output data regarding Innovative Actions projects and applications is included in Annex 7.

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[50] European Commission (2009)*, Europe for Citizens programme, CALL FOR PROPOSALS — EACEA/15/200.* Available at: http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2009:176:0012:0015:EN:PDF

The high number of the applications, and of organisations involved in the projects proposed, shows that there is high demand among CSOs in Europe to take part in mobility-related activities and which are willing to explore innovative methods for implementing transnational exchanges within the context of the objectives of the Europe for Citizens programme. Moreover, the majority of the eligible applications contributed to the horizontal theme, '*giving citizens the opportunity to interact and participate in constructing a tighter Europe*'. It shows that there is a demand for activities that facilitate interaction between CSOs in Europe.

A wide range of organisations applied for the action including Europe-wide and national umbrella organisations active in different fields such as citizens' support, culture, community media, education, migration, equal opportunities, sustainable development, young people, social inclusion and social cohesion. Trade Union representatives also applied for funding to implement mobility projects between their member organisations.

Overview of the findings

From the evidence it might be argued that the Europe for Citizens programme already supports the types of activities implemented by the majority of Innovative Actions projects - activities such as meetings, training, workshops, conferences and round tables. For example, activities supported through Measure 2.3 *Support for projects initiated by civil society organisations* and Measure 2.2 *Structural support for CSOs at EU level* are similar to those implemented via many Innovative Actions projects. However three projects in particular piloted longer term work placements lasting around one month and providing the opportunity for staff members from the organisations involved to gain substantial experience of working abroad[51]. Certainly these medium and longer-term mobility activities are of particular interest and provide a basis for considering the development of wider mobility measure for CSOs.

Assessment of the activities supported under Innovative Actions suggests that the term 'mentoring' was not thoroughly defined. For example, the projects supported included a wide range of activities from face-to-face meetings, to workshops and conferences. However, the extent to which projects introduced innovative <u>mentoring</u> practices is not clear.

A review of the projects also shows that they are relatively large in size, although the number of participants directly involved in the mobility activities is relatively low, indicating that the cost-effectiveness of the measure in achieving its objectives was weak. This is partly due to the fact that each of the projects aimed to establish their own support structures for those who are mobile, such as conferences for beneficiaries, studies and research on mobility, and the selection of participants. However, the number of beneficiaries actually using these mechanisms was relatively low. This suggests that introducing common structures to support mobility for a range of different organisations would be beneficial in ensuring greater cost-effectiveness by providing wider opportunities for transnational mobility.

Most Innovative Actions projects were implemented by larger scale, well established umbrella organisations, several of which are also eligible to receive operational grants to implement similar activities. This must raise concerns about deadweight effects[52], where funding is provided to organisations for activity that would have occurred anyway (because it could conceivably have been

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[51] ETUC, the Active Citizenship Network, and Circles of European Integration.
[52] In effect 'non-additionality'.

funded from other sources), resulting in public resources being used inefficiently[53]. This was an issue also raised during the stakeholder interviews; although this may unavoidable, or justified for reasons of unrevealed demand (i.e. only projects that come forward can be funded).

Some of the projects emphasised the need to undertake research on issues relevant to mobility, including analysis of opportunities and barriers for transnational mobility. The experience gathered through these projects could be used as source material for CSOs that would actually undertake placement activity in future (the material could be included in the website dedicated to the new measure and partner search tool for example).

Based on our assessment of Innovative Actions projects, the table below sets out the lessons learned to start to identify some of the key features of a mobility measure for CSOs that would be cost-effective and have a high level of impact.

Table 3.3   Approaches to mobility provision within Europe for Citizens programme

Innovative Actions	New mobility measure
Support for projects to develop new forms of mobility.	Support for mobility activity itself (placement, traineeship, secondment).
Relatively small number of large scale projects.	Small amounts of funding applied to achieve specific outputs (take part in transnational mobility activity) provided to higher number of beneficiaries.
Focus on increasing the capacity of the existing networks and organisations.	Capitalises on existing capacity and capability to deliver scalable initiatives. The capacity of the organisations to apply is ensured through provision of preparatory grants for activities such as visiting potential partner organisations.
Focus on mobility as an object for research and analysis.	Focus on mobility as a practical experience for transnational cooperation.
Mix of the number of short-term exchanges supported by variety of online tools.	Participation in medium and longer term mobility periods (placements) supported by the online tools developed at the level of the measure (possibility to consider interactive applications within a website dedicated to the programme or the measure, presenting good practice examples etc.).
Match-making is to some extent 'internalised' at the project level.	Support for match-making is provided by the measure through an online tool and preparatory grants. However, ensuring the selection of the partner organisations for exchanges is the responsibility of the applicants (the assessment of the applications would take it into account).
The structure to support the mobility is developed at the project level.	The structure to support mobility is developed at the level of the measure.

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[53] However, we understand that as a result of a recent Structured Dialogue meeting held in the context of the programme, it was agreed that in the future organisations receiving operational grants will no longer be eligible for project grants under Action 2, Measure 3.

The new approach has some significant differences from the Innovative Actions measure and aims to focus more clearly on supporting longer-term mobility opportunities for the wider groups of organisations.

3.5   Conclusions on the need for intervention

In assessing the needs of the target group and defining the problem to be addressed, considering what objectives should be prioritised and what the scale and overall structure of any intervention might be, we can formulate the following conclusions:

- The target group is potentially very wide, but a set of common needs can be identified concerning administrative capacity, capability, better information etc.

- These sector needs are very relevant to overarching EU policy 'needs', in terms of mobilising the skills and experience of civil society in moving forward the new Europe 2020 strategy.

- Mobility is a key tool for achieving policy goals across a whole range of EU policy areas and sectors, but although a very wide range of schemes is supported by the EU, none currently fully meets the demand from civil society organisations. The potential contribution from civil society organisations is considerable, but there are fewer mechanisms through which to channel effective support compared with other sectors.

- The scale and overall structure of any intervention will need to be tailored to the specific features of the target group – for example given the diversity of interests the objectives will need to be established to be both broad (in terms of thematic coverage) and narrow (in terms of specific activities that civil society organisations have the capacity and capability to respond to).

- The Innovative Actions measure has provided some valuable lessons on improving the impact of CSO mobility – however a more systems-based approach, with a strong practical focus is likely to be more cost-effective in achieving the scale and impact required.

- The European Added Value of the intervention would be in terms of benefits to the EU as a whole, strong contribution to achieving strategic EU objectives of engaging citizens, as expressed in the Europe 2020 Strategy, and unlocking CSO capacity to increase networking effects, knowledge sharing and the scale and quality of learning mobility activity.

4.0 Aims and objectives of any new intervention

4.1 Introduction

Having established a strong basis for intervention we now start to construct a detailed intervention logic that links the problems identified in the previous chapters to the objectives of a potential intervention. The overall approach to developing a hierarchy of objectives is based on the standard EU Impact Assessment Guidelines[54] and DG BUDG evaluation guidelines[55].

The framework for the development of hierarchy of objectives is presented in the figure below.

Figure 4.1 The DG Budget model for an intervention logic
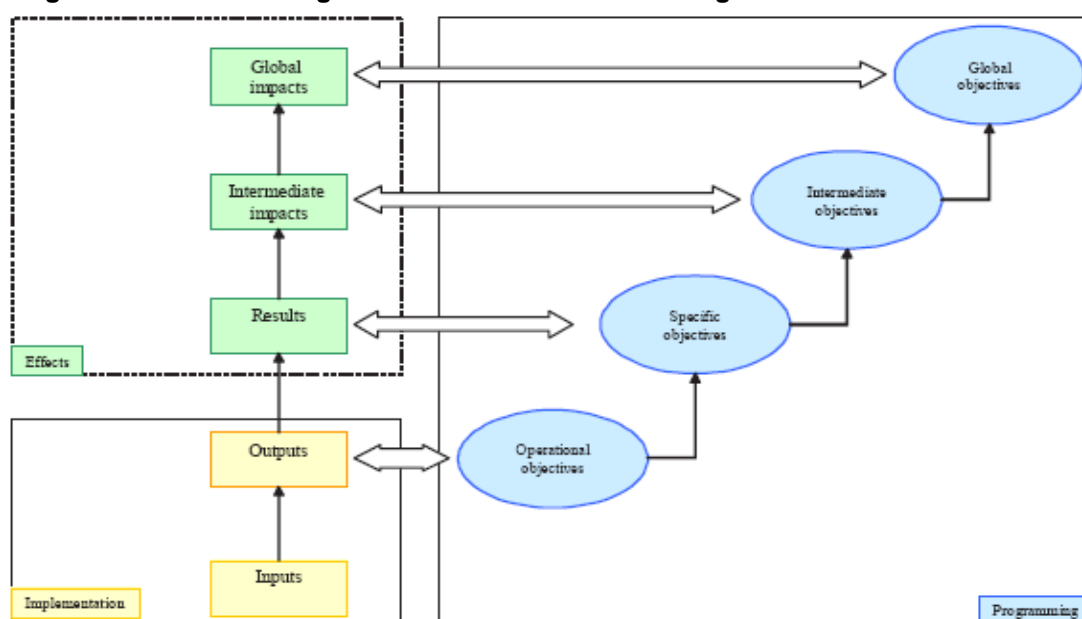
Source: European Commission, "Evaluating EU Activities. A practical guide for the Commission services", July 2004, p.71.

Under this model clear links are established between high-level global and intermediate objectives (generally reflecting wider policy goals) and specific and operational objectives at the level of the intervention itself. A hierarchy of objectives is proposed on three levels:

- Overall objective;

- Programme objectives (specific objectives); and

- Project specific objectives (operational objectives).

We will now consider each of these in turn.

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[54] http://ec.europa.eu/governance/impact/index_en.htm
[55] http://ec.europa.eu/dgs/secretariat_general/evaluation/docs/eval_activities_en.pdf

4.2 Hierarchy of objectives

4.2.1 Overall objective

Overall Objective
To ensure European Added Value to citizenship through increased awareness, identity and engagement with the policy making processes at the European level.

This Overall Objective reflects the primary purpose of the intervention to which the specific and individual project-level objectives must contribute. Activities should all be able to demonstrate how they contribute to the attainment of this objective[56]. This is the high-level objective, embedded in Europe 2020 for example and in the fundamental building block provided by citizenship of the EU.

4.2.2 Intermediate Objectives

Intermediate Objectives
• Enhancing the understanding of democratic processes and institutions; • Enhancing engagement with specific EU policy areas - for example Europe 2020, Environment and climate change (to be determined by the Commission); • Enhancing the capacity and capability of CSOs; • Connecting EU level and national/regional/local CSOs; • Promoting and facilitating informal learning; • Promoting and facilitating mutual exchange of knowledge and intercultural dialogue.

The Intermediate Objectives as defined must contribute to the Overall Objective above and link to the Specific Programme Objectives, below. The Intermediate Objectives reflect the broad goals of the Overall Objective and represent the types of opportunities that need to be provided in order to make progress towards achieving it. The Intermediate Objectives focus on dimensions where mobility in particular can make a significant contribution - by bringing people together, to engage with each other and with the EU, and foster an enhanced sense of belonging to the European community. This latter element is central to most successful mobility schemes and also lies at the core of the proposals made in this report.

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[56] The overall and specific objectives as outlined are draft

4.2.3 Specific Programme Objectives

Specific Programme Objectives
- Increase inter-thematic and inter-organisational interaction, notably practical experiences;   - Widen the range of civil society participation, in particular through increased networking of national and regional level organisations;   - Promote policy agenda and recognition of civil society's contribution.

For CSOs the limited resources available to prepare applications pose a challenge. There is therefore a need to manage demand better and avoid the inefficient use of these scarce resources. One way to do this (i.e. reducing the number of high quality, unsuccessful applications), is to focus calls for proposals on more specific sub-objectives, derived from the programme objectives set out above. These should be reasonably narrow and specific; and might for example be based on a system of 'windows'. This also has the potential benefit of allowing the Commission to identify and respond more quickly to emerging policy issues.

4.2.4 Project Specific Objectives

Project Specific Objectives
Each project proposal will include objectives that must demonstrate how the activity will help attain the programme objectives described above.

Project applications must provide information to demonstrate how this will be achieved. All activities would have to relate to one of the four Specific Programme Objectives set out above. Project Specific Objectives must also demonstrate their compatibility with the core activities and functions of the applicant organisation. This is important to ensure:

I. Maximum added value – organisations building on and/or unlocking existing capacity;

II. Dissemination and multiplier effect for information – organisations are already networked and connected in fields relevant to the topic;

III. Sustainability – the project results are much more likely to be sustained if related to the participant organisations' core objectives and activities.

4.3 Intended effects of the intervention

The diagram below takes the hierarchy of objectives developed above and adds a series of tentative intended effects, reflecting the types of benefits any potential intervention might be designed to deliver.

Figure 4.2 Intervention and intended effects

Overall Objective
To ensure European added value to citizenship through increased awareness, identity and engagement with the policy making processs at the European level

Intermediate Objectives
- Enhancing the understanding of democratic processes and institutions
- Enhancing engagement with specific EU policy areas
- Enhancing capacity and capability of NGOs
- Connecting EU and national/regional NGOs
- Promoting and facilitating informal learning
- Promoting anf facilitating mutual exchange of knowledge and intercultural dialogue

Specific Programme Objectives

Increase knowledge sharing through inter-thematic and inter-organisational interaction

Widen the range of civil society participation, in particular through increased networking of nation al and regional level organisations

Promote policy agenda and recognition of civil society's contribution

Outputs
- Mobility Activities
- Support Structures
- Information Systems

Intended effects
- Stronger civil society organisations
- More engaged civil society organisations
- More vertically integrated civil society organisations
- NGOs that better reflect the needs of citizens
- Citizens benefit from more channels to EU policy making
- Increased relevance of Europe 2020 Strategy to the civil society and the general public

5.0 Design factors for effectiveness and feasibility

5.1 Introduction

This section sets out the factors to be taken into account in designing an intervention that is both (a) effective for the target group(s) concerned and (b) feasible in a practical sense in the light of EC funding and administrative frameworks. It draws on chapter 2 and 3 where the key features shaping demand were described and on views of stakeholders as an input to our own analysis and on lessons from other programmes and operational models.

The key questions considered in terms of effectiveness and feasibility are:

- The nature of the target groups;

- Types of activity that target groups are capable of participating in (including the issues of scale);

- Level and type of funding needed (lack of funds in the 'sector') - given the nature of the constituency of interest, funding issues have a critical bearing on the types of activity that would be viable and most beneficial for the sector and thus on the overall programme structure;

- Level and type of support needed - participants are likely to need various types of support; a separate issue from the question of the overall architecture of the intervention;

Together with the objectives established in the previous section, we can use these to construct the following overall indicative model:

Figure 5.1 Indicative operational model for a CSO mobility scheme

Overall Objective	Target Groups	Activities
To ensure European added value to citizenship through increased awareness, identity and engagement with policy making processes at the European level.	• CSOs operating and registered in Member States (or third countries as appropriate), including NGOs, social partners and consumer organisations, and community-based organisations	• Preliminary activities • Mentoring • Study visits • Placements and exchanges • Information and guidance
Intermediate Objectives • Enhancing the understanding of democratic processes and institutions • Enhancing engagement with specific EU policy areas – e.g. Europe 2020, environment and climate change (to be determined by the Commission) • Enhancing the capacity and capability of CSOs • Connecting EU level and national/regional/local CSOs • Promoting and facilitating informal learning • Promoting and facilitating mutual exchange of knowledge and intercultural dialogue	• CSOs whose core function will permit them to contribute to the programme objectives (not only those working in the field of civic participation) • Organisations with strong direct links to citizens • CSOs offering the best potential multiplier effects • Not-for-profit basis, normally excluding businesses from receiving funding • Professionals (e.g. journalists) • CSO staff and volunteers • Individual citizens, via relevant organisations	
Specific Programme Objectives • Increase inter-thematic and inter-organisational interaction, notably practical experiences • Widen the range of civil society participation, in particular through increased networking of national and regional level organisations • Promote policy agenda and recognition of civil society's contribution		

Our approach sets out a model which is rigid and focused in terms of the overall objectives and programme level objectives, but allows appropriate flexibility in how these objectives are achieved through specific activities. It also places a deliberate emphasis on the importance of mobility actions attaining outputs and results; and on the need to define these explicitly at application stage.

In the next sections we will now look in turn at each of the key design factors, drawing upon evidence from stakeholder consultations, workshops and investigations of a range of current schemes to assess key factors that will influence the effectiveness and feasibility of any new scheme.

In particular we reviewed a number of mobility schemes across a wide range of sectors to learn lessons about how they way these are designed and implemented can indicate how any new intervention might be designed. These were:

Mobility Programmes
International
• Nordic-Baltic Mobility Programme for Public Administration
• Nordic-Baltic Mobility and Network Programme for Business and Industry
• Nordic-Baltic Mobility Programme for NGOs
European Union
• Grundtvig UK National Agency
• Marie Curie Fellowships
CSOs
• Eurochild
• European Association of Development Agencies
• The Pan Cyprian Volunteerism Coordinative Council
• South West Trade Union Council, UK
Private Sector
• ACARDIS
• German Automotive Sector (Bentley)
• Airbus
National/Regional
• Centre for International Cooperation & Mobility - Austria
• Flemish Government Educational Exchanges
• Dutch Ministry of Internal Affairs
• Project Manager Development Department Ludza Municipality, LATVIA
• Local Development Consultant, Bourgas, Bulgaria
• RUHR 2010 - TWINS Project

Summary tables for these schemes are annexed for reference (Annex 2). The learning they have provided is incorporated into the following sub-sections.

5.2 Target groups

Here it is useful to re-state the definition of the term CSO already discussed in the introduction to this report[14], where 'CSO' may be used as shorthand to refer to a range of organisations which include:

Labour-market players (i.e. trade unions and employers federations – "social partners"); organisations representing social and economic players, which are not social partners in the strict sense of the term (for instance, consumer organisations); NGOs (non-governmental organisations), which bring people together in a common cause, such as environmental organisations, human rights organisations, charitable organisations, educational and training organisations, etc.; CBOs (community-based organisations), i.e. organisations set up within society at grassroots level which pursue member-oriented objectives, e.g. youth organisations, family associations and all organisations through which citizens participate in local and municipal life; and religious communities.

As discussed in Section 2 above, the potential target group for any new intervention in the Europe for Citizens programme is vast and the task of defining a target group is further complicated by the variety of types of organisation and structures within the sector, unlike in the education sector for example, where many current mobility programmes focus and which benefits from a certain degree of common structures and systems.

The civil society sector in the EU is broad and very diverse, with its constituent organisations ranging from national and international NGOs and trade unions to special interest groups which may operate on a very local level and which may never anticipate engaging on a European level. Therefore, for the purposes of this study it was important to unpack the term 'target group' in order to determine which sectors should be prioritised, for any new intervention in this field. In Section 2 we described two key dimensions of variation - geography and policy, concluding that for some policy domains, in some countries, civil society will face challenges. For example civil society in post-communist societies within the EU, has a shorter history than it does in Western Europe and particular policy areas are therefore in their infancy.

At this point it is important to consider the scope and nature of the civil society sector, and therefore the potential target groups that are the subject of this study. It is clear that there is a spectrum of civil society actors, some which have strong capacity; others which are weaker. Within the sector there is also an issue of the scale of intervention i.e. for key EU priorities, such as regional policy and environmental policy, the level of interaction amongst CSOs and between CSOs and the EU is already well established. However, in some EU policy areas it is clear that there is less interaction between CSOs and the EU, although there is still interaction <u>between</u> CSOs; and this is the key to increasing capacity in areas where it is weak, (for example through CSOs supporting each other to raise capacity, particularly those who are already engaged at an EU level). This should promote a 'filtering' effect, with knowledge, experience and capacity being passed between CSOs thereby increasing capacity and civic participation on an EU level.

With the broad framework for the target group having been described above, it is now important to consider some of the more specific parameters of the target group. A number of key messages emerged from the individual stakeholder consultations and the workshops, which help us to refine the target group still further.

Not for profit

During the first workshop it was confirmed that for the purposes of this study, and the operation of any potential future programme, that participant organisations had to operate on a not-for-profit basis, therefore normally excluding businesses. However, where businesses or sector bodies were engaged with issues of general interest (for example via Corporate Social Responsibility) rather than simply engaging in furthering the interests of their own company or sector, then they might be eligible.

Multiplier effect

At the same workshop where target groups were an important topic for discussion, the idea of multipliers in society was raised. The Erasmus for Journalists programme is an obvious example of this, whereby journalist were given the opportunity to take part in a mobility programme in order to understand other European countries and cultures better, with the hope that they would pass this knowledge and experience on through their journalism. Some CSOs, particularly those at a European or national level, are also able to have a multiplier effect by working with other CSOs with lower capacity and/or intensity of engagement with the EU, particularly those at a regional or sub-regional level, or those in countries where civil society in certain policy areas is less well developed. This issue is key to meeting the objectives of this study and the broad objectives of the Europe for Citizens programme in maximising the potential of mobility in increasing civic participation.

Connecting CSOs

The lack of connection between large, EU-level CSOs and smaller, national CSOs was highlighted and discussed at the second stakeholder workshop. There is an information deficit about EU policy developments and activity seen from the perspective of local, regional and national CSOs. This raises the potential that a new scheme might have to support exchanges between these levels. This would strengthen dialogue, but is currently a challenge to implement since a project is needed as a vehicle or it has to be funded out of the ad hoc use of core funding for the CSO organisations.

Focus of theme or activity

Another point raised by stakeholders was that it was difficult for individuals to participate in schemes without having a focus or theme (such as being a lawyer or trade unionist) as this would make programmes unmanageable. For individuals to participate it must be ensured that they are contributing to the development of the organisations and/or the sector as well, and this is likely to be through a focussed theme or activity. One CSO interviewed who supported this view said: "…*it is important that the participant be focused on an activity which is pertinent to him, and which he knows beforehand ('knowing what is done at home to be able to understand and draw comparisons')*".

Learning for the target group

The proposed 'ERASMUS for Journalists' action, currently being evaluated by DG Information Society and Media provides an interesting example. Research on the feasibility of this initiative indicates that for potential participants the demand is primarily for opportunities to learn about different people, their culture, life and traditions; secondly for the professional element of exchanges and finally for learning more about EU institutions. This provides an interesting perspective, where although initiatives focus on a quite specific target group, the desire for exchange and exposure to people and contexts different to

one's own is at least as strong as the desire to engage with fellow professionals. Targeting specific groups of participants may therefore be conceptually less important than the underlying and fundamental drivers of informal, cultural learning. Grouping by profession or any other criteria may simply be a means to define a client group for operational purposes, while giving an initial and sufficient degree of compatibility to ensure some common ground for engagement. This also seemed to echo the experience of the trade union sector.

Importance of objectives

At the second stakeholder workshop held in February 2011 the importance of objectives and target groups was discussed. It was agreed that the starting point in terms of the orientation and scope of any new mobility-related measure must be that the aims of the activity is aligned to the core work of the organisation (and individuals) involved. At the same time, to ensure added value at the European level, the overarching goal must remain firm – to encourage and promote ownership of democratic institutions and processes, increase direct participation and foster an EU 'public sphere'.

Conclusions regarding target groups

The effectiveness of any intervention will be enhanced by the following key features:

- Participation in the programme or action should be primarily via organisations.

- Any intervention must be designed to appeal to a range of civil society interests, not just those organisations who work in the field of civic participation.

- The chosen target groups must ensure maximum benefits in terms of increasing civic participation (therefore engaging with CSOs that have the potential to be multipliers).

- Participation must show how it will contribute to the overall and sustained development of the organisation and the sector concerned (allowing for a degree of flexibility in interpretation) and in the case of non-professionals (e.g. citizens, volunteers etc.) what benefits it will bring.

- The importance of informal cultural learning for the target group as part of the structured mobility scheme, as a means of building European identity and promoting civic participation should not be underestimated.

- The need to broaden opportunities to include a wider range of organisations at national and local / regional level should be recognised.

- Applications from participants across sectors (e.g. between CSOs and local government) and between levels (such as local / regional and EU) and between policy areas (for example gender equality and the green economy) should be encouraged to make better use capacity for the future and to "add value" to the policy framework.

- **Broad definition:** CSOs operating and registered within EU Member States (or third countries where appropriate).

- **Operational definition:** CSOs where core functions will permit a contribution to the overall and programme objectives above (flexibility in interpretation).

5.3 Activities

We have already addressed the question of whether mobility activity can be used to develop European identity and citizenship agendas, and the evidence certainly indicates that this is the case. As also described in previous sections of this report, the term mobility encompasses a large and diverse range of meanings and activities.

One of the key research questions for this study therefore concerns what types of activity the target group is capable of participating in, as well as what types of activity are most likely to be effective in terms of the impact they will have on the strategic policy objectives of building European identity and promoting civic participation. To put this in another way: what types of mobility-related activities offer the most effective means to exploit the potential of civil society organisations to contribute to EU policy objectives (or which types have tangible and long-lasting impacts)? A subsequent question which naturally follows concerns the type and scale of activity that the EU can and might support (i.e. according to available resources and financial regulations). We must therefore consider types of activity, together with the capacity to drive such activity forward, on the scale required.

Evidence from stakeholder organisations and from bodies managing mobility schemes suggests a very wide range of durations for mobility activity. Two initiatives run by the Flemish Government offer short term exchanges between schools lasting for a minimum of three (GROS) or six days (EUROCLASSEN). EURADA (European Association of Regional development Agencies) undertakes a range of informal exchanges and interactions as well as organising three large events per year. The Nordic Council of Ministers Nordic-Baltic Business and Industry Programme funds mobility periods of one to two weeks, reflecting the difficulty that releasing staff for long periods poses to the participating businesses. Another Nordic Council scheme, the Programme for Public Administrations defines the length of the mobility period as no less than three days, with average stays working out at between three and five days. Looking at mobility schemes run by large European businesses, we find that placements at company locations elsewhere in Europe can last for periods of one week to several months, or even years. In a commercial setting, mobility parameters are largely demand-driven, based on a combination of the needs of individual employees, skills gaps, strategic changes, expansion or specific development projects. Staff must typically work to agreed learning and development objectives. A number of evaluations point in particular to duration of the visit. A recent study on the effects of Leonardo on young trainees and employees[57] found that the benefits to the employers increased when the duration of the placement was longer. Another study on the Impact of Comenius Assistantships also found that there were disadvantages when the mobility period was short and that having flexibility in setting the duration of the mobility is an advantage.[58]

This evidence suggests that participation rates are likely to be greater if flexibility is allowed according to specific needs of organisations and individuals; and 'demand-driven' mobility takes place within specific contexts and has straightforward learning or knowledge-exchange goals. A common theme that also emerges is one of sharing experience in areas of common interest – defining mobility by individual target groups (e.g. Erasmus for Journalists, Young Entrepreneurs etc.). This has the advantage that the activity

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[57] Analysis of the Effects of LEONARDO DA VINCI Mobility Measures on Young Trainees, Employees and the Influence of Socio-economic Factors. WSF Economic and Social Research 2007

[58] Study of the Impact of Comenius Assistantships by GES and ZSB 2010

becomes 'self-defining' in the sense that the learning goal is obvious. In the same way, targeting an initiative at CSOs might follow the same logic, except, as we have already seen, the civil society sector is heterogeneous along several different dimensions. In wishing to support mobility activity, we therefore need to identify common goals, but allow flexibility in choice of activity that suits the specific needs of a variable target group. This implies defining the eligibility of potential participants in terms of the core objectives and values of applicant organisations and the strategic fit with EU policy priorities. This kind of flexibility should offer the opportunity for a wider group of stakeholders to engage with an initiative, but also implies a strong emphasis on results (in line with the rationale of learning mobility, as described in Section 3, above).

One of the key characteristics of current provision is the relatively stronger provision of systematic and longer-term mobility activity in the education, research and culture fields: Erasmus, Marie Curie etc; together with the emergence of a new type of very targeted pilot schemes, which borrow heavily from perhaps the best known of all EU mobility scheme, Erasmus. Shifting the focus to core thematic objectives, the quality of the ideas proposed, with an emphasis on interaction and dialogue with clearly identified learning outcomes and away from 'project-based' approaches (where mobility activity is sometimes only a small part of the overall), is more likely to be effective. In this context placements would appear to offer the best prospect for making an impact; one which is scalable in the longer-term and offers a step-change in the nature and scope of support offered in the sector. Crucially, we have seen that while there are a number of routes available to CSOs and other stakeholders to access a range of short-term trans-national experiences (e.g. conferences, study, visits, training and so on), there is a significant gap in terms of mobility of sufficient depth and duration to bring about a lasting impact.

A significant element of funding provided through any new mobility measure must depend on the attainment of outputs (numbers of individual and organisational beneficiaries); as well as results attained by the end of the project, (here this might be direct – sustainable knowledge-sharing partnerships between organisations- as well as indirect, such as increased level of understanding of EU policy processes, or better understanding of good practice in a specific policy area). It is unlikely that longer term impact can be evaluated or measured effectively within the lifetime of a project; but indicators and explanations of links to achieving this should also be requested from applicants.

5.4   Level and type of funding

The case studies and other aspects of the assignment suggest a number of areas that need to be reviewed in terms of levels and types of funding. These have to be interpreted in the light of the existing Financial Regulation that governs EU spending as well as in the light of resource constraints which need to be balanced by scale-effects

Firstly, many stakeholders consulted emphasised the considerable benefits and added value that can be generated for an organisation through easy access to **small-scale funding for an initial or exploratory mobility experience**, which in some cases may lead to more substantial activities. In other cases, would-be participants had been deterred by what they perceived to be overcomplicated payment procedures, especially where only small amounts of finance were sought.

In some of these cases (e.g. UK SW TUC, University of Thessaloniki, Greece) own resources were used, but the scope of co-operation was still restricted through lack of funding. This point was made, for

example, by EURADA (an organisation based in Brussels, but covering all Member States) which has managed exchanges between regional development organisations for more than 20 years. The Future of Europe Association (Hungary) receives only a small amount of funding to cover certain core costs and this enables much wider-scale events for young people from across the EU to take place, drawing on local and in-kind resources. The small municipality of Ludza (Latvia) succeeded in participating in one small-scale mobility project and has now engaged in a range of trans-national activities as part of its development strategy. This evidence suggests that priority should be given to facilitating easy access to small scale "seed" funding for organisations new to EU level activities or engaging in a new area of EU policy for the first time. An amount of €10,000 might be considered as a maximum for this. Such a facility would have considerable European Added Value and also directly benefit the participating organisations. At the same time, clear pathways to sustainable engagement, where appropriate, need to be visible and accessible.

The possibilities of **front loading payments**, through provision of a high percentage of funding at commencement of the activity, are already used whenever the financial capacity of beneficiaries allows this. Smaller would-be participant organisations in particular find that the need to allocate funding for start up activities is a significant barrier. Problems here included the availability of resources, the opportunity cost of the resources needed and the cash flow implications. The Nordic Council, for example, pays 85% of funding up front, which eases cash flow burdens on recipients but has the unintended effect that something like 20% of beneficiaries fail to submit final reports.

A further area for consideration would be **greater flexibility concerning the use of funding** in relation to specific types / categories of expenditure and specific pre determined unit costs. This can impose serious administrative burdens on beneficiaries. Grundtvig partnerships, for example, are currently facilitated by a lump sum which is a simple payment making fewer administrative demands on the beneficiary organisation. The SW TUC in the UK provided an example where the funding requirements of EU funding were 'too inflexible' for their work with Polish partners concerning the rights of migrant workers due to the rapidly changing circumstances. Their view is that applicants should only be required to provide indicative allocations of costs between broad headings with their own self justified unit costs, although this might conflict with the accountability for actions carried out. Certain types of cost could also be prohibited (for example, purchasing of vehicles). In the case of the Gross – Euroklassen initiative funded via the Flemish Government in Belgium, there is no need to provide receipts or proof of individual items of expenditure, but only that the activity itself (for example a visit) took place successfully. The emphasis should shift to results or output based funding with expenditure justified in relation to generation of agreed outputs and results.

Further, **access to funding should also be made easier and more flexible** through a demand focussed approach. In many cases, would-be beneficiaries find the use of an application procedure which revolves around very restricted calls for proposals with infrequent windows (for example on an annual cycle), a potential barrier due to the need to allocate resources for preparation and the need to respond to events and opportunities. Instead, an open access programme or alternatively the use of frequent application "windows" would overcome this problem. Of course it is recognized that the need for this from the beneficiary viewpoint must be balanced with the capacity and processes of the Commission services needed in handling applications. The windows could focus on specific sub objectives of the programme which would facilitate ease of processing applications and would also deter large volumes of high quality but unsuccessful applications. The high percentage of unsuccessful applications (of acceptable quality) for some mobility schemes (e.g. the EU Framework Programme for research) was also cited as a barrier

for some potential participants, due to the need to justify the allocation of capacity for preparation of applications with a high risk of failure.

Conclusions regarding level and type of funding

- Payment could include an up-front payment since many CSOs at Member State and local / regional level find the payment regime a barrier to participation. However, a significant proportion should be held back and paid only where outputs and results are attained. An allocation of 50% on contracting and 50% on completion, as currently provided for within the Europe for Citizens programme, would achieve an appropriate balance, without introducing any undue risks.

- Application process to be through frequent windows related to specific sub-objectives of the programme objectives set out above. Use of simple forms with tested guidelines and on line access should be favoured.

5.5 Level and type of support needed

Information and support for the beneficiaries is one of the important elements for all the mobility schemes analysed in the course of the study. It includes such measures as dissemination of information about the programme, support for the partner search and guidance in writing the applications. Each programme includes a different set of support measures, ranging from helplines and direct counselling to complex databases accessible to the beneficiary groups as well as evaluation of successful projects. It largely depends on the management and administrative structures of the programmes and financial resources available. In the context of any proposed new mobility measure foe CSOs we now focus on information and support measures specifically.

The promotion of the programme and dissemination of information is the responsibility of the bodies managing and implementing programmes. At European level information on mobility schemes is normally provided either by the European Commission or by the agencies specifically responsible for managing EU funded programmes such as EACEA[59] in the field of education and culture, REA[60] in the field of research, and TAIEX[61] providing technical assistance and information support for DG Enlargement funded activities. A different model is developed for the Erasmus for Young Entrepreneurs programme, where European Association of Chambers of Commerce and Industry EUROCHAMBRES is the Support Office at European level and therefore has responsibility for promoting the programme.

Information at national level is either provided by bodies responsible for management of the programme or it is provided by designated organisations. For example, National Agencies of the Lifelong Learning Programme (LLP) are responsible for overall management of the programme at national level including promotion of the programme and encouraging potential beneficiaries to apply for it. The Cultural Contact Points that are supporting the European Culture Programme[62] are mainly responsible for promoting programme among the local stakeholders and supporting potential beneficiaries in preparing applications.

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[59] The Education, Audiovisual and Culture Executive Agency

[60] The Research Executive Agency

[61] The Technical Assistance and Information Exchange Instrument

[62] http://ec.europa.eu/culture/our-programmes-and-actions/doc411_en.htm

The main tools that have been identified during the study for the promotion of the programme are dedicated programme websites, newsletters, information days, meetings with the potential beneficiaries and printed material. All the programmes studied use the mix of the tools for promoting the programmes depending on the funding available and the needs of the target group.

Building partnerships among the organisations in different countries is one of the key dimensions in developing international exchange projects. The importance to the success of mobility projects of matching participants effectively is recognised in recent evaluations of mobility schemes such as Comenius Assistantships[63], and Leonardo da Vinci mobility measures[64]. A wide variety of practices has been put in place regarding support for the partner searches, ranging from the extensive databases to providing the possibility to meet partner organisations face-to-face. An overview of the tools and practices that have been developed in this respect, at European as well as national programmes, is now presented.

Online Databases

A majority of European mobility programmes have established online platforms for partner searching. They vary significantly in terms of the level of detail of the information available and the scope of activities that they support. For example, some of the databases provide not only information on mobility opportunities, but also practical information on living in different European countries such as accommodation, social security and legal regulations and health provision. Others are devoted specifically to finding partner organisations for specific programmes. For example EURAXESS is the extensive database for mobile researchers. It provides a wide range of material, from general information on different countries to specific job opportunities, accommodation, social security systems, taxation etc. E-Twinning is a tool that has been developed for the Comenius programme and it is an online platform for teachers in the LLP countries to find partners, exchange experience and develop online based projects.

The other example is Erasmus for Young Entrepreneurs programme. The dedicated website is created for potential beneficiaries to register their interest in the programme and find partners for exchanges[65]. Only those who are registered and approved by the Intermediary Organisation based in the country of the applicant are able to access the profiles of potential partners.

Intermediary organisations

The Intermediary Organisations or National Agencies in the Member States often help the organisations or individuals to find the partners. For example, in the Youth in Action programme, national agencies provide information on the organisations that would like to build partnerships abroad. Similarly in the Erasmus for Young Entrepreneurs programme Intermediary organisations are responsible for facilitating the building of links between new entrepreneurs and host entrepreneurs.

The stakeholder interviews identified that European Trade Union Confederation (ETUC), which is running Erasmus for Trade Unions programme, is responsible for linking the host and sending organisations.

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[63] Maiworm, F, Kastner, H, Wenzel, H (2010), *Study of the Impacts of Comenius Assistantships.* Available at: http://ec.europa.eu/education/more-information/doc/2010/comeniusreport_en.pdf

[64] WSF Economic and Social Research (2007), *Analysis of the Effects of Leonardo da Vinci Mobility Measures on Young Trainees, Employees and the Influence of Socio-economic Factors.* Available at: http://ec.europa.eu/education/pdf/doc218_en.pdf

[65] http://www.erasmus-entrepreneurs.eu/

They receive the applications from all interested parties and facilitate partnership building between those who express similar interests.

The People2People programme implemented in the framework of DG Enlargement activities provides the opportunity for civil society organisations in the candidate and potential candidate countries to take part in a study visit. The selection of participants in the study visits is the responsibility of DG Enlargement itself, with the help of EC Delegations in the relevant countries.

Face-to-face meetings

The Lifelong Learning Programme has developed several measures providing the opportunity for the potential beneficiaries of the programme to meet face-to-face in order to establish project partnerships. The measures available include Contact Seminars and Preparatory Visits. Contact Seminars provide the opportunity for potential beneficiaries to take part in 3-5 days workshop that aim to help potential partner organisations to get to know each other and discuss project ideas. The Preparatory Visits provide a grant for a member of the organisation to visit a prospective partner in order to discuss their project and prepare an application.

In addition to the support measures for the prospective beneficiaries to build the partnerships, some countries have developed separate schemes that support smaller scale projects and facilitate organisations to establish international links and implement smaller scales projects. For example, the Flemish Government is supporting such schemes as GROS and Euroklassen that are targeting secondary schools and provide the opportunity to obtain funding for cooperation projects that involve short term mobility periods. The programmes support international exchange projects between two schools. It provides the opportunity for schools that have not been involved in international cooperation previously to gain experience of implementing international projects at a much smaller scale. They might then be interested in developing bigger projects under LLP.

Observations:

- The success of mobility projects strongly depend on success in matching participants. The better the needs and interests of all those involved correspond, the higher the impacts of the mobility.

- Mobility programmes include a mix of tools for partner search that complement each other.

- Online tools for partnership building form a part of most of the programmes. They range from the online database specifically dedicated to bring the potential partners together in the framework of specific programmes, to information tools covering a wide range of issues from mobility opportunities, to undertaking on-line based projects, to the provision of the wide range of practical information.

- Organisations managing or supporting the programmes facilitate partnership search through posting an interest on the website, screening applications and making matches themselves.

- The possibility to have direct meetings with a potential partner organisation is included in the LLP, however it is rarely part of other EU programmes, probably owing to the relatively high costs of such meetings.

Importantly, organisations managing European programmes also provide support for beneficiaries in **preparing applications and implementation of successful projects**. Similarly to the tools discussed above, there is a wide variety of practices and tools to support the preparation of project applications, ranging from personalised support through helpline and training provisions to providing more general guidance and good practice examples. An overview of the different practices involved is presented below.

General information on programme requirements

Many European programmes have a programme guide that includes background information. It also includes information on how to take part in the programmes, who is eligible to take part and the main requirements for the projects. The calls for proposals are also often supported by guidance for the participants to complete the application. Moreover, in the case of LLP, Youth in Action and other programmes such information is available in all the languages of the EU Member States.

In addition, most of the organisations managing European programmes produce brochures, leaflets, publish Frequently Asked Questions on the programme websites and other programme material helping potential beneficiaries to understand what programme is about and what is expected. The good practice analysis is also available publically for most of the programmes. It helps organisations interested in the programmes to see what is expected and what other projects are doing.

Workshops and training

Some of the programmes provide more targeted support for potential beneficiaries, through the organisation of thematic workshops, training on how to prepare the application, group consultations and other targeted support. For example, Youth in Action programme developed a network of consultants that provide training, workshops and consultations for the potential beneficiaries. Similarly, Cultural Contact Points are providing training and workshops depending on the needs of the cultural operators that are interested in participating in the European Culture programme. Some LLP actions organise advice sessions for applicants. These provide the opportunity for them to meet representatives from the National Agencies and to discuss their project ideas and receive advice in planning the project.

Individual consultations

Individual consultations and personalised support is provided by a number of the programmes. Most often those interested in the programme can approach the organisations responsible for the programme to discuss their ideas. For example, the website of the National Agencies for the Youth in Action programme invites potential beneficiaries to discuss their projects. The National Agencies for the LLP run a helpline dedicated to consultations with beneficiaries of the programme. In addition, a dedicated email account is being created to provide these consultations by email.

The possibility to provide this kind of personalised support for beneficiaries largely depends on the size of the programmes, the management structures that are in place and the needs of the target groups. However, it is of significant importance in making the scheme accessible.

The experiences of mobility schemes outside the EU framework indicates strongly that simplification of administrative requirements helps to attract new organisations and those who do not have significant experience of international projects. For example, the Nordic Council scheme funding exchange projects between civil society organisation in Nordic and Baltic countries highlights the importance of simplified but

structured application process. The Flemish Government schemes that have already been mentioned above also aim to reduce the administrative burden for participating organisations.

In addition to support measures at the programme level, support for individuals taking part in mobility activities by both sending and hosting organisations is also of crucial importance. The desk research showed that involvement of all these stakeholders in developing the project, provision of the support in preparing for the visit and openness to sharing the results is very important for the success of mobility projects.[66] Support for participants at the project level is beyond the scope of this study, however, it is important to highlight that it is likely to be of high importance for civil society organisations taking part in mobility schemes.

In conclusion, in order to maximise the participation of CSOs in a programme of this kind, there may be a need to develop stronger support mechanisms for civil society organisations (at all levels) to provide them with more systematic information on opportunities for twinning and exchanges and assistance in terms of applying for funding (market-place type websites for example, helplines and contact databases). Appropriate support structures for the new scheme would be of significant importance in increasing accessibility, relevance, effectiveness and efficiency of the new scheme. This should build on existing elements including reinforcing the role of ECPs and EACEA, and any revisions to the Programme guide as appropriate.

[66] Ibid.

6.0 The way forward: specifying a new intervention

6.1 Proposal for delivery

In previous sections we have started to establish an outline case suggesting that EU intervention might be necessary to provide more opportunities for representatives of the civil society organisation to take part in EU mobility activities. We also defined a basic operating model. In this section we focus on how such an intervention might be implemented in practice, together with what management arrangements are needed to ensure effective functioning of the new scheme.

The starting point for developing the new measure on mobility for CSOs is the need to incorporate it within the Europe for Citizens programme. First of all, the programme is already established as a support mechanism for CSOs including management structures, visibility and support for target group. Secondly, establishing a new funding mechanism outside the Europe for Citizens programme, for example by outsourcing, via a call for tenders, to an external service provider (for example a Civil Society Organisation or consortium of organisations, or a private company) is not among the options suggested for the following reasons:

- The funding needed to establish a new management and administration structure is significantly higher than incorporating a new measure within an existing programme;

- Establishing a new mechanism would necessitate significantly higher investment in building the visibility of the programme and increasing awareness among the target group when compared with the Europe for Citizens programme;

- Selection of a contractor CSO that would be responsible for the implementation of new measure outside the Europe for Citizens programme is likely to be a significant challenge owing to the nature of the sector, especially regarding the thematic differences between organisations, and their diversity at local, national and European level;

- Selection of a private company for the implementation of the new measure is likely to be less acceptable by the target group ;

- Establishing a new management structure is likely to have the effect of diluting EU efforts in supporting civil society organisations and have less impact on the sector.

On the basis of the considerations above, we have developed a proposal for the new measure to be incorporated in the Europe for Citizens programme. Our proposal for delivery comprises a **centralised approach**, whereby the Executive Agency (EACEA) would be responsible for the overall implementation of the measure. It would undertake the promotion of the measure, launch calls for proposals, organise the selection of the projects, monitor and evaluate the implementation.

Responsibilities

The centralised management approach, where responsibility for implementation of the programme is shared between the European Commission and the EACEA is widely employed in the Europe for Citizens programme. According to this model the European Commission would be responsible for the strategic direction of the measure. It includes the overview of the management of the budget, setting out the priorities and targets, overview of the implementation and supporting evaluation of the measure.

The EACEA would be responsible for the day-to-day management and administration of the new measure. It would be responsible for its promotion, increasing the visibility among the target group, setting up support measures such as database for partner search, preparing guidance material for potential applicants, launching call for proposals, organising assessment of the applications, signing contracts with successful applicants, monitoring the implementation of the mobility activities, providing the funding for lead organisations delivering mobility activities, supporting beneficiaries in implementation of the activities.

Benefits

This approach was introduced in the Innovative Actions measure (1.6) and provides some important benefits. First of all, EACEA has already implemented the pilot action for introducing the mobility activities within the Europe for Citizens programme and gained significant experience in supporting the target group. Secondly, the administrative structures for launching calls for proposals are already in place. This approach is beneficial when relatively small number of projects is implemented in each Member State. The interim evaluation of the Youth in Action programme shown that centralised implementation is desirable for relatively smaller actions and measures involving beneficiaries at EU level.[67]

Drawbacks

The main drawbacks of this approach are linked to the fact that management of the programme is relatively removed from the potential beneficiaries. It is especially important when aiming to attract organisations working at local or national level and smaller scale organisations. One of the reason for it being the language barrier and the knowledge of the particular context within which such organisations operate.

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[67] Ecorys (2011), *Youth in Action: Interim Evaluation*. Available at:
http://ec.europa.eu/dgs/education_culture/evalreports/youth/2011/interimreport_en.pdf

6.2 Proposed new measure

We now build on our assessment of the views and experience of stakeholders (from both interviews and workshops held) and understanding of a range of mobility programmes assessed, to make specific recommendations concerning the mechanisms needed in the context of the Europe for Citizens programme, including the Innovative Actions measure. We set out the specificities of what would be required in the context of the existing programme architecture.

6.2.1 The Role of Mobility

Mobility in this context means the provision of an opportunity for informal or formal learning experience in one or more different Member States in order to gain access to good practise and to develop new methods and approaches. The purpose of supporting *mobility is as a means to an end or as a tool and not as an end in itself*. Opportunities for mobility must therefore be justified both in strategic as well in relation to specific interventions through "adding value" to the role and engagement of civil society organisations in relation to active citizenship and EU level governance. There is however considerable evidence from case studies and from other sources that mobility can assist such organisations in becoming better equipped to engage in these issues, especially for those bodies who are new to this arena. We therefore propose that mobility should be seen as an important tool and as a necessary but not sufficient condition for support.

6.2.2 Innovation

The **Innovative Actions** measure within Europe for Citizens has provided an important opportunity for consider the development of long term partnerships between civil society organisations. Our proposed new measure as outlined below would build on the innovative actions approach. The application of the term "innovation" would not be used explicitly for our proposed new measure. Our assessment suggests that would-be participants consider the term to be overused and to present an unnecessary barrier in preparing a proposal. However, the focus on encouraging organisations to participate for the first time and for organisations to engage in new areas of policy and to test out new methods of working remain important. Our approach will aim to avoid the setting up of new structures or organisations where this is not needed but to reinforce existing entities. We aim to deepen co-operation and understanding in the context of citizenship. We also wish to make better use of the resources of CSOs through offering activities which will have longer term and sustainable benefits.

6.2.3 Programming

Many existing and potential beneficiaries for such assistance already experience confusion and time consuming use of resources due to the already large number of EU programmes and initiatives which support mobility opportunities in some form or another. Support for yet another new intervention is hard to justify in this context. However, our assessment suggests that there is a significant gap for civil society bodies to access relatively small scale funding for mobility opportunities leading to an initial understanding of aspects of civil society engagement and EU governance, especially in areas of policy where EU institutions play a significant role.

We therefore recommend that a ***stronger and more explicit mobility component is added to the current menu of possible opportunities already available through the Europe for Citizens programme*** 2007 – 2013 without the elaboration of a new intervention.

We therefore propose that an additional measure is added under Action 2, entitled "Support for Learning Mobility for Civil Society Organisations" In addition, the eligible actions in other parts of the programme; especially 'Networks for Twinned Towns', 'Citizens projects' and 'Support for projects initiated by CSOs', should be reviewed to encourage participation of CSOs and also to offer mobility activity (such as study visits, placements, mentoring and related actions) as eligible actions, through project funding where justified in the context of the wider programme objectives.

Activity under the proposed new measure could contribute to all four of the general objectives and specific objectives as outlined in the Programme Guide for 2007 – 2013.

In relation to the permanent priorities of the programme, the new measure would also contribute especially to the generation of ***Active European Citizenship***. Many EU citizens are expressing their citizenship through CSOs, whether as members, volunteers, paid workers, clients or financial supporters. It would also contribute directly to the priority concerning the ***impact of EU policies in societies***. Many EU citizens and indeed organisations are not fully aware of the role of EU institutions in relation to key aspects of public policy (for example environment, labour market) or of how to engage at the EU level.

Measure 3.2 "Support for Learning Mobility for Civil Society Organisations

6.2.4 Target groups

Civil society flourishes when individuals interact, but not through commercial institutions (the market) or through government structures (the state). CSOs provide vehicles for the organised expression of this. This measure will aim to support projects which provide CSOs with a new learning / developmental opportunity to engage in active citizenship through engagement with EU governance in relation to key policy areas. Participation will focus on ***civil society organisations (CSOs),*** this will include **non-governmental organisations (***NGOs)*** which are new to engagement in EU policy, or are entering into a new area of policy. Eligible NGOs should also be able to demonstrate that they are operating in the public interest or in the interests of a specific community of interest or place. Member States, ***trades union bodies, educational institutions*** and also ***employer bodies where they acting in a wider community interest*** should also be eligible. Co-operation between CSOs and local and regional government is an important theme, although local and regional government itself is not directly explicitly classified as a CSO. Participation of individuals may include those directly connected to CSOs (e.g. staff, board members) but also those stakeholders who are not (volunteers, customers, donors, citizens). Applications for funding would however need to be made by CSOs with legal form and structure.

6.2.5 Thematic issues

The purpose of the new measure is to equip civil society organisations to better understand and **engage in areas of policy making** where **European Added Value** will be maximised. The themes of the applications under this measure should therefore reflect this, for example climate change or Europe 2020. The aim should be to ensure that the EU dimension to policy making in selected thematic areas is better understood and that engagement is enhanced. Thematic areas of policy where the EU institutions do not have a major role and where European Added Value will be limited should not be a focus of applications for support. However, the thematic focus should allow for "agenda setting" by CSOs where it can be demonstrated that an EU dimension is needed. Applicants should be required to demonstrate this when making a proposal and should be reflected in the scoring. In addition, consideration should be given to application windows being centred on specific policy themes in order to give for coherence and in order to reduce the number of high quality but unsuccessful applications. Where applications are sought from smaller organisations, the ratio of successful applications to eligible proposals should not exceed between 2:1 and 3:1. In addition, the Commission should provide information concerning indicative success rates from previous application rounds, to allow would-be participants to make an informed choice before devoting resources to preparing a proposal.

6.2.6 Eligible activities

The new measure would support placement opportunities lasting from one to six months, arranged between civil society organisations based in up to five Member States. This will provide a longer lasting opportunity for organisations to develop sustainable co-operation and to gain more in-depth understanding than might be obtained from shorter study visits, workshops and similar events. Placements arranged between partners might be:

- Reciprocal and simultaneous;

- Reciprocal, but take place at different times;

- One way (for example to an EU level umbrella or representative body).

The format and duration of the placement must reflect any potential short-term negative impact that loss of a staff member may have on an organisation's capacity and on its needs and requirements.

Funding to support pilot participation through placements within EU networks, or to engage with EU level umbrella / representative bodies, should also be eligible here. Mobility activities must be explicitly justified in relation to the overall programme objectives.

Each project proposal must set out a specific objective which relates the mobility opportunity to better understanding of and preparation for engagement with EU policy-making and impact.

6.2.7 Preparatory financing and partner matching

Our work has indicated that the costs of developing contacts and preparing a proposal can be considerable and can deter applicants. In other circumstances it can lead to proposals being submitted from partners who are in fact not compatible. Many EU programmes offer support for preparatory/exploratory visits to overcome this problem including components of the LLL programme

(Grundtvig[68], Leonardo da Vinci[69], Comenius[70] and Erasmus[71]) as well as the Nordplus exchange programme[72].

We would therefore propose that a preparatory grant of a maximum of €1,000 should be accessible for undertaking initial visits and preparatory actions as part of the proposed new action. The process for eligibility and approval should balance the need for public accountability with the need for application procedures to be proportionate to the funding being accessed. Equally, there might be an impact in terms of the administrative burden falling on the EACEA for example, since the examples quoted rely mostly on national agencies, which do not exist for the Europe for Citizens programme.

Further to this, we propose that a partner matching data base facility be established, including inter active tools, which will permit would be partners to make initial identification and contact. It is acknowledged that this is only a partial step and that direct contact will be needed, but more many organisations, especially those with limited experience and resources, this can be an important mechanism to support the application process.

6.2.8 Application process

The use of the *grant application electronic form* is a major advance in facilitating the participation of CSOs in EU programmes. It is already available and the new measure should certainly be accessed via this method. The need to send support documents through the post should be also reviewed and wherever possible replaced by scanned / faxed documents, especially for small-value projects.

We propose an *application process* with two or three calls per year (a frequency which is both feasible and indeed provided for under other measures within the programme). Our assessment suggests that infrequent windows deter applications from those organisations with limited experience / access to information and also those that have a strong need to develop understanding and knowledge. Ideally, an open access application process would be introduced, but to reflect the wider structure of the programme, three annual phases should be introduced for the initial period at least.

It is also the case that many EU programmes which support aspects of mobility are hugely oversubscribed and many high-quality applications go un-supported. This is a major source of frustration and for smaller CSOs and other bodies with limited resources can be a major deterrent to accessing programmes.

As discussed above, consideration might be given to *focusing each application phase on a specific area of relevant EU policy*. For example, climate change, Europe 2020, or the rights of migrant workers. These priority topics should be determined by the Commission in consultation with stakeholders and will allow potential participants to adopt a more measured approach to preparing applications.

6.2.9 Financing

There is significant evidence from our work that there is a strong need for easy access to **small scale project funding** which will permit initial entry to EU engagement or entry into EU level dialogue or into a

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[68] http://www.grundtvig.org.uk/page.asp?section=00010001001800010002&sectionTitle=Preparatory+Visits
[69] http://www.leonardo.org.uk/page.asp?section=00010001001900010002&sectionTitle=Preparatory+Visits
[70] http://www.britishcouncil.org/comenius-preparatory-visits.htm
[71] http://ec.europa.eu/education/erasmus/doc918_en.htm
[72] http://ec.europa.eu/education/erasmus/doc918_en.htm

new field of policy. The cost and/or complexity of the application process will need to be proportionate to the level of funding available.

There are two main options:

- Option A:, a flat-rate system where co-funding is provided by means of an agreed intervention rate which is applied to total eligible costs;

- Option B: a budget-based grant where rates are based on an analysis of actual costs incurred and which needs to take account of the total budget available for the action.

Placements should be supported for periods of between one and six months.

Under **Option A**, actual rates would need to be calculated based on a detailed analysis of real costs. Indicatively, for the initial month of a placement (including one month placements), funding might be provided at a flat rate of €3,000 per month to cover accommodation, meals and subsistence, local travel and related items, together with a budget of €500 for international travel[73]. For the second and subsequent months, an allowance of €2,500 per month could be provided to cover accommodation etc; and a further €500 mighty be offered for international travel for the entire additional period. Finally, an amount equal to a maximum of 5% of the total cost of any placement activity could be provided by the EU, as a contribution towards the administrative and related costs incurred by each partner. A maximum total of €20,000 would be available for any individual placement scheme under this option. This option offers advantages in terms of simplicity and transparency, but it is liable to variations in the cost of living between Member States, which may influence the choices made by potential mobility beneficiaries and affect mobility patterns.

Turning to **Option B** above, the principle of co-financing is an important one, but for this level of funding and type of applicant, setting this requirement too high runs the risk of either excluding organisations with limited funding, or those that lack capability for constructing budgets. It is therefore recommended that if a budget-based grant approach is employed, a grant amounting to a maximum of 80% of the total eligible cost of placements be made available. Such a system is potentially more demanding in terms of administrative burden, but has the advantage that it can take account of variations in the cost of living in different countries.

Up-front / pre-payments are already a feature of the Europe for Citizens programme, reflecting the cash flow and resource issues facing many potential participants. The need to address this issue applies in particular to the proposed new measure and it is therefore proposed that *up to 50% of the grant be made available as pre-financing.* This would be provided within 45 days of the signing of the agreement, thus enabling the project to commence implementation (in the expectation that the pre-financing would be used during that period and shortly thereafter).

It is also important for applicants to focus on delivering high quality and useful actions as a result of the support provided and the principle of payment against outputs should also be an integral part of any new measure. We therefore propose that release of the *final tranche of funding (50% of the total grant) be contingent upon proof of outputs* on completion. Here, outputs may be numbers of

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[73] These figures are indicative only - actual rates to be established based on detailed analysis of real costs and with reference to existing rates within the programme and in other programmes.

people/organisations taking part in mobility activity, as well as submission of a final report. In exceptional cases, the Commission should have a mechanism to withhold this funding and to demand repayment of the initial funding where there is no proof of project activities or outputs being generated and where no adequate explanation has been provided.

6.2.10   Timing

The individual activities foreseen within the proposed new measure are relatively small in scale and relatively short in duration, based upon the specific aim of facilitating actions for CSOs that are newly engaged in areas relating to policy making at the EU level or engaging in new areas of policy making for the organisations concerned. ***An overall time limit of 12 months*** for the implementation of supported actions is therefore proposed (where the placements must be completed within 12 months of contract signature).

6.2.11   Other Programme Measures

It is also important to review existing measures within the Europe for Citizens programme to ensure synergy and avoid any duplication or overlap. At this stage no significant issues are envisaged, although it will be important to ensure that the new measure is distinctive and clearly differentiated from the other measures (a matter to be addressed through 'marketing' and information provision relating to the overall programme and associated information and guidance).

7.0 Conclusions

7.1 Activities

Activities	What is the range and what are the types of activities addressing mobility in the sector?
	Are any trends in geographical distribution apparent?
	Are there any trends in terms of themes or issues being addressed through mobility schemes?

A range of opportunities to participate in mobility are available to CSOs). The Europe for Citizens programme is a significant provider of such opportunities, which focus on town twinning, providing operational support for capacity building, and projects that frequently package together a variety of types of trans-national activities, where mobility is one component.

Trends in geographical distribution are difficult to identify; since it is challenging to map or engage with CSOs and other stakeholders beyond the EU level. However, in terms of levels there is clearly a need to link EU and national-level CSOs more strongly, and exchanges represent one effective way to achieve this.

In terms of themes and issues, these are diverse, reflecting the wide range of interests of CSOs. However, common factors include the need to exchange subject knowledge, learn from peers and develop lasting trans-national partnerships.

A significant proportion of EU support, across a number of policy sectors (education and culture but also research and technological development – RTD), is applied to mobility. However, none currently fully meets the demand from CSOs working in the field of active citizenship. The potential contribution from CSOs to meeting the EUs policy goals is considerable, but compared with other sectors there are fewer mechanisms through which support for mobility can be systematically targeted and channelled.

7.2 Actors

Actors	What organisations are currently most engaged with the identity and citizenship agendas? [at EU, national, regional and local levels]
	Which sub-sectors or issues are most well represented in mobility activity?
	Are any groups or interests under-represented?
	What is the extent of partnership working, networks and collaboration among civil society organisations etc. in this field?

Most is known about EU-level organisations, since many are frequent participants in EU programmes, such as Europe for Citizens and indeed receive operational grants from the European Commission. One of the findings of this research has been the comparative difficulty of engaging with stakeholders beyond a relatively small grouping close to the EU programmes. The likelihood is that there is significant under-representation across a range of themes, although it is hard to identify any specific detail. It therefore follows that there is a need to broaden participation and attract more 'new entrants'.

We do know that a wide variety of organisations (not limited to NGOs) are active in promoting civil participation and building European identity, or which have the potential to extend their activities from local/regional/national level to adopt a more trans-national outlook. This includes extensive networking and collaboration, partly since collaborative activity is an inherent part of most civil society focused activity.

7.3   Needs and resources

Needs	What are the needs of stakeholders and beneficiaries with respect to mobility?
	How well do current mechanisms meet those needs?
Resources	What level of resources is typically applied to relevant mobility schemes and where do they come from?
	Are there any innovative examples of how funding may be better organised and applied?

In particular, there is a need for more opportunities for CSOs to take part in practical mobility activity that is accessible to a wider target group, and which goes beyond short-term movements (e.g. study visits, conferences, research projects). This would help organisations to build their own capacity (and that of the sector as a whole) with respect to European policy goals, and be sustainable in the longer term. The emphasis needs to be on 'learning by doing', i.e. exposing beneficiaries to the kind of practical experience that delivers significant value to organisations and individuals, and which triggers longer-term engagement with the EU.

These sector needs are very relevant to overarching EU policy 'needs', in terms of mobilising the skills and experience of CSOs in moving forward the new Europe 2020 strategy. The widening of practical experience for CSOs through mobility could make a significant contribution to EU policy goals. However, to have an impact it will need to be of sufficient scale.

Current mechanisms do not meet these needs effectively – the Europe for Citizens programme makes a valuable contribution to promoting civic participation and building European identity, but mobility initiatives (in the sense of longer-term placements or exchanges aimed at providing practical experience), must compete for funding with operational support and wider project activity. The Innovative Actions component of Europe for Citizens has provided some useful lessons on how access to mobility might be improved.

The level of resources applied to mobility by the EC is significant, notably in the education, culture and RTD sectors. This approach has been shown to have delivered benefits on a relatively large scale. Even

though the civil society 'sector' may not be as cohesive as other sectors, this does not necessarily mean that some of the key principles of such schemes cannot be applied to maximise impact.

A number of successful EU mobility schemes Europe for Citizens programme are characterised by a focus on practical experience, accompanied by comparatively straightforward procedures and in some cases simplified financial arrangements (use of flat-rate grants as a contribution towards expenses for example)[74]. Although clearly not directly transferable, such approaches do offer lessons concerning a cost-effective way to achieve the goal of maximising the potential of mobility through CSOs.

7.4 Demand and capacity

Demand	What is the evidence of demand for improved mobility schemes and how well is this being met currently?
	What is the extent of any "unfulfilled" demand?
Capacity	How well equipped is the civil society sector to respond to future demand?
	How could the sector be better organised to respond more effectively to demand?
	What approach would deliver the best results: top-down, bottom-up or a combination?

There is evidence of strong demand for improved mobility schemes, and a significant gap in the provision of opportunities for placements or exchanges between CSOs, including from one level to another (EU, national, regional and local). While some support is provided by the EU, for example through the Europe for Citizens programme, this seldom caters explicitly for learning mobility and it is not always obvious to many CSOs where to go to access this kind of activity (compared with the broader set of activity which typically includes research projects, organisational development and short-term trans-national collaboration via conferences and study visits etc).

Mobility that delivers practical experience can contribute strongly to building the capacity of civil society to engage with the EU policy agenda. The best way to implement this type of activity, on a sufficient scale and over a significant time-scale, is to offer a simple, systematic scheme which has low entry barriers and a flexible approach to thematic focus. While not all CSOs will have the capacity to respond to these opportunities, a sufficient number will do so to make it viable. The target sector will however need to be supported in terms of information and awareness raising and provision for small preparatory grants to assist in setting up mobility actions.

The types of intermediate structures present in other sectors (universities, LLP national agencies, regional enterprise agencies etc.) are not always available to the civil society sector. Although there is clearly significant capacity within CSOs it is not always systematically linked, except perhaps at EU level.

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[74] Examples include Erasmus (for students), Erasmus Mundus, Marie Curie, Erasmus for Young Entrepreneurs, as well as Erasmus for journalists and for trade unions (the latter supported under the Innovative Actions measure of the Europe for Citizens programme).

Any mobility scheme aimed at the sector will therefore have to include centralised and de-centralised management elements.

7.5 Strategic priorities and Community added value

Strategic priorities	What should be the main strategic priorities in terms of increasing mobility?
	What policies and measures are required to address these priorities?
	Which actors are best/worst positioned to take these priorities forward? Why? How can barriers best be addressed?
	How will the sector need to be organised to respond to them effectively?
Community Added Value	What added value is achieved through actions at EU level (e.g. scope, scale, volume)?
	What role do current EU policies and measures play in promoting and facilitating civil society mobility and what benefits do they bring?

The main strategic priority in terms if increased mobility is to equip CSOs to better understand and engage in areas of policy making where European Added Value will be maximised.

A distinctive and clearly identifiable learning mobility scheme needs to be provided to help address this strategic priority. This should emphasise practical experience ('learning by doing') and be accessible to a wider target group than that which participates in current programmes. The aim should be to achieve sufficient scale (over the longer term) to achieve the type of impact delivered by successful EU mobility schemes in other policy fields.

Although mobility of various types is supported through a number of current measures and schemes, to maximise impact there is a need to meet demand for specific types of mobility from CSOs through a mobility scheme which focuses more on placements and exchanges.

EU-level CSOs are well placed to take these priorities forward, but there is a particular need to involve more national, regional and local CSOs in learning mobility activities. Measures should therefore be designed in such a way as to ensure these types of CSOs have access to support (for example through focused marketing, simple procedures and financial mechanisms such as preparatory grants and up-front payments).

The sector should be encouraged to collaborate trans-nationally and between levels (EU, national, regional and local). In this context, the provision of a contact database to assist CSOs in partner matching for placements should be considered.

The European Added Value of the intervention would be in terms of its contribution to one of the EU's key policy priorities: engaging citizens, particularly in the context of Europe 2020.

7.6 Measures

Measures	What options are available in terms of designing longer-term, more effective mobility schemes?
	What different delivery models should be considered?
	What can we learn from existing schemes in terms of success factors and favourable contextual conditions?

The scale and impact of mobility might be increased through existing or new schemes, as part of a set of wider projects or as a specific initiative (inside or outside a larger programme). Mobility may also be defined with varying degrees of flexibility - ranging from a rather wide definition which encompasses more or less any type of trans-national activity, through outcome-focused definitions such as 'learning mobility' to an emphasis on quite specific mobility sub-types, such as placements or exchanges.

Delivery options include the following approaches: centralised (whereby the EACEA would be responsible for the overall implementation of the measure: de-centralised (where the overall implementation of the new measure would be the responsibility of the Europe for Citizens Points (ECPs) based in each of the Member States); and direct de-centralised (where the responsibilities for the management and administration of the programme would be divided between executive agency and ECPs).

Evidence from existing mobility schemes suggests that initiatives that adopt a systems-based as opposed to a project-based approach have a greater chance of making an impact. This implies an emphasis on practical mobility for more than very short-term periods, within the context of shared values, interests and priorities, where knowledge exchange and the potential for long-term partnerships is strong.

7.7 Sustainability

Sustainability	What features would any new scheme need to have to ensure sustainability?
	What policy frameworks need to be in place to ensure continuing support for civil society mobility?

There is a need to develop stronger support mechanisms for CSOs (at all levels) to provide them with more systematic information on opportunities for twinning and exchanges and assistance in terms of applying for funding. This may potentially also be seen as 'an end in itself' (providing support but not funding, where for example the goal is simply to address a lack of information). The support might be provided through existing EU National Agencies or Europe for Citizens points.

As any new scheme unfolds, it will be important to learn lessons and promote best practice and common approaches and tools. While to start with it is possible that CSOs which have previously been beneficiaries of EU funding may take the lead in taking up opportunities provided by the new measure, as experience builds and learning is shared widely, more new entrants should be attracted. This also highlights the importance of any new scheme achieving sufficient visibility.

The scale of resources applied, over a sustained period, needs to be appropriate to the scale of the challenge.

7.8   Recommendations

We offer here recommendations for the European Commission relating to the design and development of any new intervention. A new measure should be incorporated into the Europe for Citizens programme, which explicitly offers support primarily for placement activity between eligible CSOs and is specified as follows:

Measure 3.2 "Support for Learning Mobility for Civil Society Organisations

1. The aim of the measure shall be to provide CSOs with a new learning / developmental opportunities to engage in active citizenship through engagement with EU governance in relation to key policy areas. Its purpose would be to equip civil society organisations to better understand and engage in areas of policy making where European Added Value will be maximised.

2. The new measure would support placement opportunities lasting from one to six months, arranged between CSOs based in up to five Member States. Placements may be::

   • Reciprocal and simultaneous;

   • Reciprocal but take place at different times;

   • One way (for example to an EU level umbrella or representative body.

3. Participation will focus on CSOs, including NGOs which are new to engagement in EU policy or are entering into a new area of policy. Trades union bodies, educational institutions and also employers bodies where acting in a wider community interest should also be eligible.

4. The thematic coverage of the measure should reflect overarching EU policy goals, for example climate change or Europe 2020. Applicants should be required to demonstrate this in their proposal and it should be reflected in the scoring. In addition, consideration should be given to application windows being centred on specific policy themes in order to give for coherence and to reduce the number of high quality but unsuccessful applications.

5. Eligible activities should include initial participation through placements within EU networks or to engage with EU level umbrella / representative bodies. Mobility activities must be explicitly justified in relation to the overall programme objectives. Each project proposal must set out a specific objective which relates the mobility opportunity to better understanding of and preparation for engagement with EU policy making and impact.

6. Placements would be supported for periods of between one and six months.

7. In line with other EU mobility actions we propose that offering a preparatory grant of a maximum of €1,000 should be considered, for undertaking initial visits and preparatory actions. The process for eligibility and approval should balance the need for public accountability with the need for application procedures to be proportionate to the funding being accessed.

8. Further to this, we propose that a partner-matching database facility is established, including interactive tools, which will permit potential partners to make initial identification and contact. It is acknowledged that this is only a partial step and that direct contact will be needed, but for many organisations, especially those with limited experience and resources, this can be an important mechanism to support the application process.

9. In term of the application process the new measure should be accessed via an electronic form. The need to send support documents through the post should be also reviewed and wherever possible replaced by scanned / faxed documents, especially for small projects.

10. We would propose a two or three phase call for applications per year (as provided for other measures within the programme). Infrequent application windows deter applications from those organisations who have limited experience / access to information and also those who have a strong need to develop understanding and knowledge. Ideally an open access application process would be introduced, but to reflect the wider structure of the programme, three annual phases should be introduced for the initial period at least. Each call might focus on a specific area of relevant EU policy.

11. We would suggest that use of flat rates provides a number of advantages over budget-based grants – simplicity of administration and transparency. Actual rates would need to calculated based on a detailed analysis of real costs; but indicative rates might be in the region of €3,000 for the initial month of a placement (including one month placements)[75], together with an international travel allowance of €500. For the second and subsequent months, a monthly allowance of €2,500 might be provided to cover accommodation etc., together with a further €500 for international travel for the entire additional period. Finally, a maximum EU contribution amounting to a maximum of 5% of the total cost of the placement action might be added to contribute towards the administrative and related costs incurred by each CSO partner.

12. Should a budget-based grant approach be preferred, we would recommend that a maximum grant amounting to 80% of the total eligible costs is made available.

13. A maximum total of €20,000 should be available for any individual placement scheme, regardless of the financing approach used.

14. It is recommended that a pre-financing element of up to 50% of the grant is provided within 45 days of the signing of the agreement enabling the project to commence implementation. It is also important for applicants to focus on delivering good quality and useful actions from the support provided and we therefore propose that the final 50% of the grant is provided against proof of outputs on completion. In exceptional cases, the Commission should have a mechanism to withhold this funding and to demand repayment of the initial funding.

15. A time limit of 12 months for the implementation of individual mobility activity is proposed.

16. It is also important to review existing measures within the programme in this context to ensure synergy and avoid any duplication or overlap.

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[75] To cover accommodation, meals and subsistence, local travel and related items.

Annex One: Overview of EU-funded mobility

ECORYS

Measure	Objectives	Content of the exchanges	Type of activity	Duration	Target group	Individual, group, institutional
Europe for Citizens 2007-2013						
Town twinning citizens meetings	Strengthen commitment to European integration; Active participation; Intercultural dialogue.	Debate on idea of EU, learning the ways of participation in the democratic life of EU, sharing experiences on the benefits of the European integration, demonstrating solidarity and increasing sense of belonging, exchanging views on the priorities and themes of the programme, European history, discovering common cultural heritage.	Meetings	Max duration of the meeting 21 days	At least 25 participants in the meeting	Citizens from twinned towns. Elected local government representatives and municipal officials can take part in the exchanges.
Networks of twinned towns	Development of thematic and long-lasting co-operation between towns Basis for the future initiatives between the towns involved.	Integration of the range of activities like citizen' meetings, workshops and conferences around the same subject. Communication and dissemination material.	Meetings, workshops, conferences	At least 3 events no longer then 21 days each.	At least 30 invited participants should be included in the projects.	Citizens from local authorities e.g. experts, associations, citizens.
Citizens' projects	Exploring innovative methodologies and approaches to promote active participation at European level and building dialogue between European citizens and institutions.	Collection of citizens opinions on the future challenges for Europe; exploring new methodologies for active interaction among the citizens and encouraging dialogue with EU institutions; developing mechanisms for capacity building of the citizens to provide recommendations for the policy makers at EU level.	Citizens panels	Up to 12 months.	Min 200 participants	

ECORYS

Support for projects initiated by civil society organisations	Increase capacity of civil society organisations and their potential to reach larger audiences. Foster mutual understanding of different cultures and identify common values.	Direct co-operation among civil society organisations from different Member States. Two main groups of activities are identified: events and production and realisation projects.	Action, debate, reflection, networking	Max duration of the project 12 months.		Civil society organisations, wider audience
Innovative actions	Develop and test new forms of transnational mobility. Promote transnational mentoring among the civil society organisations.	Activities supported should promote transnational mobility between staff, volunteers, voluntary officers and board members of the partner organisation and groups, staff exchanges.	Mentoring on the one-to-one basis and groups, staff exchanges.	Max duration of the project 12 months	Partnership should be formed from at least 2 organisations from 2 countries	Civil society organisations

Lifelong Learning Programme: Comenius

Individual pupils mobility	Broaden understanding on the diversity of European cultures, personal and skills development of participants.	Study period abroad	Educational exchanges	3 to 10 months		Secondary school children
In-service training	Improve quality of school education	In-service training	Training, conference, seminar, placement, job-shadowing	3-6 weeks		Teachers and other education staff

ECORYS

Assistantships for student teachers	Provide participants better understanding of the European dimension, improve language skills, knowledge on the other EU countries, education systems and improve teaching skills	Assisting in classroom teaching, teaching in the mother tong, support for students with special needs, provide information on the country of origin, introducing or reinforcing European dimension in the host school, developing and implementing Comenius projects	Work placement	3 to 10 months		Student teachers
School partnerships	Enhancing European dimension in schools	Sharing good practice and experience, project research, dissemination of the information on co-operation activities, engaging in arts or other activities, linguistic preparation of teachers and students.	Co-operation projects, study visit, exchanges of experience and good practice	Project duration 2 years		Staff and students of the secondary schools. Representatives of the local communities.
Regional Partnerships	Enhancing European dimension in schools Bilateral partnerships between local and regional school authorities, including schools and other stakeholders in school education and youth work.	Sharing good practice and experience, project research, job shadowing, peer learning, dissemination of the information on co-operation activities, awareness raising, publications, linguistic preparation of teachers and students.	Co-operation projects, exchange of good practice, develop tools for the cross-border co-operation.	Project duration 2 years		Schools, local or regional educational authorities, wider civil society representatives, teaching providers, local employers.

Lifelong Learning Programme: Erasmus

ECORYS

Student Mobility for Studies	Enable students to benefit educationally, linguistically and culturally from the experience of learning abroad; co-operation between institutions.	Study period abroad	Studies abroad	3-12 months	2.2m students took part since the programme was established	Students
Student Mobility for Placements	Support in adapting to the labour market; develop new skills and improve understanding of the host country; co-operation between HEIs and enterprises.	Traineeships and internships in enterprises, training centres, research centres and other organisations including HEIs in the participating countries.	Traineeships and internships	3-12 months		Students
Staff Mobility: Teaching Assignments by HEIs Teaching Staff and by Invited Staff from Enterprises	Encourage HEIs to broaden the range and content of courses they offer; allow students to benefit from the knowledge of academic staff and practitioners in other countries; Exchange of expertise on pedagogical methods; create links between HEIs and enterprises; motivate students and staff to become mobile.	Undertaking teaching assignments	Teaching	1 day to 6 weeks		Teaching staff of higher education institutions and invited staff of enterprises.

ECORYS

Staff Mobility: Training for HEIs staff at enterprises and at HEIs	Allow the staff of HEIs to acquire knowledge and skills relevant for their job; facilitate cooperation between HEIs and enterprises; Motivate students and staff to become mobile.	Short secondment period, job-shadowing scheme, study visit, training course, seminar, workshop, conference	Training	5 to 6 weeks		Academic and non-academic staff

Lifelong Learning Programme: Leonardo

Mobility for Trainees in Initial Vocational Training	Support participants in the acquisition and the use of knowledge, skills and qualifications. enhance the attractiveness of VET and mobility.	Training placement for a period of vocational training and/or work experience undertaken by an individual participant (apprentice, pupil, trainee, etc in IVT) in an enterprise or a training institution in another participating country.	Mobility of apprentices Mobility of persons in school-based initial vocational training	2-39 weeks for individual placements		Persons undergoing initial vocational education and training
Mobility for People in the Labour Market	Support participants in the acquisition and the use of knowledge, skills and qualifications. Enhance the attractiveness of VET and mobility.	Training placement for a period of vocational training and/or work experience undertaken by an individual participant in an enterprise or a training institution in another participating country.	Work placement, participation in the training course	2-26 weeks for individual placements		People in the labour market (workers, self-employed, people available for employment).

ECORYS

Mobility for Professionals in VET	Support participants in the acquisition and the use of knowledge, skills and qualifications. increase quality and innovation in VET systems, institutions and practices.	Transfer, improvement and update of competences and/or of innovative methods and practices in VET. Exchange of experience with their counterparts in other countries with the aim of mutual learning.	Transnational mobility of persons responsible for vocational training and/or human resources	1-6 weeks		Wide range of professionals in VET

Lifelong Learning Programme: Grundtvig						
Visits and exchanges for Adult Education Staff	Improve quality of adult learning including formal, informal and non-formal learning	Carrying out teaching assignments in host institutions, study the adult education systems and delivery in the host country, studying or providing expertise in the adult policy related fields.	Study visits, job-shadowing, conferences, workshops	Up to 12 weeks		Present or future teachers and other staff in adult education
Assistantships	Increase the understanding of European dimension in adult learning, increase foreign language skills, knowledge of European countries and their adult education systems and increase professional and personal competencies.	Assisting in teaching and in some cases management assignments, providing support for adults with special needs, provide information on the country of origin and provide some training in their language, introducing European dimension in the host institution, support in developing and implementing projects	Study visits	12-45 weeks		Present or future staff in adult education

ECORYS

In-service training for adult education staff	Improve quality of lifelong learning through the providing opportunity to adult learning staff to undertake training course abroad	The training should be on one of the following aspects of adult learning: content and delivery of adult education, access to adult education in particular of disadvantaged groups, management and policy related aspects of adult education	Participation in training course	5 days to 6 weeks		Teachers and staff working in adult education
Workshops	Enable participation in the learning events for stakeholders in adult education	Participation in the workshops on the adult education taking place in other European country. Topics include subject areas which are not too dependent on the language knowledge (arts), language learning, stimulating interest in European affairs among adult population, promotion of active citizenship and intercultural dialogue.	Workshops	5-10 days	10-20 persons in the workshop from at least 3 countries	Organisations and individuals in adult education field
Senior Volunteering projects	Provide various types of education opportunities for persons of all ages	Bilateral partnerships and exchanges of senior volunteers between local organisations. Provide opportunity for senior people transnational volunteering possibilities, increase co-operation, engage with local communities.	Volunteering	3-8 weeks	2-6 volunteers from each country, 2 organisations in the project	Citizens aged 50 or over

Lifelong Learning Programme: Transversal

ECORYS

Policy co-operation	Enhance the quality and transparency of education and training systems, identify areas of concern, and strengthen the collection of data and research across the EU.	Study visits to encourage discussion, exchange of ideas and mutual learning on policies at the national and EU levels. These enable people working in the sector at the local, regional or national level to better understand specific aspects of education and vocational training policies in other countries.	Study visits	3-5 days		Wide group of stakeholders relevant to the education and training
Erasmus Mundus						
Erasmus Mundus Masters and Doctorate Cources	Support establishment of the joint Master and Doctorate courses. The aim is to provide the offer of international and innovative courses provided by the consortium of the organisations.	Support for the institutions for the implementation and development of the courses. Grants for students to take part in such courses.	Development of the postgraduate degree courses, scholarships for students and scholars to take part in courses.	HEI, scholars and students.	HEIs from at least 3 countries	HEIs in EU27 and outside the EU, EU and non-EU scholars and students

ECORYS

Partnerships	Partnerships with non-European HEIs and scholarships for students and academics.	Better understanding and mutual enrichment between the EU and third countries; co-operation in the field of HE through promoting the exchange of persons, knowledge and skills at HE level.	The activities mostly include: students and staff mobility, provision of education and training as well as research assignments to students.	Undergraduate and post-graduate students, staff from HEIs.	In the partnership at least 5 European HEIs	Students and staff from relevant HEIs and countries
Co-operation with industrialised countries						
EU-US and EU-Canada co-operation	Promote better relations between European and partner countries' citizens, and improve understanding of cultures, languages and institutions. Facilitate the acquisition of skills needed for the global knowledge-based economy.	Joint study programmes with industrialised countries, particularly in North America and the Asia-Pacific region, that provide financial support for student mobility.	Joint study programmes with students spending substantial amount of time in partner country, short term mobility for students and education staff	Varies from one semester to substantial part of studies		Students and staff of institutions in partner countries
Youth in Action						

ECORYS

Youth for Europe	To promote a sense of 'Europeanness' among young people from every strata of society and encourage them to participate in the democratic process	Activities include: Youth Exchanges, Youth Initiatives and Youth Democracy Projects. The projects including more then one aspect of the activities can also be supported and they are called multi-measure projects.	Young people exchanges based on non-formal learning activities.	Activities varies from short term exchanges to longer term co-operation projects	Youth exchanges: 16-60 participants in the project Youth initiatives: min 4 participants Youth Democracy projects: min 16 participants	Young people
European Voluntary Service	Support young people's participation in various forms of voluntary activities, both within and outside the EU.	Voluntary service for the benefit of the local community. The service is unpaid, non profit-making and full-time.	Volunteering	Up to 2 years	1-100 volunteers per project	Young people aged between 18 and 30
Youth in the World	Develop mutual understanding between peoples in a spirit of openness, development of quality systems that support the activities of young people in the countries concerned.	Youth Exchanges and Training and Networking Projects in the youth field with neighbouring countries. Co-operation in the youth field, exchange of good practice with countries from other parts of the world.	Youth exchanges, non-formal learning, training, networking.	Duration of exchanges 6-21 days, duration of the project max 15 months	16-60 participants in the exchanges.	Young people aged between 13-25
Youth Support Systems	Building the capacity of youth workers and organisations to develop quality activities, thus improving the overall quality of the Programme.	Various activities supporting the quality of the services of the Programme and capacity building of the youth organisations and youth workers.	Activities include: job shadowing, study visit, feasibility, evaluation visits.	Short-term mobility periods. Networking activities last the longest 3-15 months.	The number of the participants in other activities depends on the type of activity itself	Youth workers and youth organisations

ECORYS

Erasmus for young Entrepreneurs						
Erasmus for young Entrepreneurs	Helping new entrepreneurs to acquire relevant skills for managing a small or medium-sized enterprise (SME) by spending time in a business in another EU country.	On-the-job-training for new entrepreneurs in SMEs elsewhere in the EU in order to facilitate a successful start and development of their business ideas. Exchanges of experience and information between entrepreneurs on obstacles and challenges to starting up and developing their businesses. Enhance market access and identification of potential partners for new and established businesses in other EU countries. Networking by building on knowledge and experience from other European countries.	Shadowing; market research and developing new business opportunities; project development, branding, sales and marketing; work on concrete projects from one or more of the above mentioned areas.	1-6 months. The duration can be divided into slots of at least 1 week.		SMEs, young entrepreneurs

ECORYS

Annex Two: Fiches on operational models

International

Nordic Council of Ministers

Objectives:

► To build cooperation and partnerships - strengthen relations between the countries.

► Build capacity amongst NGO's

► To develop Nordic-Baltic co-operation in areas of common interest

Target group:

► Civil Society Organisations at different levels

► The CSO's must be based in the 8 Baltic/Nordic countries - Russia, Belarus, Denmark, Norway, Estonia, Iceland, Sweden, Greenland, Latvia, Lithuania, Åland Islands, Finland, Poland, Faroe Islands

Finance:

► 40% at start of project, 45% mid term and 15% when it is completed

► Co-funding is not compulsory in order to apply, but cofunding is part of the assessment criteria.

► Seen as seed funding/pump priming.

Structure:

► The Nordic Council of Minister administers the programme.

► They deal direct with the applicants.

► Recruitment via website and conference, but applications come from those who have already taken part.

► At least three NGOs must be involved in a project for it to be eligible for funding

Support for target group:

► Simplified but structured application process.

► Sharing technical and thematic expertise between NGO's (capacity building)

► It is about Individual learning and organisational learning

Activities:

► Activities are not prescribed but the project must fall into one of priority theme i.e. gender equality or health

► Benefits to Nordic countries

► Promote the development of civil society in Russia and/or Belarus

European Union

Grundtvig – Senior Volunteering Action

Good practice example:

► Museum in Manchester exchanging volunteers with the museum in Budapest. Volunteers from Manchester had experience in object handling and volunteers from Budapest had excellent experience in running tours programme.

Objectives:

► Enable senior citizens to volunteer in other European country as a form as informal learning activity

► Create lasting partnerships between host and sending organisations

Target group:

► Volunteers aged 50 and above

► Wide range of civil society organisations focusing on small organisations acting at local level

Finance:

► Each organisation receives their own grant to cover their costs as sending and hosting organisation

► Costs are covered as flat rates

► Volunteers do not receive funding directly

► Limited funding available

Structure:

► Part of LLP Grundtvig action

► Administered by the LLP National Agencies

► Action is promoted through newsletters and info days by national agencies

► Project based approach

Support for Target Group:

► NA run the helpline for potential applicant organisations

► Written guidelines prepared by EC and NAs

► Provisions to apply for funding to visit potential partner

► Would be beneficial to have more targeted support for small organisations on how to plan and run the projects

Activities:

► Volunteer exchanges during the period of 3-8 weeks

► Duration of the project 2 years

ERASMUS for Young Entrepreneurs

Objectives of the programme[76]:

► On-the-job-training for new entrepreneurs in small and medium-sized enterprises (SMEs) elsewhere in the EU in order to facilitate a successful start and development of their business ideas.
► Exchanges of experience and information between entrepreneurs on obstacles and challenges to starting up and developing their businesses.
► To enhance market access and identification of potential partners for new and established businesses in other EU countries.
► Networking by building on knowledge and experience from other European countries.

Target groups:

► New entrepreneurs e.g. entrepreneurs who have just started up a business or who are just about to start a business.

Finance:

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[76] The European Entrepreneur Exchange Programme: User Guide

► Financial support to cover travel costs to the country and subsistence costs including accommodation during the visit. This support can be provided in advance, if necessary.

Support Structure for target group:

Support form intermediary organisations in facilitating contacts between the new entrepreneur and hosts.

Erasmus for Young Entrepreneurs Support Office coordinates activities of the intermediary organisations.

Activities:

► New entrepreneurs must present a business plan for their enterprise and develop a work/learning project for their stay abroad, this must include work on real-life business tasks; such as shadowing a senior host entrepreneur, market research and developing new business opportunities or understanding SME finance for example work on concrete projects from one or more of the above mentioned areas.
► Duration of the stay abroad: 1 – 6 months, stays can be divided into slots of a minimum of 1 week and spread them over a maximum of 12 months.

Marie Curie Actions

Objective:

► Develop the European Research Area
► To ensure researchers meet their full potential
► Bringing researcher together to collaborate, learn and exchange ideas

Target Group:

► There are numerous actions which target researcher at varying stages of their career for example, researcher just starting out in their career, those with four or more years in research or those wanting to return to the EU after a mobility period in a third country. There are also international schemes enabling researchers from third countries to come into the EU to undertake fellowships.
► There is also an International Research Staff Exchange Scheme which is a coordinated staff exchange scheme, which support research organisations to set up or strengthen long-term cooperation with other organisations.

Finance:

► Financial support is provided to the fellow/member of staff for the period of the fellowship (full time equivalent), the contributions vary depending on the action and on the country where the fellowship/exchange is undertaken.

Structure:

► Mobility periods can be taken anywhere in the world.
► The length of the mobility varies, but they are usually between 1 and 3 years.
► There are provisions for researcher to return to their country of origin by means of a re-integration Action, once the initial fellowship has been completed.
► There are provisions for a researcher to take their pfamily with them on the mobility and some of the costs are covered by the programme.

Activities:

► The research fields are broad depending on the action. Some actions specify "any research field in the humanities or science" could qualify, or in others the eligibility criteria states "all areas of scientific and technological research".
► The activities will include some element of training depending on the action for example training-through-research, hands-on training or knowledge transfer.

Regional/National

TWINS (Twinning project) Ruhr 2010, Germany

Objectives:
► Builds on existing relationships, focussing on cultural operators and project promoters rather than politicians and officers

► Builds critical mass and future-proof structures for a wider area, by encouraging cities to use the contacts of neighbouring cities

► Recognise that best ideas do not come from organisations with most capacity or expertise in running European or national-level projects

Structure:

► Facilitated by staff and resources of ECOC delivery agency and project teams supported by ECOC staff (in partnership mode, rather than representing authority).

► Creation of forums to allow projects to learn from each other

► Publicised in the context of wider ECOC programme, though difficult to communicate clearly, as a package, in own right

► International jury, representing perspectives from overseas, nationalities and ethnic groups

► Model can be applied to other sectors, areas of interest such as cultural heritage, tourism

Activities:

► Flexible formats with a focus on impact against three defined criteria, not methods/ activities/ durations

► Initial focus on quality of ideas and number of partners, then some scope for geographic or social distributions (once unfeasible projects removed)

► Value of physical visits and face-to-face meetings, though these should be focussed on specific cultural sectors and actors, rather than traditional twinning between politicians or local government officers

Target Group:

► Enables larger programme like ECOC to develop small-scale projects that reach small towns, hard-to-reach groups and have an impact 'on-the-ground'

► Value of cultural intermediaries, multipliers to assist with partner search and develop new links

Flemish Government Educational Mobility Schemes – GROS and EUROKLASSEN

Objectives:

► Provide the opportunity for schools to gain experience in international co-operation at smaller scale then for example Comenius projects.

► Provide the schools with opportunity to build international partnerships.

Target group:

► GROS – schools in the neighbouring countries.

► Euroklassen – schools in the European countries that take part in Lifelong Learning Programme.

► Both projects are targeting the whole class rather then individual students.

► The projects include two partner schools.

Finance:

► The lump sum per student for international visit for the exchanges.

► Teachers can get lump sum funding for the preparatory visit.

► No maximum limit how long the visit should take place but the funding is the same.

Structure:

► Both schemes are implemented by the Flemish Department of Education and Training.

► The projects are selected through annual calls for proposals.

► Some two people part time are responsible for the implementation of the schemes.

Support for target group:

► Flexibility of the activities.

► Low administrative requirements and time inputs needed to prepare the application. There is no requirement to provide all the receipts only the prove that the visit took place is needed.

► Schools can approach organisations that are supporting schools in preparing international projects. These organisations are providing support for wide range of international cooperation projects for schools.

Activities:

► Both programmes support development of the common project in the chosen theme that last for the whole year.

► The selection of the theme and the activities are very flexible and school decides what they want to do.

► Short term exchanges between schools (GROS – minimum 3 days visits, Euroklassen – minimum 6 days visits).

► Two international exchanges should be included in the project: students from the Netherlands visiting partner school and partner school visiting them.

Private Sector

Bentley Motors Foreign Services Exchange Scheme

Objectives:

► The exchange scheme is aimed at addressing skills gaps or to support strategic changes, expansion, projects.

Target group:

► Staff with specialist skills and senior managers

► Graduate trainees

► The mobility scheme usually operates around their European sites but there is global reach.

Activities and Structure:

► Typically 6 months exchange for short term or 3 years for 'permanent' positions.

► Activity depends on what is sought to be achieved i.e. skills gaps, expansion project etc.

► The exchanges are based on requests from local sites and offices

► No targets or quotas for numbers of exchanges to take place.

► More support is given to smaller companies and new sites

► For short term exchanges the costs are split between the sites, for long term exchanges costs are paid by the receiving site.

► Coordinated at group Head Office who assists with practicalities like administration and finance.

Advantages:

► Combines business benefit and career development

► Responsiveness of the company, advantages due to its scale and access to skills

► The scheme improves group identity, individual contacts and networking.

ACARDIS

Objectives

► To respond to client needs, the company needs to have internationally experienced staff.
► Employees in higher positions within the company need to have an international outlook and experience.

Target groups

► The mobility opportunities are open to all employees.

► Employees apply to undertake a period of mobility through a web portal, they have to explain what they want to gain/learn from the experience and their manager must approve the request.

Finance

► The scheme is financed by a foundation set up by the company itself.

► Participants receive costs for the week to cover travel and accommodation this figure is capped at 3000 euros.

Activities

► The mobility can be short term, for a week to another Acardis office.

► Currently developing the scheme to facilitate longer term mobility opportunities for 3-6 months

► There is the possibility employees can transfer to another office permanently.

CSOs

Eurada – European Association of Regional Development Agencies

Activities:

► Role to provide exchange of information and experience between members and to provide knowledge of and input into EU policies

► Mobility experience: has 125 members in Member States and candidate countries; has newsletter, e-news, website, events, informal exchanges

► Timescale: over 20 year period

► Sources of funding: subscription costs for members, members own resources (eg for travel), some participation in EU programmes, but not for core activities

Key elements:

► Small amounts of funding for pump-priming are most important

► Ensure definition of "professions" covers those working on cohesion-related activities

► Ensure mobility is aligned with the core objectives of the organisation

► Try mobility activities of innovative type (not just twinning) e.g. competitions

South West Trade Union Congress

Objectives:

► Increasing the awareness of young workers in relation to civic engagement, particularly workers rights

Target group:

► Young workers in the South West of the UK

Finance:

► They funded the project through their own resources no external support, which has meant that their activities have been limited. However the partner Trade Union in Germany – DGB did get some EU funding.

Activities

► Exchange of experience for young people, this has included short placement visits, fact finding

visits, participation in events.

Eurochild

Objectives

► Promote the welfare and rights of children and young people in Europe through building a network of active organisations and individuals who are working in and across Europe to improve the quality of life of children and young people. Underpinned by the UN Convention on the Rights of the Child and through:

- ➢ Sharing information on policy and practice;
- ➢ Monitoring and influencing policy development at national and European level;
- ➢ Creating interest groups and partnerships between member organizations;
- ➢ Representing the interests of its members to international institutions;
- ➢ Strengthening the capacity of its members through training, individual advice and support.

Target groups

► CSOs, government (international and EU institutions, national, regional local administrations).

Finance

► 85% EU funding (PROGRESS[77] operating grants and EU programmes), memberships and income from events, expertise, donations etc.)

Structure

► Network of organisations and individuals, with members in 35 countries across Europe

Support for target group

► Study visits and exchanges are an important part of the support provided to the target groups. Trans-national exchanges are a key tool for capacity building across the network. Demand for visits to EU institutions by network members is strong.

Activities

► Study visit to Sweden and Denmark by the Thematic Working Group on Family and Parenting Support (April 2010): This concerned a new tool for mutual learning and information exchange between Eurochild members from Bulgaria, Finland, Ireland, the Netherlands/Flanders and Wales. These national delegations took part in a five-day visit to countries selected for their low child- poverty levels positive child outcomes and high levels of labour market participation amongst mothers. The key objective was to obtain an understanding of family policies and

[77] Community Programme for Employment and Social Solidarity (2007-2013) PROGRESS, DG Employment, Social Affairs and Equal Opportunities.

how they interact in practice with labour market polices. The strategic objective was to strengthen the Eurochild network by facilitating peer-learning and exchange.

► TAIEX (DG Enlargement) sponsored visit by representatives from non-EU countries (e.g. Croatia) to EU institutions (Parliament) providing the opportunity to organise workshops on topics such as child poverty. Participants were professionals, NGOs and local/regional representatives. The aim was to have a heterogeneous group to stimulate dialogue.

Annex Three: Topic Guides

**A study of maximising the potential of mobility in building
European identity and promoting civic participation**

Topic Guide: Interviews with Stakeholders

**Objective: to understand stakeholder thinking on mobility issues, as well as the
current and future mobility needs of stakeholders in this field.**

About the Interviewee

17.   What type of organisation do you represent?

18.   Are you aware or have you been involved in the Innovative Actions pilot?

19.   Please describe any relevant initiatives and activities you are involved with at
national and at EU level

Current Provision and Needs

20.   What are your views on the current provision?

21.   Which type of organisations do you think are currently most engaged with the
identity and citizenship agendas? [at EU, national, regional and local levels]

22.   Do you think any groups or interests are currently under-represented?

23.   What is the current extent of partnership working, networks and collaboration
among civil society organisations etc. in this field (at national and EU levels)? Could
this be improved and what impact would this have?

24.   What are the needs of stakeholders and beneficiaries with respect to
mobility?

25.   To what extent is there any "unfulfilled" demand?

26.   Are there any obstacles or constraints to participation in the current
schemes?

27.   What are the financial implications of participation are there budgetary
constraints?

28.   Are you aware of any good practice examples of mobility schemes? What is
the focus and scope of this scheme?

Mobility

29.   In your opinion what does mobility mean to European citizens?

30.   Can mobility be used to develop European identity and civic participation or help people to feel more European and/or change their opinions? Examples

31.   Can mobility of some groups create added value and wider impacts amongst the population as a whole? Examples

32.   What types of mobility (or what conditions are needed) to have tangible and long-lasting impacts? Examples

33.   How might high-impact national-level activity be transferred to a European space?

Future Needs

34.   How well equipped is the civil society sector to respond to future mobility opportunities?

35.   How could the sector be better organised to respond more effectively to demand?

36.   What approach would deliver the best results?

37.   What features would any new scheme need to have to ensure sustainability?

Conclusions

38.   Are there any additional comments that you would like to make on increasing the potential of mobility schemes?

**A study of maximising the potential of mobility in building
European identity and promoting civic participation**

Topic Guide: Interviews with Innovative Actions projects and applicants

**Objective: to find out why organisations applied for the IA pilot, the successes
and challenges of the pilot and what its added value is.**

About the interviewee

1.   What type of organisation do you represent?

39.   What is your role in the Innovative Actions pilot?

40.   Please describe any relevant initiatives and activities you are involved with at national and at EU level

Innovative Action Pilot

41.   Why did you apply for the Innovative Action pilot? Could you have secured funding for the activity from any other sources?

42.   What have the main successes or challenges been for the project?

43.   How would you describe the EU added value of the activities supported?

44.   What will happen when the funding ends in early 2011?

Current Provision

45.   What are your views on the current provision of the CfE programme?

46.   Which type of organisations do you think are currently most engaged with the identity and citizenship agendas? [at EU, national, regional and local levels]

47.   Do you think any groups or interests under-represented?

48.   What is the current extent of partnership working, networks and collaboration among civil society organisations etc. in this field (at national and EU levels)? Could this be improved and what impact would this have?

49.   What are the needs of stakeholders and beneficiaries with respect to mobility?

50.   To what extent is there any "unfulfilled" demand?

51.   To what extent would you agree that the Pilot has created added value or had additional impact in the following areas?

- • Increase the volume or scale of the activities

- • Increase the scope of activities, or encourage new types of activity

- • Support innovation or the transfer of ideas and good practice

- • Help to develop the capacity of civil society organisations

- • Increase international mobility

- • Increase dissemination and communication work

- • Support institutional and process improvements at either EU or Member State level

- • Promote more coherent policy development in the area of active citizenship

- • Provide symbolic value, or positive representations of European diversity, unity, and EU values and achievements

Mobility

52.   What does mobility mean to European citizens?

53.   Can mobility be used to develop European identity and civic participation or help people to feel more European and/or change their opinions?

54.   Can mobility of some groups create added value and wider impacts amongst the population as a whole?

55.   What types of mobility or what conditions are necessary for mobility schemes to have tangible and long-lasting impacts?

56.   How might high-impact national-level activity be transferred to a European space?

The Future

57.   How well equipped is the civil society sector to respond to future mobility opportunities?

58.   How could the sector be better organised to respond more effectively to demand?

59.   What approach would deliver the best results?

60.   What features would any new scheme need to have to ensure sustainability?

Conclusions

61.   Are there any additional comments that you would like to make on the Innovative Actions pilot?

**A study of maximising the potential of mobility in building
European identity and promoting civic participation**

Topic Guide: Interviews with the European Commission

**Objective: to understand DG thinking on mobility issues, collect examples of best
practice in mobility schemes as well as to understand the current and future
mobility needs.**

About the interviewee/organisation

1. What is your role in/knowledge of mobility schemes and/or the Innovative Actions
    Pilot?

Citizenship and European Identity

62.   What is XX DGs particular role and interest in this policy area?

63.   What is your understanding of the terms European identity and civic
partnership?

64.   What are the ultimate benefits to society (institutions, individuals,
organisations) that would derive if progress were to be made in this field?

65.   What type of measurable improvements should we expect to see if the EU's
interventions were successful?

66.   Are there opportunities for cross-sectoral working across DGs?

Mobility

67.   What specific contribution does mobility have to make in this policy field?

68.   What would you consider to be key success factors for mobility?

69.   Where does mobility sit with respect to other EU instruments; specifically in
terms of impact and cost-effectiveness?

70.   What does mobility mean to European citizens?

71.   Can mobility be used to develop European identity and civic participation or
help people to feel more European and/or change their opinions? Examples

72.   Can mobility of some groups create added value and wider impacts amongst
the population as a whole? Examples

73.   What types of mobility (or what conditions are necessary for mobility schemes) to have tangible and long-lasting impacts? Examples

74.   How well equipped is the civil society sector to respond to future demand in terms of mobility schemes?

75.   Are you aware of any good practice examples of mobility schemes? What is the focus and scope of this scheme?

76.   How might high-impact national-level activity be transferred to a European space?

Current Provision

77.   Which types of organisations are currently engaged with the identity and citizenship agendas?

78.   Do you think any groups or interests are currently under-represented?

79.   What is the evidence of demand for improved mobility schemes and how well is this being met currently?

80.   What is the current extent of partnership working, networks and collaboration among civil society organisations in this field? Is this sufficient?

81.   How well do current mechanisms for mobility meet the needs of organisations who participate in the schemes?

82.   What level of resources is typically applied to relevant mobility schemes and where do they come from?

83.   What role do current EU policies and measures play in promoting and facilitating civil society mobility and what benefits do they bring?

The Future

84.   How could the sector be better organised to respond more effectively to opportunities to participate in and support more trans-national activity in the field of citizenship and related areas?

85.   What approach do you think would deliver the best results?

86.   What features would any new scheme need to have to ensure sustainability?

Conclusions

87.   Are there any additional comments that you would like to make on increasing the potential of mobility schemes?

Annex Four: Workshop Agendas

Agenda

Second Workshop on "Shaping the Future of EU Civil Society Mobility Schemes"

Tuesday 18th November 2010 (9.00 – 14.00)
To be held at: Renaissance Brussels Hotel

Time	Agenda	Description
9.00 - 9.30	Arrival and coffee	
9.30 - 9.45	Introduction – European Commission	Building European identity and promoting civic participation
9.45 – 10.15	About the study - Ecorys	Brief introduction to the study aims and objectives, and findings so far. Introduce the issue of "mobility" as a topic for discussion and validation of a shared definition. Explanation of the workshop objectives and activities.
10.15 – 11.15	Small-group discussion	Participants work in small groups to discuss how the potential of mobility might be maximised in terms of the three building blocks of: (1) people (2) activities (3) objectives ...to formulate their top three priorities for each.
11.15 – 11.30	Coffee	
11.30 – 12.30	Identifying strategic priorities (reporting back)	Groups report back, followed by a plenary discussion to identify top four strategic priorities.
12.30 – 13.00	Conclusions	Summing up and final remarks
13.00 – 14.00	Lunch and departure	

Agenda

Second Workshop on "Shaping the Future of EU Civil Society Mobility Schemes"

Tuesday 8th February 2011 (9.00 – 12.45)

To be held at the Commission's Place Madou 1210 Brussels, Belgium (COMM MEETING ROOM DIR C MADO (6th floor: 115-118)

Time Agenda	Description
9.00 - 9.15 Arrival and coffee	
9.15 - 9.20 Welcome and Introduction - European Commission	
9.20– 9.35 About the study – Ecorys	Brief introduction to the study's aims and objectives, recall the results of the first workshop and set out the purpose of the second workshop.
9.35- 10.30 Present work in progress - Ecorys	Review examples from a wide range of mobility schemes across Europe (EU, National, public and private sector).Results to date will be used to propose key operational elements which will inform the development of a small number of generalised models.
10.30 – 10.45 Coffee and pastries	
10.45 – 12.30 Developing operational models	Facilitated workshop discussion: Reactions and observations on operational elements (gaps and revisions) and linking elements together in order to move towards agreed operational models.
12.30-13.00 Conclusions	Summing up and final remarks

Time	Agenda	Description

Annex Five: Workshop Briefings

BRIEFING PAPER

Workshop on "Shaping the Future of EU Civil Society Mobility Schemes"

Renaissance Brussels Hotel, 18 November 2010

Introduction

This workshop is part of a study being carried out on behalf of the European Commission, which is exploring how to maximise the potential of mobility in building European identity and promoting civic participation in the EU; and to better target future actions.

The aim of the event is, through interactive discussion and debate, to draw on the experience, expertise and perspectives of stakeholders in order to:

1. Identify specific mobility needs;
2. Highlight existing schemes that respond to identified needs (including best practice and examples where lessons may be learned);
3. Identify gaps and what kind of provision is still required.

The agenda is presented at Annex 1, while Annex 2 provides an overview of current EU activity and a summary of the results of our initial stakeholder consultations.

This is the first of two workshops: the aim of the first is to better understand the current situation and identify possible strategies and priorities. The second (scheduled for early in 2011) will address the possible strategies in more depth and how impacts might be maximized.

Workshop activities and tools

For the purposes of the study, we see "high-impact mobility" as a function of three main variables, as illustrated below:

If each of these building blocks is properly understood and optimised, the result should be mobility activity which meets the needs of stakeholders, is cost effective and has a strong impact on the achievement of the EU's policy goals in the field of citizenship.

At this first Workshop participants will be invited to consider each of the three building blocks on the left hand side of the diagram above,(including any interdependencies between them).

The following questions will be used to guide the discussions:

People
➢ Which types of organisations are currently not involved enough, which should be, and what would the benefits of this be?
➢ Which individuals might be more involved, and what would the benefits be?
➢ Who are the potential 'multipliers' - people or organisations with a high potential to influence change?

Activities
➢ To what extent are certain types of activity appropriate for certain target groups?
➢ How effective is the approach adopted by the EU (focus, structures, programmes etc.)?
➢ What can we learn from current schemes?

Objectives
➢ What should the objectives of any future initiative be?
➢ What goals should it address as a priority (e.g. capacity building, peer-to-peer exchanges, networks, individuals, sectoral/thematic approaches etc.)?
➢ How might these needs best be met in future (e.g. centralised versus decentralised structures)?

Bringing together the outcomes from discussion of these issues, the workshop will conclude by identifying a set of possible strategies and priorities.

Defining 'civil society' and 'mobility'

Both 'civil society' and 'mobility' are terms that are open to a wide variety of meanings. For the purposes of this study the concept of 'civil society' includes citizens' groups, European public policy research organisations (think-tanks), trade unions and other non-governmental organizations in the field of voluntary work and/or promoting active European citizenship. It also includes local and regional authorities, in view of their importance as partners to civil society at a local level and their involvement as stakeholders in *Europe for Citizens.*

As far as 'mobility' is concerned, the concept means different things in different contexts, and this will be an initial topic for discussion at the workshop in order that a shared understanding is reached before the main debate. However, it is worth noting the definition used by the High Level Expert Forum on Mobility[78] in which the need to generalize and give new impetus to learning mobility is highlighted, together with the need to "break firmly with past patterns". In this context transnational learning mobility should be understood in a broad sense as a structured period of time spent in another country undertaken with a specific learning objective. It therefore goes beyond the kind of formal study supported through the Erasmus programme and includes

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[78] Report of the High Level Expert Forum on Mobility: "Making Learning Mobility an Opportunity for All", European Commission, ec.europa.eu/education/doc/2008/mobilityreport_en.pdf

informal learning and knowledge acquired through exchange of ideas with peers and volunteer activities.

ANNEX 1

Workshop agenda

Time	Agenda	Description
9.00 - 9.30	Arrival and coffee	
9.30 - 9.45	Introduction – European Commission	Building European identity and promoting civic participation
9.45 – 10.15	About the study - Ecorys	Brief introduction to the study aims and objectives, and findings so far. Introduce the issue of "mobility" as a topic for discussion and validation of a shared definition. Explanation of the workshop objectives and activities.
10.15 – 11.15	Small-group discussion	Participants work in small groups to discuss how the potential of mobility might be maximised in terms of the three building blocks of: (1) people (2) activities (3) objectives ...to formulate their top three priorities for each.
11.15 – 11.30	Coffee	
11.30 – 12.30	Identifying strategic priorities (reporting back)	Groups report back, followed by a plenary discussion to identify top four strategic priorities.
12.30 – 13.00	Conclusions	Summing up and final remarks
13.00 – 14.00	Lunch and departure	

ANNEX 2

Overview of current EU activity

The general objectives of the *Europe for Citizens* programme[79] provide a useful starting point for understanding the goals of EU policy in this field:

a) Giving citizens the opportunity to interact and participate in constructing an ever closer Europe, which is democratic and world-oriented, united in and enriched through its cultural diversity, thus developing citizenship of the European Union;

b) Developing a sense of European identity, based on common values, history and culture;

c) Fostering a sense of ownership of the European Union among its citizens;

d) Enhancing tolerance and mutual understanding between European citizens respecting and promoting cultural and linguistic diversity, while contributing to intercultural dialogue.

Mobility schemes which enable people to experience life in another EU country are an important means of helping to achieve the objectives of the programme. The right to be mobile across national borders is one of the fundamental freedoms of European citizens and is actively promoted by the European Union. The report of the High Level Expert Forum on Mobility[80] highlighted the crucial role of trans-national mobility in both:

> ➢ strengthening Europe's competitiveness and capacity for innovation (by boosting skills, including languages, and employability and enabling the acquisition and circulation of new knowledge and experience);

> ➢ and deepening the sense of European identity and citizenship (by helping to break down barriers between people and groups and making European integration more meaningful and tangible. By promoting language learning, trans-national mobility also facilitates mutual understanding and can help develop greater tolerance and respect for diversity, thus contributing to the promotion of a more stable and peaceful world).
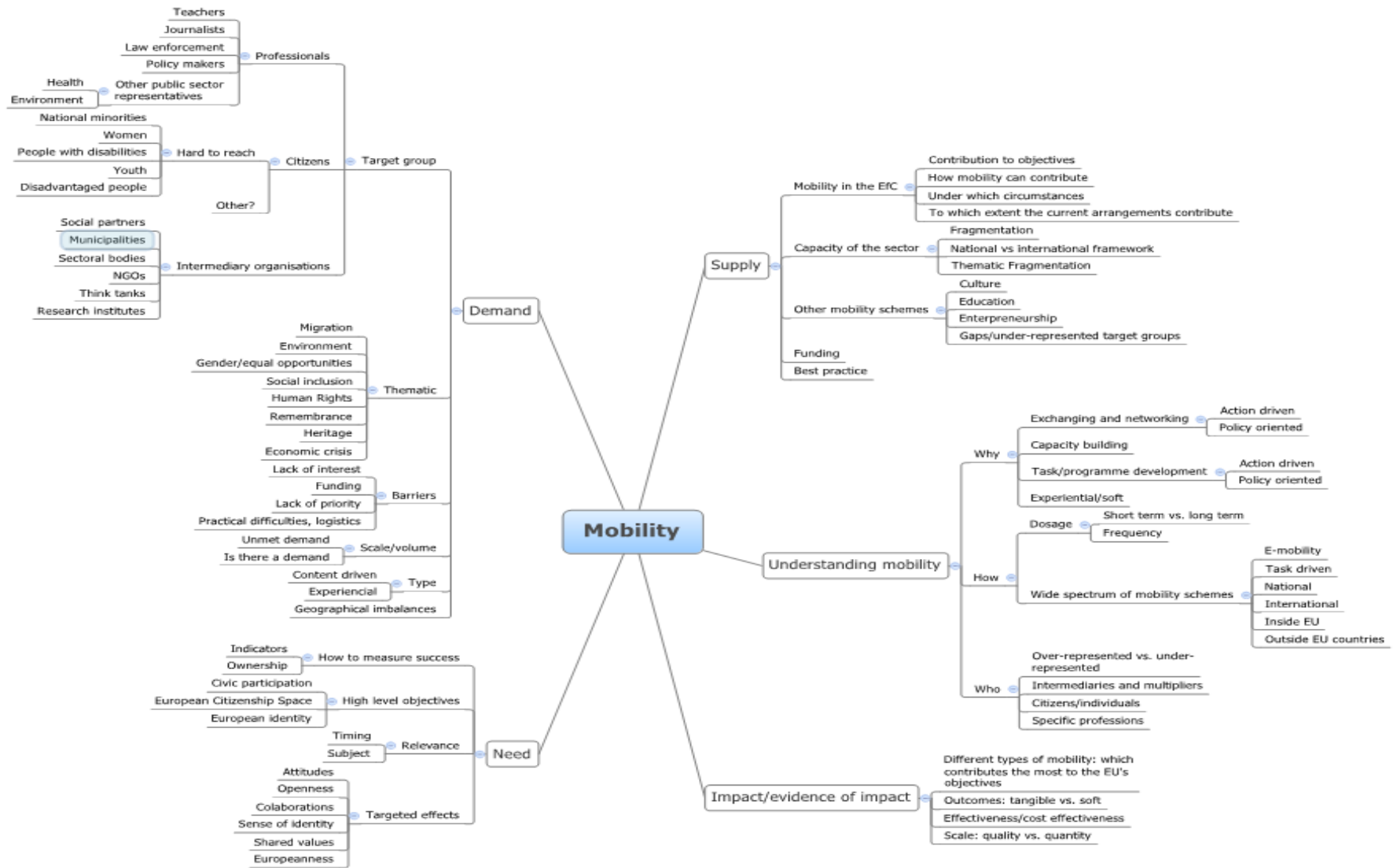
Learning mobility thus helps to equip citizens to fully participate in and benefit from the European Union as well as making an important contribution to the development of human capital.
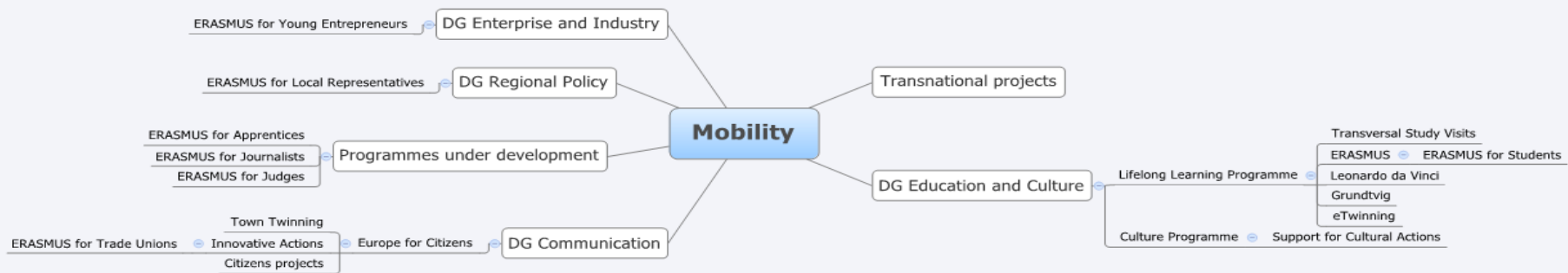
Europe for Citizens supports mobility of both civil society organizations and citizens. Mobility schemes for civil society organisations help stimulate debate and develop capacity; citizens' mobility (of very short duration) is supported mainly through town-twinning activities. However, overall there is scope to provide more opportunities to explore and develop trans-national mobility for civil society.

[79] Article 1.2 of decision no 1904/2006/EC establishing the programme.
[80] Report of the High Level Experts Forum on Mobility "Making learning mobility an opportunity for all", July 2008, http://ec.europa.eu/education/doc/2008/mobilityreport_en.pdf

As part of the study we have drafted a number of "mind-maps" (included below), which we use to capture as complete a picture as we can of the mobility landscape relevant to citizenship. The structure does not imply any cause and effect relationships, or prioritisation of one issue over another.

Mobility

Demand

Target group
- Professionals
  - Teachers
  - Journalists
  - Law enforcement
  - Policy makers
  - Other public sector representatives
- Citizens
  - Hard to reach
    - Health
    - Environment
    - National minorities
    - Women
    - People with disabilities
    - Youth
    - Disadvantaged people
  - Other?
- Intermediary organisations
  - Social partners
  - Municipalities
  - Sectoral bodies
  - NGOs
  - Think tanks
  - Research institutes

Thematic
- Migration
- Environment
- Gender/equal opportunities
- Social inclusion
- Human Rights
- Remembrance
- Heritage
- Economic crisis

Barriers
- Lack of interest
- Funding
- Lack of priority
- Practical difficulties, logistics

Scale/volume
- Unmet demand
- Is there a demand

Type
- Content driven
- Experiential
- Geographical imbalances

Supply

Mobility in the EfC
- Contribution to objectives
- How mobility can contribute
- Under which circumstances
- To which extent the current arrangements contribute

Capacity of the sector
- Fragmentation
- National vs international framework
- Thematic Fragmentation

Other mobility schemes
- Culture
- Education
- Enterpreneurship
- Gaps/under-represented target groups

Funding

Best practice

Understanding mobility

Why
- Exchanging and networking
  - Action driven
  - Policy oriented
- Capacity building
- Task/programme development
  - Action driven
  - Policy oriented
- Experiential/soft

How
- Dosage
  - Short term vs. long term
  - Frequency
- Wide spectrum of mobility schemes
  - E-mobility
  - Task driven
  - National
  - International
  - Inside EU
  - Outside EU countries

Who
- Over-represented vs. under-represented
- Intermediaries and multipliers
- Citizens/individuals
- Specific professions

Need

How to measure success
- Indicators
- Ownership

High level objectives
- Civic participation
- European Citizenship Space
- European identity

Relevance
- Timing
- Subject

Targeted effects
- Attitudes
- Openness
- Colaborations
- Sense of identity
- Shared values
- Europeanness

Impact/evidence of impact
- Different types of mobility: which contributes the most to the EU's objectives
- Outcomes: tangible vs. soft
- Effectiveness/cost effectiveness
- Scale: quality vs. quantity

45

ERASMUS for Young Entrepreneurs — DG Enterprise and Industry

ERASMUS for Local Representatives — DG Regional Policy

Transnational projects

ERASMUS for Apprentices
ERASMUS for Journalists — Programmes under development
ERASMUS for Judges

Mobility

DG Education and Culture

Lifelong Learning Programme

Transversal Study Visits
ERASMUS — ERASMUS for Students
Leonardo da Vinci
Grundtvig
eTwinning

Culture Programme — Support for Cultural Actions

Town Twinning
ERASMUS for Trade Unions — Innovative Actions — Europe for Citizens — DG Communication
Citizens projects

Study findings so far

Preliminary stakeholder feedback

A preliminary series of consultations with stakeholders has helped to identify the emerging challenges and issues:

- There is a perception that while the Commission engages effectively with EU–level networks, it finds it difficult to interact with individual citizens and therefore lacks understanding of citizens' real needs. There are concerns around the extent to which intermediaries represent the views and concerns of citizens accurately, although there is little consensus on how this challenge might be addressed. However there may be general agreement that certain categories of citizen are currently under-represented in mobility activity; and individuals in particular are less well placed to take advantage of existing schemes, compared with organizations.

- Whilst e-mobility or virtual mobility is a useful tool, participants in mobility programmes need to have tangible exchanges or events in order to ensure buy-in and long term commitment. Increasingly, social media can play a role in bringing people together, but not to the complete exclusion of face-to-face contact.

- Mobility in its various forms can be more effective if it is based upon a specific, concrete theme, interest or task; rather than on a rather widely defined or abstract concept. So content is as important as action; which also promotes long-term engagement and sustainability.

- A distinction may be made between individual and collective mobility actions and it is important to understand where and how the benefits of these are felt. This helps in turn to understand how incentives need to be set up to deliver optimum impacts.

- Organisational twinning, mentoring schemes and focusing on multipliers can offer significant potential.

BRIEFING PAPER

Second Workshop on "Shaping the Future of EU Civil Society Mobility Schemes"

Tuesday 8th February 2011, 0900-12.45

To be held at the European Commission, Place Madou 1210 Brussels, Belgium
(COMM MEETING ROOM DIR C MADO, 6th floor: 115-118)

Introduction

This event is the second of two workshops that are part of a European Commission study, which is exploring how to maximise the potential of mobility in building European identity and promoting civic participation in the EU; and to better target future actions.

The first workshop, held in Brussels on 18th November 2010, drew on the experience, expertise and perspectives of stakeholders to better understand the current situation and identify possible strategies and priorities.

This second discussion will use real-life examples of mobility–related schemes, (gathered by the research team), to **address possible strategies in more depth** and **how impacts might be maximized**. This will assist in **developing a set of indicative operational models**, tailored to the specific needs of the study's target groups.

At this workshop participants will hear a report back on the stakeholder interviews, including some insights from some specific case studies. We will also present and discuss our initial findings in relation to the parameters and an open, interactive discussion will help fine tune and filter the elements. We will then discuss the inter-relationships between parameters and the capacity that may be needed to embed them. From this, the workshop will move towards the key elements of possible operational models.

Study progress

The initial phase of this assignment focused on identifying possible strategies and priorities. The purpose of the current phase of the study is to explore these priorities in greater depth, through developing potential operational models for capacity building. Primarily this involves identifying good practice which would facilitate greater participation, especially amongst organisations with a significant "multiplier effect".

The research strategy has been to identify and seek opinions from a cross-section of organisations and/or schemes (with a geographical and sectoral balance), including stakeholders from different sectors (public and private), at EU, Member State, regional and local levels.

Interviews have included individuals with significant experience and expertise in mobility activities, and have focused in particular on the question of developing the types of capacity development which will facilitate organisations to engage initially in a mobility opportunity and then on a sustainable basis. Topics addressed include an assessment of:

- Background information on the organisation;

- Overall experience with mobility schemes (including good and bad practice);

- The importance of defining objectives and focus;

- Selection, number and location of trans-national partners;

- Activities (for example placements, workshops, studies);

- People participating in mobility opportunities;

- Time planning and time scale;

- Financial aspects;

- Internal organisation and capacity;

- Involvement of stakeholders, including wider community.

Parameters

The initial step following the interviews is to identify "parameters" – factors that have been drawn to our attention by stakeholders, and which provide tentative indications about the key features of any scheme aimed at maximizing the potential of civil society mobility. Each parameter is made up of elements drawn from the mobility schemes which we have explored in the course of this research and which we may consider as examples of good practice or innovative ways of working.

This framework of parameters and elements includes the necessary requirements to make a scheme work. Our research thus far indicates the initial list set out below. These will be discussed and developed further at the workshop.

Parameters	Elements
Objectives	➢ To build capacity ➢ Civic participation ➢ Increased participation ➢ Contribute to building EU identity
Target Group	➢ Civil Society Organisations at different levels ➢ Other Civil Society actors ➢ Harder to reach applicants
Finance	➢ Timing of cash-flow, payments ➢ Lump sums versus variable rates ➢ Reimbursement of administrative costs (per head or aggregate) ➢ Co-funding, match funding, sponsorship (CSR) ➢ Seed funding/pump priming, sustainability
Structure	➢ Intermediaries ➢ Centralised direct/indirect ➢ Recruitment ➢ System based approach/project based approach

Parameters	Elements
Support for Target Group	➢ Administrative, ease of making applications ➢ Technical/thematic (expertise) ➢ Peer learning (and staff development) ➢ Individual learning/Organisational learning
Activities	➢ Preliminary visits ➢ Study visits ➢ Exchanges ➢ E mobility ➢ Projects

Operational models

In some cases, the individual elements may be in conflict with each other. In other cases, they may be interdependent and some elements may be seen as far more important than others. Elements will be used (perhaps in different combinations) to develop potential operational models.

The diagram below provides a proposed basic structure for an operational model, whereby a number of different models may be defined by combining different elements described above, in order to develop a particular scheme.

Operational Model to be developed at workshop
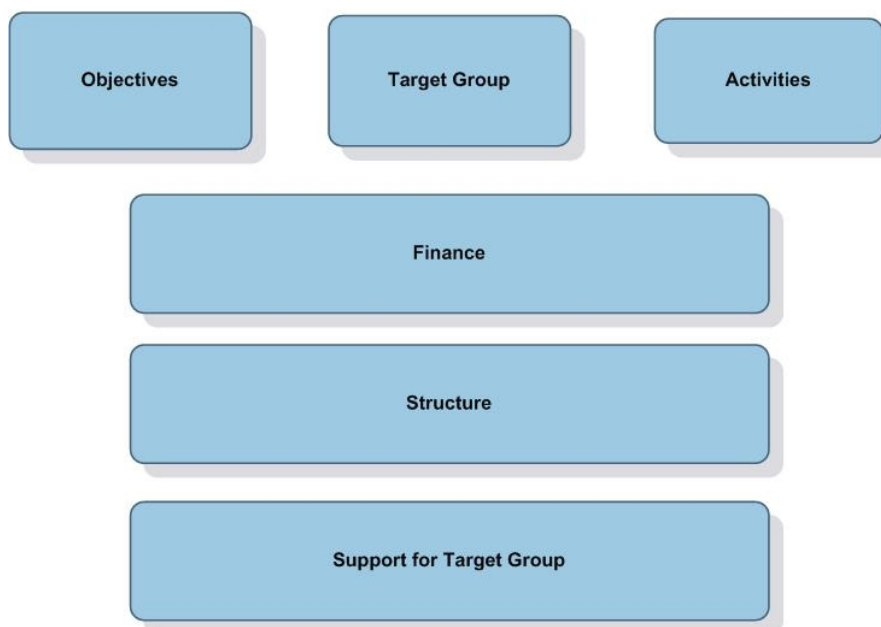
Following completion of the interviews (February 2011) and the second workshop discussion, we will analyse the results and elaborate operational models which **will encompass key elements for developing the capacity**

required to engage in mobility opportunities initially and then on a sustainable basis. The models will be more than just case studies, as we will draw from the experiences to elaborate general models.

Annex Six: Workshop Reports

Report on Workshop: "Shaping the Future of EU Civil Society Mobility Schemes"

Renaissance Brussels Hotel, 18 November 2010

Introductions

The workshop was part of a study being carried out by Ecorys on behalf of the European Commission, which is exploring how to maximise the potential of mobility in building European identity and promoting civic participation in the EU; and to better target future actions.

The aim of the event was, through interactive discussion and debate, to draw on the experience, expertise and perspectives of stakeholders in order to:

1. Identify specific mobility needs;
2. Highlight existing schemes that respond to identified needs (including best practice and examples where lessons may be learned);
3. Identify gaps and what kind of provision is still required.

DG COMM provided an introduction and overview of building European identity and promoting civic participation in the context of the study and then set the scene for the workshop against the background of the Commission's objectives and current activity in this field.

Ecorys provided an overview of the study, the purpose, aim and objectives of the workshop and highlighted some emerging findings to date. The full presentation can be found in Annex 2.

Mobility – the meaning and definition

A key objective of the study is to explore definitions and meanings of "mobility" and the opening discussion of the workshop took as its starting point the High Level Expert Forum on Mobility's definition:

"Transnational learning mobility should be understood <u>in a broad sense,</u> as a structured period of time spent in another country, undertaken with a specific learning objective. It therefore goes beyond the kind of formal study supported through the Erasmus programme and includes informal learning and knowledge acquired through exchange of ideas with peers and volunteer activities."

There was wide agreement that this definition was very valuable and, appropriately, captured the breadth of activity that could be encompassed by the term mobility. In particular there was a strong belief amongst the group that the most important dimension of mobility was learning. However, there was also a discussion about the importance of mobility adding value to European Society i.e. there is no point in mobility achieving everything in the High Level Experts Forum's definition if there is no net benefit to European society. For many, their own personal experience was highly illustrative: Mobility can be life-changing, acting as an initial trigger for thinking differently and being exposed to different cultures etc. The general consensus was that having a European 'experience' broadens horizons; but also that the initial opportunity is not always rational or predictable. The discussion also focused on the importance of mobility in providing exposure for individuals or organisations to new ideas or concepts, and that this could lead to a step change in behavior or understanding.

The key here might be to provide greater opportunity for and awareness of mobility. People become interested in policies and activities at EU level for a range of reasons; some rooted in an attraction to the European environment, others prompted by experiences at national a level (for example where EU policies and regulations have an impact on everyday life, in a particular sector or through a specific issue of concern). Whatever the trigger or motivation these mobility experiences are linked by the common need to learn more.

It was also recognized that because the term mobility covers such a wide range of themes, there was a risk of loss of focus (examples raised concerned mobility in the sense of transport and of in the field of work). Qualifying the term by adding 'transnational' and 'learning' therefore goes some way towards clarifying the type of activities relevant to building European identity and promoting active citizenship. The group also agreed that 'exchanges' was a useful phrase and that often mobility could be interchanged or replaced by the word 'exchange'. Again, this assists in capturing the necessity for mobility to bring together different perspectives, even within the same field of interest, and of learning from others something which can be taken 'back home' and applied.

For example, drawing on the experience of the 'Erasmus for Trade Unions' initiative (supported under the Europe for Citizens programme), the European Trade Union Confederation commented on the benefits of similar organizations in different countries undertaking exchanges or periods of work in different countries, as it helps employees to understand why organizations in different countries address issues in a particular way and how good practice can be shared with organizations across the EU. There were enough similarities for the Trade Union's in different Member' States to have something in common, but enough differences so that learning was still able to take place.

In terms of understanding what types of learning mobility is required in the civil society field, the group agreed that an experience (or exposure), through mobility, needed to create and demonstrate some form of added value if it is to deliver the kinds of results the Commission is seeking (i.e. in terms of contributing to the EU's policy objectives concerning building European identity and promoting civic participation). In exploring the potential connection between these two policy goals the question was raised whether some schemes or activities had a stronger role to play than others (for example if we consider students taking part in the 'original' Erasmus programme, where the primary goal is an academic and cultural one). However it was also noted that people who have benefitted from EU support to undertake mobility schemes may well be likely to contribute to civic participation.

In terms of why people come together, it was commented that there is a very significant (un-met) demand for information about EU policies and institutions; much greater in fact than is commonly believed.

In coming to some conclusions on the broad question of what mobility means and how it links to building European identity and promoting civic participation, we can say:

- Potential confusion and lack of focus arising from the openness of the term 'mobility' can be addressed by recognizing and using the term 'transnational learning mobility';
- In considering potential impacts of learning mobility it is particularly important in the field of civic society to pay close attention to the balance of difference and similarity between the individuals and/or groups taking part in exchanges;
- Learning mobility can address a range of needs and demands: peer–to-peer exchange between shared interest groups, but also in terms of the general appetite for more information and knowledge about EU-level activity (in line with the importance of informal learning expressed in the HLEP definition);
- People come to engage with EU-level policies, issues and activities for a wide range of reasons, and mobility in its various forms is an important enabler;
- While it can seen as a foreground or the background dimension, and as a direct or indirect effect depending on the way individual schemes are constructed, civic participation may nonetheless be considered as a cross cutting theme within most mobility schemes.

People, activities and objectives

The next part of the discussion was guided by the following themes and questions:

People

In terms of existing mobility scheme, including those that are well established, some new initiatives and pilot actions currently under development, the discussion considered the extent to which there was a distinction between schemes aimed at particular groups and those based on a specific theme.

The proposed 'ERASMUS for Journalists' action, currently being evaluated by DG Information Society and Media provided an interesting example. Research on the feasibility of this initiative indicates that for potential participants the demand is primarily for opportunities to learn about different people, their culture, life and traditions; secondly for the professional element of exchanges and finally for learning more about EU institutions. This provides an interesting perspective, where although initiatives focus on a quite specific target group, the desire for exchange and exposure to people and contexts different to one's own is at least as strong as the desire to engage with fellow professionals. Targeting specific groups of participants may therefore be conceptually less important than the underlying and fundamental drivers of informal, cultural learning. Grouping by profession or any other criteria may simply be a means to define a client group for operational purposes, while giving an initial and sufficient degree of compatibility to ensure some common ground for engagement. This also seemed to echo the experience of the trade union sector.

Clearly there are valid reasons to consider certain groups for mobility; linked to the idea of multipliers in society (we know for example that journalists can have an influence on public debate, but equally we should be wary that schemes are not perceived as an attempt to obtain favorable coverage for the EU institutions). This then raised the question of how to define civil society in the sense of which individuals, organisations and sectors should be included. Initially, it was agreed that civil society did include everyone; private enterprises, NGOs, local and regional government and it was noted that the European Commission itself does not have a definition, but that one is under development. It was however confirmed for the purposes of this study, and the operation of any potential future programme, that participant organisations had to operate on a not-for-profit basis, therefore normally excluding businesses. However, where businesses or sector bodies were engaged with issues of general interest (for example via Corporate Social Responsibility activity), rather than simply engaged in furthering the interests of their own company or industry sector, then they might be eligible.

The Commission added that the current study had its origins in a meeting in 2008 where it was suggested that some form of town twinning arrangement for civil society organizations would be beneficial.

It was noted that individuals could not participate in schemes without having a focus or theme (such as being a lawyer of Trade Unionist) as this would make programmes unmanageable. It was however pointed out that opportunities for citizens to participate directly (via citizens panels) did exist, under Action 1: Active Citizens for Europe of the Europe for Citizens programme for example.

Activities

A number of people made the point that e-mobility was useful, but that creating an online community presented a significant challenge. A number of organisations suggested that Blogs were difficult to sustain and they had encountered difficulties in terms of achieving sufficient levels of engagement and participation with these types of tools. It was recognised that management of such activities had to be proactive, including the use of moderators in discussion for and tying in online activity with meetings and events to boost interest. Above all, it was agreed that online activity needs to be strongly content-driven.

E-twinning is the European Commission's partner finding and online collaboration tool which is a part of the Comenius Programme, was highlighted as a good practice example of e-mobility. The key feature here is that it provides a support service which facilitates the linking up of schools, so it does not fund project activity directly. As an enabler or facilitator it has attracted relatively high levels of participation in the education sector across Europe.

Recognising that there was still a significant role for 'traditional' approaches, it was also suggested speaking at conferences was an effective way of spreading the message and providing information to people. This again reflects an inclusive and broad definition of learning mobility, acknowledging the precedence of learning objectives and content over process.

In the same vein, there was discussion around types of mobility: individual mobility and group mobility, and also exploring the benefits of perhaps ensuring that a senior and a junior member of staff take part in an exchange or experience, to ensure the impact is greater when they return to their organisation. It was felt this would ensure buy-in from management and allow more junior members of staff to learn from the experience (reflecting on the opening round of discussion concerning the importance of 'trigger' experiences').

It was agreed that all programmes should be funded on a multi annual basis in order to ensure as much continuity and stability as possible for the organizations involved.
The length of activity should be determined by the individual projects and will depend on the target group. For example, the ERASMUS for Trade Unions scheme offers a flexible approach which can be changed depending on family/work commitments etc (i.e. a one month stay split into two blocks). It was also agreed that an appropriate balance needs to be struck between recruiting new organizations to civil society mobility schemes and providing support to those that are already participating.

Objectives

The discussion on the objectives of any enhanced civil society mobility schemes focused on:

> ➢ Linking operational objectives to EU policy objectives;
> ➢ Capacity building;
> ➢ Sustainability.

It was agreed that objectives and specifically learning objectives, should be the main drivers in elaborating EU-supported activity, focusing on understanding policy goals at a practical level (so avoiding recreating another version of the intervention logic of the current programme, but rather achieving a more detailed understanding of how these can guide 'a new initiative'). This means there should be a hierarchy of objectives, where the highest level objective or purpose would be to enhance engagement with European civic society and policy making, underpinned by more

specific programme level objectives. Individual projects /schemes would have their own specific but compatible objectives and outputs and, crucially, 'building European identity' should be a cross cutting theme.

Consideration of who should be involved and in what activities should they be involved must then be determined by the objectives set. Then, consideration of mechanisms and operational models can follow.

In terms of capacity building, it was recognised that this was a term which is widely used but perhaps less well understood in terms of detailed implications. In order to move forward with the study it will therefore be necessary to unpack this objective, perhaps identifying its key dimensions, and providing guidance in terms of the types of the practical examples (operational models) we will looking to identify in the next phase of the study.

Conclusions

Overall the results of the workshop have provided a number of key strategic priorities and principles that provide strong direction for the next phase of the study:

1. The broad definition of transnational learning mobility is considered highly appropriate for the civil society field and is strongly endorsed;
2. People come to engage with the EU level via a variety of routes (either based on a general interest or stemming from a particular thematic issue, often triggered at a local, regional or national level);
3. At the same time there is continuing, strong demand for 'basic' information about the EU from a wide range of citizens and citizen groups (this in turn has the potential to trigger deeper engagement);
4. In cases of schemes that focus on particular target groups, the dimension concerning exchange between people from different backgrounds may be as important as the opportunity to engage on a purely professional level (so more specific schemes may simply provide a convenient and pragmatic entry point to engage different people in mobility);
5. E-mobilty has a positive role to play and social media also offers significant potential, in terms of project-level activity (facilitating the building of partnerships and increasing participation for example), as well as for the EU institutions to engage with citizens.
6. There is significant unmet demand from civil society, but building capacity (in terms of where mobility can make a difference) is one of the main challenges where EU support is needed.
7. The different dimensions to capacity building need to be understood in greater detail (within the context of civil society), to enable the study to move forward and start to offer concrete conclusions and recommendations.

ECORYS November 2010

Annex 1: Workshop Attendees

Attendees

Name	Company
Joana Vieira da Silva	Citizens' Policy, DG Communication
Cécile Le Clercq	Citizens' Policy, DG Communication
Melania Marian	Citizens' Policy, DG Communication
Joachim Ott	Citizens' Policy, DG Communication
Manuella Portier	Council of European Municipalities and Regions (CEMR)
Kim Leonard Smouter	European Network of National Civil Society Associations
Gabrielle CLOTUCHE	Confédération Européenne des Syndicats
Helene CIPRIANO	Confédération Européenne des Syndicats
Vanessa Holve (represented by Sabine Israel)	Eurocities
Kalman Dezseri	DG INFSO
Stephanie Lepczynski	Lisbon Council
Ann Mettler	Lisbon Council
Clelia Casalino	ECAS
Laura Veart	Ecorys
Neil McDonald	Ecorys
David Jepson	Ecorys

Annex 2: Ecorys Presentation

Workshop: Shaping the Future of EU Civil Society Mobility Schemes

Renaissance Brussels Hotel
18 November 2010

Andrew McCoshan, Neil McDonald, Laura Veart and David Jepson

Sound analysis, inspiring ideas

ECORYS ▲

Study

"Maximising the potential of mobility in building European identity and promoting civic partnership in the EU"

Objectives

…a critical review of existing practice to inform an analysis of what steps might be taken to make trans-national civil society mobility more effective

…provide a better understanding of the capacity of civil society actors to participate

…inform the development of possible approaches and options through identifying success factors in existing schemes

Review of existing schemes, stakeholder consultations, two workshops, operational models

Sound analysis, inspiring ideas

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Key dimensions

- Need/demand – the nature of the problem to be addressed

- Supply – capacity to respond to needs

- Added value – targeting European added value

- Approaches, models and mechanisms – translate successes to EU level

Timetable

Start: August 2010

Final Report: end February 2011

Sound analysis, inspiring ideas

ECORYS
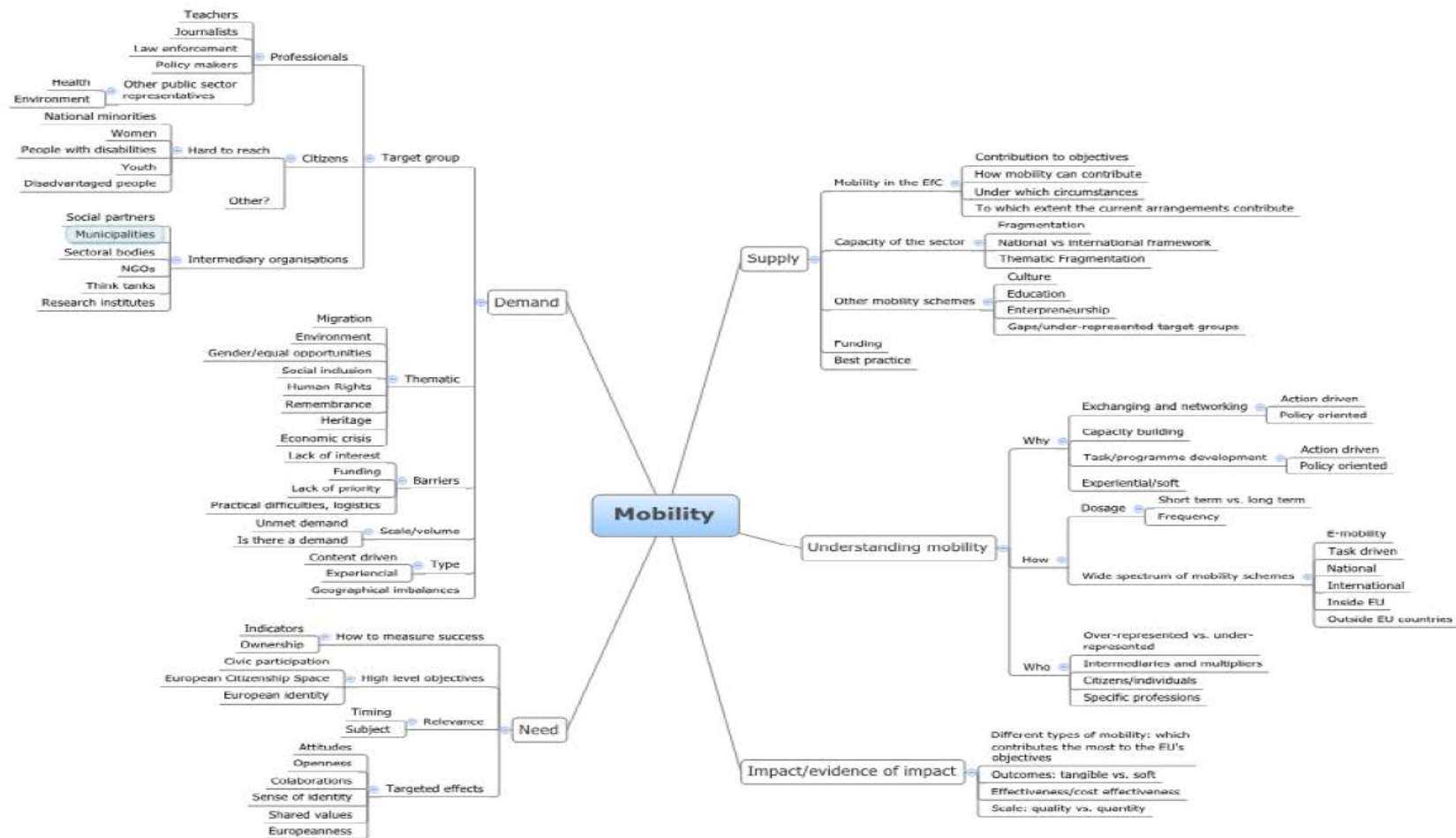
Stakeholder feedback so far....some key issues

➢ Commission engagement - networks, organisations, individuals.

➢ Certain categories of citizen are currently under-represented in mobility activity; and individuals in particular are less well placed compared with organisations.

➢ e-mobility or virtual mobility is a useful tool, but not to the complete exclusion of face-to-face contact.

➢ Mobility can be more effective if based on a specific themeor task; which also promotes long-term engagement and sustainability.

➢ The benefits that are delivered are different for individual versus collective mobility actions.

➢ Organisational twinning, mentoring schemes and focusing on multipliers offer significant potential.

Sound analysis, inspiring ideas

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WORKSHOPS

Two - one now one in January 2011

> **Workshop 1:** focus on current situation and identifying possible strategies and priorities

> **Workshop 2:** In-depth assessment of possible strategies and how to maximize impacts

Today's objectives:

- **Identify specific mobility needs**

- **Highlight current schemes**

- **Identify gaps**

Sound analysis, inspiring ideas

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Defining Mobility

Transnational learning mobility should be understood <u>in a broad sense,</u> as a structured period of time spent in another country, undertaken with a specific learning objective. It therefore goes beyond the kind of formal study supported through the Erasmus programme and includes informal learning and knowledge acquired through exchange of ideas with peers and volunteer activities.

High Level Expert Forum on Mobility

Sound analysis, inspiring ideas

ECORYS ▲

AGENDA

Time	Agenda	Description
9.00 - 9.30	Arrival and coffee	
9.30 - 9.45	Introduction – European Commission	Building European identity and promoting civic participation
9.45 – 10.15	About the study - Ecorys	Brief introduction to the study aims and objectives, and findings so far. Introduce the issue of "mobility" as a topic for discussion and validation of a shared definition. Explanation of the workshop objectives and activities.
10.15 – 11.15	Small-group discussion	Participants work in small groups to discuss how the potential of mobility might be maximised in terms of the three building blocks of: (1) people (2) activities (3) objectives ...to formulate their top three priorities for each.
11.15 – 11.30	Coffee	
11.30 – 12.30	Identifying strategic priorities (reporting back)	Groups report back, followed by a plenary discussion to identify top four strategic priorities.
12.30 – 13.00	Conclusions	Summing up and final remarks
13.00 – 14.00	Lunch and departure	

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WORKSHOP QUESTIONS

People
• Which types of organisations are currently not involved enough, which should be, and what would the benefits of this be?
• Which individuals might be more involved, and what would the benefits be?
• Who are the potential 'multipliers' - people or organisations with a high potential to influence change?

Activities
• To what extent are certain types of activity appropriate for certain target groups?
• How effective is the approach adopted by the EU (focus, structures, programmes etc.)?
• What can we learn from current schemes?

Objectives
• What should the objectives of any future initiative be?
• What goals should it address as a priority (e.g. capacity building, peer-to-peer exchanges, networks, individuals, sectoral/thematic approaches etc.)?
• How might these needs best be met in future (e.g. centralised versus decentralised structures)?

Sound analysis, inspiring ideas

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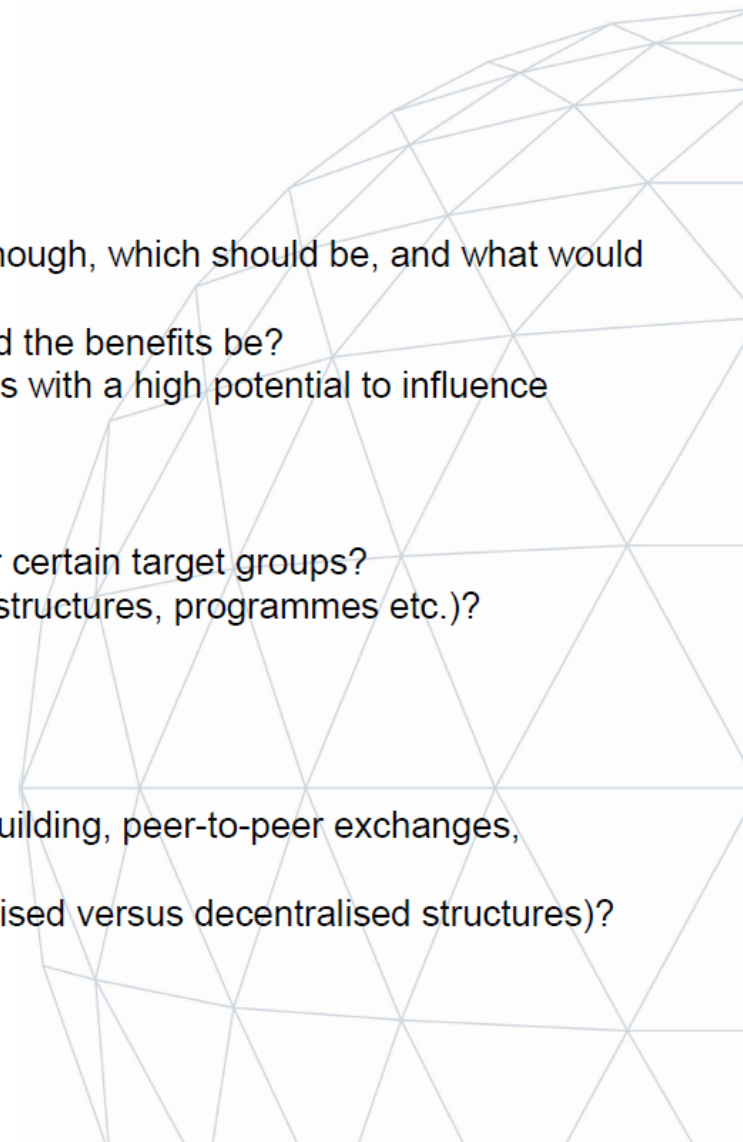
Workshop: Shaping the Future of EU Civil Society Mobility Schemes

Brussels 18 November

Sound analysis, inspiring ideas

Report on Workshop 2: "Shaping the Future of EU Civil Society Mobility Schemes"

European Commission, Brussels, 8 February 2011

1. Background and introduction

The workshop was the second of two such events organised as part of a study being carried out by Ecorys on behalf of the European Commission, which is exploring how to maximise the potential of mobility in building European identity and promoting civic participation in the EU; and ways to better target future actions.

The first workshop, held in Brussels on 18th November 2010, drew on the experience, expertise and perspectives of stakeholders to better understand the current situation and identify possible strategies and priorities.

The aim of the second workshop was to use real-life examples of mobility–related schemes, (gathered by the research team), to address possible strategies in more depth and discuss how impacts might be maximized; with a view to developing a set of indicative operational models, tailored to the specific needs of the study's target groups.

The workshop was structured into two main parts: firstly, a report by the study team to present key learning points from some specific schemes being explored and the analytical approach being followed. Secondly, an open, interactive discussion aimed at helping to refine and inform these findings, focusing on the inter-relationships between the key features of any new or re-engineered civil society mobility scheme, the capacity that may be needed to embed these measures and on moving towards a possible operational model or models.

DG COMM welcomed participants and provided an introduction and overview of building European identity and promoting civic participation in the context of the study and then set the scene for the workshop against the background of the Commission's objectives and current activity in this field. Ecorys invited participants to provide brief résumé of their role and expectations of the workshop. A list of participants is included at Annex 1.

2. Emerging findings

Ecorys made a presentation which outlined the main objectives of the study, recalled the results of the first workshop and set out the objectives of the second workshop. The study team explained how the research carried out since the first workshop in November 2010 had been exploring a wide range of real operational models in order to learn about how activities are structured, resourced, targeted and evaluated. Dimensions of interest have also included meeting and managing demand, unlocking capacity and delivering tangible benefits to individuals and organizations. It was emphasized that as wide a range of schemes as possible had been investigated, including those involving EU-level NGOs, trade unions, EU DGs, the private sector and bi-lateral and pan-regional initiatives.

The **initial findings from a selection of the schemes studied were presented**, by highlighting key elements of the approaches that have particular relevance to the target group for the study. These elements may be grouped under a series of **five parameters**: objectives; target group; activities; structures; finance; and support for beneficiaries. These in turn may be considered the **building blocks of operational models for a future mobility scheme**. Using this analytical approach, selection of the appropriate elements for each parameter, ensures the benefits of any proposed scheme are maximized. Drawing on the results to date, Ecorys proposed a set of elements for discussion, which are considered to be particularly germane:

Elements	Parameters
➢ To build capacity ➢ Civic participation ➢ Increased participation ➢ Contribute to building EU identity	**Objectives**
➢ Civil Society Organisations at different levels ➢ Professionals ➢ Other Civil Society actors ➢ Harder to reach applicants	**Target Group**
➢ Preliminary visits ➢ Study visits ➢ Exchanges ➢ E.mobility ➢ Projects	**Activities**
➢ Intermediaries ➢ Centralised/decentralised, direct/indirect ➢ Recruitment ➢ System based approach/project based approach	Structure
➢ Timing of cash-flow, payments ➢ Lump sums versus variable rates ➢ Reimbursement of administrative costs (per head or aggregate) ➢ Co-funding, match funding, sponsorship (CSR) ➢ Seed funding/pump-priming, sustainability	Finance
➢ Administrative, ease of making applications ➢ Technical/thematic (expertise) ➢ Peer learning (and staff development) ➢ Individual learning/Organisational learning	Support for Target Group

The full presentation can be found in Annex 2.

3. Discussion

The first part of the discussion started by considering the **importance of objectives and target groups**: it was agreed that the starting point in terms of the orientation and scope of any new mobility-related measure must be that the aims of the activity is aligned to the core work of the organization (and individuals) involved. At the same time, to ensure added value at the European level, the overarching goal must remain firm – to encourage and promote ownership of democratic institutions and processes, increase direct participation and foster an EU 'public sphere'. The long-running success of existing schemes, notably Europe for Citizens, was acknowledged, while the need to meet high demand in certain more specific areas was also recognized. The breadth of the objectives within the Europe for Citizens allows widespread appeal and scope for participation by a wide range of target groups. However, this may make it challenging to reach and satisfy specific needs and to manage demand effectively (in the sense that the likelihood of successfully applying for funding varies significantly across different actions).

This issue of **the strengths and weaknesses of a broad versus 'narrower' approaches** (essentially a question of how the eligibility criteria and objectives are set, and at what level they are set), was explored further by considering **the experience of other schemes.**

Firstly, the forthcoming **pilot action on Erasmus for Journalists** will define its target group simply by requiring some form of set criteria (validation or professional accreditation and years of experience), after which places on the scheme will be filled on a first-come-first-served basis. This is in part a result of the relatively modest funding available for the pilot, since the administrative cost required to operate a 'traditional' application and selection process would be inefficient. This is an effective way to direct support to a very specific target group via an 'assumed' objective, where the rationale is almost inherent in the choice of target group (to expose journalists to other European contexts and to foster a greater awareness of and interest in EU affairs). Here there is also clearly an objective to bring about change at organizational level, although the individual is the initial beneficiary of the mobility. This dual objective is very relevant to the NGO sector and was one of the key elements explored in the study examples – in the commercial examples for instance there is clearly an overarching (economic but also cultural) rationale, while for the individual career development is a desirable outcome.

It was highlighted that the NGO sector is characterized by a relatively high degree of heterogeneity, so that it is more challenging to apply common rules and ascribe common motivations, between for example NGOs working in different policy fields. Social NGOs in particular have different ways of working, are very project-based, and often struggle to secure long-term funding (a particular issue when we are talking about mobility of individuals having effects on organizations over time). To meet the needs of NGOs a mobility scheme should not be too closed: however neither should it be too open.

The **Nordic Council of Ministers mobility scheme for supporting Baltic NGOs** offered another valuable insight into the question of how broadly or narrowly to draw objectives and target groups. In this case, the scheme is stratified by theme while the overarching objectives are drawn quite broadly. The challenge for the scheme now is that demand is outstripping supply by a significant margin. While this is a sign of success, for NGOs in particular it means that many organizations are being frustrated in their efforts and using scarce resources against a relatively low chance of success. This scenario is also of concern for certain actions of the Europe for Citizens (e.g. Innovative Actions). The solution may be a combination of changes to process (for example wider use of pre-application or filtering mechanisms) and/or tighter definition of target groups and eligible activities.

It was highlighted that for a number of programmes (including several large EU ones), significant levels of assistance are available for applicants – one of the schemes investigated by the study team was the **Grundtvig Senior Volunteering Action**, which sits within the Lifelong Learning programme and as such brings with it the back-up of the relevant National Agencies. Other EU schemes also have an **established infrastructure of intermediaries and support agents** – in the research field and under the Culture Programme for example. In this respect the Europe for Citizens Programme includes the 'Europe for Citizens Points' (PECs), although these are relatively recent. It was remarked however that **NGOs would feel more confident engaging with other NGOs rather than public agencies**. Debate then focused on the extent to which NGOs could benefit from more support of the types enjoyed by other sectors. For example, the idea of having **a marketplace for NGOs** where opportunities (for secondments, projects etc.) could be posted was discussed. This wider issue of an **information deficit** was explored in more detail and among the issues raised was the role of the ECCPs and the need to build their capacity and perhaps take a **stronger future role in dissemination and building partner contact databases.**

The **People to People scheme** (P2P)[1] run by DG Enlargement was discussed. This is a component of TAIEX (the Technical Assistance and Information Exchange instrument), which has provided **peer-to-peer support** to some 2,500 people since 2008, **via study tours for selected EU-level civil society organisations**. Participants are selected by TACSO[2] and EU Delegations in the (EU candidate and potential candidate) countries concerned. There is a target group, but no target subject (a wide range of themes is permitted). Typically a study tour group comprising four people from each country visit EU institutions in Brussels over a period of five days. Participants need to report on what they have experienced (for example via a local newspaper) and a rigorous evaluation system is in place. The main beneficiaries are not large NGOs but the smaller, less well-funded ones and subject areas are decided in conjunction with other DGs including REGIO for example. DG Enlargement also coordinates the LAF programme for local municipalities – here, 50 or so participants take part in study visits to Brussels. Clearly the overarching priority for these schemes concerns exposing potential agents of change and multipliers from government and civil society in candidate countries to promote the types of activities and approaches that characterize sound 'European' governance of economy and society.

Discussion on 'end-users' established that for civil society actors, the key is to be more specific in terms of objectives, which should be informed by prevailing political priorities. In the case of the citizenship field these might be:

1. Enhance understanding of democratic processes and institutions;
2. Enhance engagement with specific EU policy areas: for example those in Europe 2020, and environment and climate change.

It was therefore agreed that any new scheme would have to be consistent with these in terms of target groups and objectives. Several project-specific objectives (for NGOs) were suggested that would fit within this overall framework, including:

- Improving understanding of the EU policy framework for NGOs concerned in certain thematic areas (examples might include reintegration of people with disabilities into the labour market; or exchange of best practice concerning the role of civic society in creating 'green' employment).
- Sharing knowledge and experience (for professionals) and including issues of recognition and validation of non-formal learning and volunteering.
- Engaging citizens directly.

The **lack of connection between large EU-level NGOs and smaller, national NGOs was highlighted and discussed**. There is **an information deficit about EU policy developments and activity seen from the perspective of local, regional and national NGOs**. This raises the potential that a new scheme might have to support exchanges between these levels. This would strengthen dialogue but is currently a challenge to implement since a project is needed as a vehicle or it has to be funded out of the ad hoc use of core funding for the NGO organizations. Such an activity was considered a potentially valuable activity and although there examples of good practice (e.g. Eurochild's study visits) and benefits for both sides, a highly-visible, sustainable funding stream is not presently available. EUROCIRCLE also provided examples of exchanges between social cooperatives, but where such an initiative has become stalled owing to the lack of an obvious, dedicated funding source.

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[1] http://ec.europa.eu/enlargement/taiex/p2p/index_en.htm
[2] Technical Assistance for Civil Society Organisations

4. Conclusions

Overall, the results of the workshop have provided a number of conclusions:

1. It is essential to achieve the **correct balance between top-down and bottom-up dimensions**. In practice this means ensuring that any supported activity is framed according to focused core global objectives at the top level, together with targeted eligibility criteria and results-orientated success indicators at the operational level.

2. Any new scheme should therefore have a **clear intervention logic**; comprising the overarching policy framework of ensuring European added value to citizenship through increased awareness, identity and engagement with the policy making environment at the European level, underpinned by a set of very carefully pitched programme and project-specific objectives which target real demand (through focused eligibility criteria and sectoral values – what is to be achieved, by whom and what the impact will be that contributes to EU added value); but where flexibility in terms of relevant activity is encouraged (how it is to be achieved).

3. **Clear specific objectives, allied with greater flexibility at the level of supported activity**, will also help to meet actual demand more accurately. This degree of flexibility (concerning duration and types of activity and encompassing placements, study visits, mentoring and training etc.) must be accompanied by a strong focus on outputs, results and impacts. Greater flexibility might also apply to changing activities and expenditure through simple procedures.

4. **Clear signals and information** also needs to be conveyed to potential applicants **to avoid frustration and unnecessary costs** – this can be achieved by a variety of means including more developed information and advice services, using a filtering or pre-selection stage in the application process; but also by having more focused calls or work programme items within programmes. Application might for example be through frequent 'windows' related to specific sub-objectives.

5. **Target groups** should include organizations and individuals but **participation should be primarily for organizations**. The link between these should be recognized explicitly – **mobility by individuals should have clear organizational impacts**. Individuals may be professionals in the wider sense (i.e. those working in NGOs).

6. **Applications** from participants **across sectors** (for example between NGOs and government) **and between levels** (local/regional, national, EU), as well as between policy areas should be encouraged in order o make better use of existing capacity and add value to the policy framework.

7. There is a strong argument to consider **developing stronger support mechanisms for civil society NGOs** (at all levels) to provide them with more systematic information on opportunities for twinning and exchanges and applying for funding (market-place type websites for example, help lines and contact databases). This might be done through existing national agencies or EU contact points, or by for example tendering a service contract that could be run by NGOs themselves.

ECORYS February 2011

Annex 1: Workshop Attendees

Attendees

Name	Company
Joana Viera da Silva	DG COMM
Cecile Le Clercq	DG COMM
Joachim Ott	DG COMM
Kim Leonard Smouter	European Network of National Civil Society Associations
Gabrielle CLOTUCHE	Confédération Européenne des Syndicats
Helene CIPRIANO	Confédération Européenne des Syndicats
Kalman Dezseri	DG INFSO
Stephanie Lepczynski	Lisbon Council
Ane Kofod Petersen	Nordic Council of Ministers
Marie Wittamer	EuroCircle
Marine Henry	Association of Local Democracy Agencies
Magdalena Kleim	DG Enlargement
Mafalda Leal	Eurochild
Neil McDonald	Ecorys
Nick McAteer	Ecorys
David Jepson	Ecorys
Ruud Van der Aa	Ecorys

Annex 2: Ecorys Presentation

Workshop 2: Shaping the Future of EU Civil Society Mobility Schemes

European Commission, Place Madou, Brussels
8 February 2011

Neil McDonald, David Jepson, Ruud vander Aa and Nick McAteer

Sound analysis, inspiring ideas
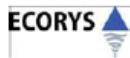
Study

"Maximising the potential of mobility in building European identity and promoting civic partnership in the EU"

Objectives

…a critical review of existing practice to inform an analysis of what steps might be taken to make trans-national civil society mobility more effective

…provide a better understanding of the capacity of civil society actors to participate

…inform the development of possible approaches and options through identifying success factors in existing schemes

Review of existing schemes, stakeholder consultations, two workshops, operational models

Sound analysis, inspiring ideas

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WORKSHOPS

Two – one in November 2010, second one in February 2011

Workshop 1: focused on current situation and identifying possible strategies and priorities

Workshop 2: In-depth assessment of possible strategies and how to maximize impacts

Today's objectives:

- Review results of investigations into a wide variety of mobility schemes

- Highlight key elements and parameters

- Use these to suggest how mobility schemes might be developed

- Move towards developing appropriate operational models that have the potential to unlock demand for civil society mobility

Sound analysis, inspiring ideas

ECORYS

AGENDA

Time	Agenda	Description
9.00 - 9.15	Arrival and coffee	
9.15 - 9.20	Welcome and Introduction - European Commission	
9.20– 9.35	About the study – Ecorys	Brief introduction to the study's aims and objectives, recall the results of the first workshop and set out the purpose of the second workshop.
9.35- 10.30	Present work in progress – Ecorys	Review examples from a wide range of mobility schemes across (EU, National, public and private sector).Results to date will be used to propose key operational elements which will inform the development of a small number of generalised models.
10.30 – 10.45	Coffee and pastries	
10.45 – 12.30	Developing operational models	Facilitated workshop discussion: Reactions and observations on operational elements (gaps and revisions) and linking elements together in order to move towards agreed operational models.
12.30-13.00	Conclusions	Summing up and final remarks

Sound analysis, inspiring ideas

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LEARNING FROM REAL OPERATIONAL MODELS

· Goal is to draw on as wide a range of experience as possible...

· We are exploring:

➢ EU-level NGOs

➢ Trade unions

➢ private sector

➢ EU DGs, EAC, INFSO, ENLG, RTD

➢ Bi-lateral and pan-regional initiatives

· We are learning about how activities are structured, resourced, targeted and evaluated

· We are learning about meeting real demand and what works well

· We are learning about unlocking capacity and delivering tangible benefits

Sound analysis, inspiring
ideas

ECORYS ▲

Nordic Council of Minsters: Support for Baltic NGO mobility

"NGOs play a prominent role in the Nordic Council of Ministers' co-operation with the Baltic States and Northwest Russia within a number of its priority areas, such as the environment and progress towards democracy, but also as partners in building networks and cross-border co-operation in the Baltic Sea Region."

Experience

➢NGOs do have capacity (significant expertise and experience is available)

➢Huge demand (four times the available budget)

➢Many repeat applicants

➢Co-funding is not a requirement (but 50% of 2010 projects had it)

➢In terms of activities the programme is very flexible (as long as the overarching objectives are set appropriately)

Sound analysis, inspiring
ideas

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Nordic Council of Minsters: Support for Baltic NGO mobility cont'd

Elements

- To build cooperation and partnerships - strengthen relations between the Nordic Baltic countries.
- Build capacity amongst NGOs
- To develop Nordic-Baltic co-operation in areas of common interest

- Civil Society Organisations
- In the 8 Baltic/Nordic countries - Russia, Belarus, Denmark, Norway, Estonia, Iceland, Sweden, Greenland, Latvia, Lithuania, Åland Islands, Finland, Poland, Faroe Islands

- 40% at start of project, 45% mid term and 15% when it is completed
- Co-funding is not compulsory to apply but co-funding is part of the assessment criteria.
- Seen as seed funding/pump priming.

- The Nordic Council of Minister administers the programme.
- They deal direct with the applicants.
- Recruitment via websites and conferences, but applications mainly come from those who have already taken part.
- At least three NGOs must be involved in a project for it to be eligible for funding

- Simplified but structured application process.
- Sharing technical and thematic expertise between NGOs (capacity building)
- Individual learning and organisational learning

- Activities are not prescribed but the project must fall into one of the priority theme i.e. gender equality or health
- Must have benefits to Nordic countries
- Promote the development of civic society in Russia and/or Belarus

Sound analysis, inspiring ideas

ECORYS

Grundtvig Senior Volunteering Action

This action enables two European organisations to develop lasting cooperation by exchanging volunteers aged 50 and above.

Successful project example:

Museum in Manchester exchanging volunteers with the museum in Budapest. Volunteers from Manchester had experience in object handling and volunteers from Budapest had excellent experience in running tours programmes.

Sound analysis, inspiring ideas

ECORYS ▲

Grundtvig Senior Volunteering Action cont'd

Elements

- Enable senior citizens to volunteer in other European country as a form as informal learning activity
- Create lasting partnerships between host and sending organisations

- Volunteers aged 50 and above
- Wide range of civil society organisations focusing on small organisations acting at local level

- Each organisation receives their own grant to cover their costs as sending and hosting organisation
- Costs are covered as flat rates
- Volunteers do not receive funding directly
- Limited funding available

- Part of LLP Grundtvig action
- Administered by the LLP National Agencies
- Action is promoted through newsletters and info days by national agencies
- Project based approach

- NA run the helpline for potential applicant organisations
- Written guidelines prepared by EC and NAs
- Provisions to apply for funding to visit potential partner
- Would be beneficial to have more targeted support for small organisations on how to plan and run the projects

- Volunteer exchanges during the period of 3-8 weeks
- Duration of the project 2 years

Sound analysis, inspiring ideas

ECORYS ▲

Grundtvig Senior Volunteering Action cont'd

Experience:

➤ The aim for the action is not only to focus on exchange of volunteers but also develop cooperation and common projects between organisations.

➤ The projects are most successful when they are initiated by small local organisations working in the same field.

➤ The main risks in the projects when sending and hosting organisations do not prepare enough and volunteers become observers rather then active learners.

➤ Some more funding for developing the projects would be beneficial.

➤ Promotion of the action is very important for attracting new organisations to participate.

Sound analysis, inspiring ideas

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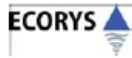
Commercial example: German automotive sector

- **Both short and long-term assignments**
  - ➤ Typically 6 months for short term or 3 years for 'permanent' positions

- **Target groups**
  - ➤ Staff with specialist skills and senior managers
  - ➤ Graduate trainees
  - ➤ Mainly European sites but global reach

- **Reactive, demand-driven**
  - ➤ To address gaps, strategic changes, expansion, projects
  - ➤ No targets or quotas

- **Mobility is a means not an end**
  - ➤ Combines business benefit and career development
  - ➤ Responsiveness, advantages of scale and access to skills
  - ➤ Group identity, individual contact, networks

Sound analysis, inspiring ideas

ECORYS ▲
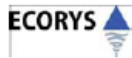
Commercial example cont'd

- **Coordinated at group HQ**
  - ➤ based on requests from local sites and offices
  - ➤ HQ assist with practicalities, admin, finance, IT
  - ➤ More support for smaller companies and new sites
  - ➤ ST costs are split, LT paid by receiving site

- **Success factors**
  - ➤ Time and support
  - ➤ Advocates/ examples at senior level
  - ➤ Managing expectations i.e. living standards
  - ➤ Dealing with regulations, tax, visas, housing
  - ➤ Cultural issues, social events for partners!
  - ➤ Site visits by HR team
  - ➤ Formal follow-up

Sound analysis, inspiring ideas

ECORYS

SW Region trades unions – UK

- Mobility Experience – with Poland – rights for migrant workers – with Germany – rights for young workers
- Function to provide information and support to trades unions in UK SW region
- Activities: exchange of experience, short placement visits, briefings, participation in events
- Timescale: over 7 year period
- Source of funding – own resources – UK side

Key elements
- EU mobility schemes complex to access especially for small funding requirements. Many different schemes each with own rules and access etc
- Eligibility criteria rigid: not allowing flexibility to reflect circumstances

Sound analysis, inspiring ideas

ECORYS

Eurada – European Association of Regional Development Agencies

Activities:
- Role to provide exchange of information and experience between members and to provide knowledge of and input into EU policies
- Mobility experience: has 125 members in Member States and candidate countries; has newsletter, e-news, website, events, informal exchanges
- Timescale: over 20 year period
- Sources of funding: subscription costs for members, members own resources (eg for travel), some participation in EU programmes, but not for core activities

Key elements:
- Small amounts of funding for pump-priming are most important
- Ensure definition of "professions" covers those working on cohesion-related activities
- Ensure mobility is aligned with the core objectives of the organisation
- Try mobility activities of innovative type (not just twinning) e.g. competitions
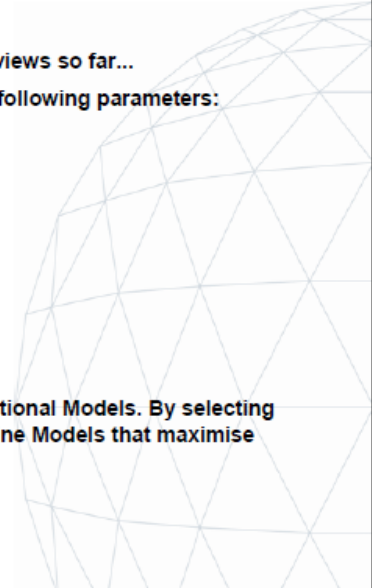
Sound analysis, inspiring ideas
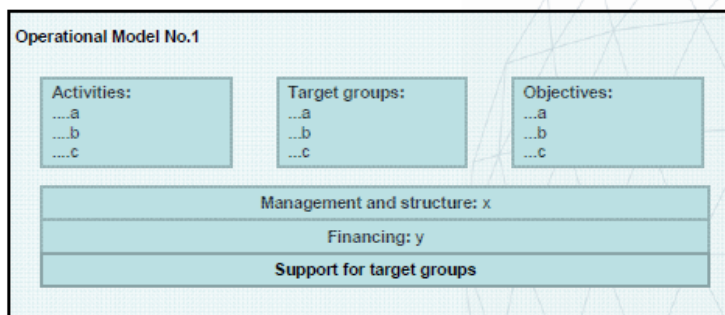
ECORYS

Elements	Parameters
➢ To build capacity ➢ Civic participation ➢ Increased participation ➢ Contribute to building EU identity	Objectives
➢ Civil Society Organisations at different levels ➢ Professionals ➢ Other Civil Society actors ➢ Harder to reach applicants	Target Group
➢ Preliminary visits ➢ Study visits ➢ Exchanges ➢ E.mobility ➢ Projects	Activities
➢ Intermediaries ➢ Centralised/decentralised, direct/indirect ➢ Recruitment ➢ System based approach/project based approach	Structure
➢ Timing of cash-flow, payments ➢ Lump sums versus variable rates ➢ Reimbursement of administrative costs (per head or aggregate) ➢ Co-funding, match funding, sponsorship (CSR) ➢ Seed funding/pump-priming, sustainability	Finance
➢ Administrative, ease of making applications ➢ Technical/thematic (expertise) ➢ Peer learning (and staff development) ➢ Individual learning/Organisational learning	Support for Target Group

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ECORYS

WHAT MIGHT THESE OPERATIONAL MODELS LOOK LIKE?

Use combinations of activities, target groups and objectives to build possible models. Fix target groups and objectives?

Operational Model No.1

Activities:
....a
....b
....c

Target groups:
...a
...b
...c

Objectives:
...a
...b
...c

Management and structure: x

Financing: y

Support for target groups

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ECORYS

Questions for discussion...

• Is the approach right?

• Have we identified the right elements and parameters?

• Have we missed anything and are there other schemes we should look at?

• Which elements are most likely to promote the kinds of mobility we are interested in?

• Can we start to construct some tentative Operational Models?

THANK YOU

Sound analysis, inspiring ideas

ECORYS
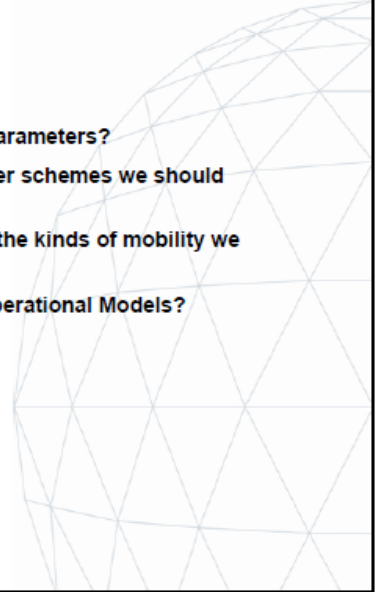
Workshop 2: Shaping the Future of EU Civil Society Mobility Schemes

Brussels 8 February 2011

Sound analysis, inspiring ideas

Annex Seven: Review of Innovative Actions

Introduction

This section presents an overview of the Innovative Actions measure (1.6) of the Europe for Citizens Programme. The aim of this analysis is to capture any lessons learned to help develop operational models to maximize civil society mobility, in particular through.

- Obtaining insights into a range of operational dimensions which are relevant to our work on operational models for maximizing civil society mobility.

- Better understanding demand from civil society organisations to take part in mobility activities.

Firstly, we outline the main characteristics of the measure including the objectives, funding available and activities supported. Secondly, we consider data regarding the applications received for the call of proposals.

The main information sources used were:

- Review of the programme documents principally the Europe for Citizens Programme Guide, Call for Proposals for Innovative Actions Projects (EACEA/15/2009);

- Review of output data and the applications submitted;

- Qualitative interviews with representatives of the funded projects; and

- Review of the responses provided by the funded and rejected applications as part of the interim evaluation of the Europe for Citizens Programme.

Background information

Innovative Actions measure (1.6) within the Europe for Citizens Programme has been launched in 2009. It is a pilot action aiming to introduce mobility activities within the programme and encourage exploring innovative approaches to mobility initiated by civil society organizations (CSOs). The general and specific objectives of the call for proposals that has been issued for the Innovative Actions measure are presented in the table below.

Table 1: Overview of the objectives of Innovative Actions measure (1.6)

Overall objective
To test and develop innovative transnational exchange schemes with a view to building long-term partnerships between civil society organisations operating in different participating countries in the area of the 'Europe for citizens' programme.
Specific objectives
➢ Develop and test new forms of transnational mobility between civil society organisations ➢ Promote the concept of transnational mentoring between civil society organisations to support innovative project methodologies in relation to transnational mobility and

mentoring between civil society organisations	
Thematic priorities	
➢ Future of the European Union and its basic values ➢ Active European citizenship: participation and democracy in Europe ➢ Intercultural dialogue ➢ People's well-being in Europe: employment, social cohesion and sustainable development ➢ Impact of EU policies in societies.	

Source: European Commission, Europe for Citizens Programme, CALL FOR PROPOSALS — EACEA/15/2009

The overall budget of €1.1 million was made available to the projects funded by Innovative Actions measure in 2009. The call for proposals has been launched in 2009 in order to select the projects that would be implemented in the framework of this measure. The size of the individual projects was between €75,000 and €150,000.

The activities supported had to be in line to the specific objectives of the call for proposals (EACEA/15/2009) and include mobility of the members of staff, board members and volunteers of the partner organisations applying for funding. More specifically the call for proposals identified the following activities[81]:

- mentoring on a one-to-one basis
- the mentoring of groups of staff/volunteers
- exchanges of staff between the partner organisations.

Moreover, the call identifies that projects should develop and apply innovative methodologies to mentoring and international exchanges for example combining the face-to-face and online activities. The projects could be maximum of 12 months long and they should start between 1st January and 31st March of 2010.

Overview of output data

Overall, 104 applications were received from civil society organisations for this measure. The overall grant requested was for over €11 million. Nine projects were selected for funding following the assessment process, 17 applications were deemed ineligible and the remaining 78 applications were not retained for funding.

An overview of the representation of countries among the lead partners of the submitted applications is presented in the figure below.

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[81] European Commission (2009)*, Europe for Citizens Programme, CALL FOR PROPOSALS — EACEA/15/200. Available at: http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2009:176:0012:0015:EN:PDF

Figure 1: Country coverage of lead partners for projects submitted for funding for Innovative Actions (1.6)

Innovative Actions (1.6) Country Coverage of Lead Partners
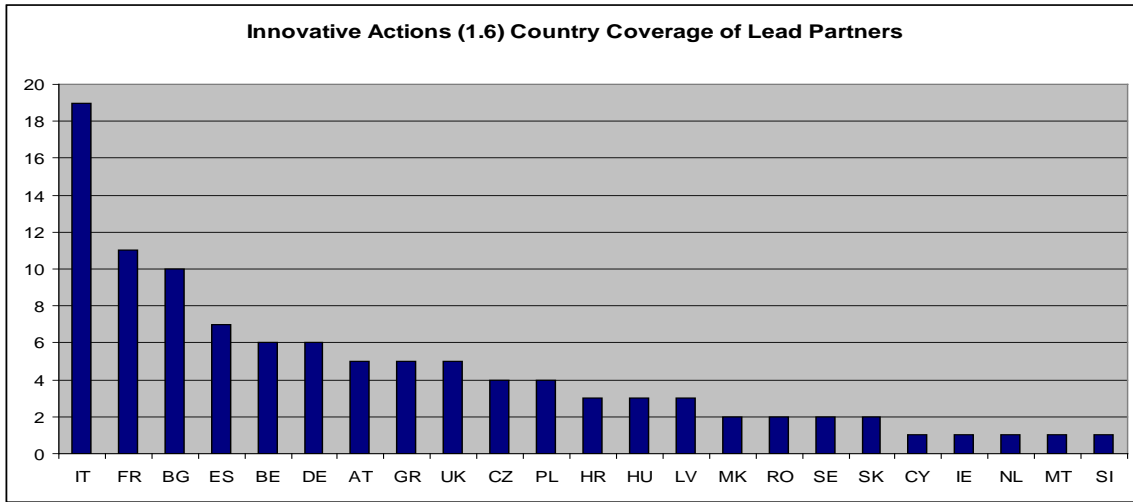
This shows that most of the lead organizations were based in Italy, France and Bulgaria. The other larger and older Member States are also better represented among the lead partners with the exception of Bulgaria. Some of the eligible countries are not featured among the applicant organisations, such as Albania, Denmark, Estonia, Finland, Lithuania, Luxembourg and Portugal and are the least represented among the lead partners.

An overview of the country coverage of the partner organisations is presented in the figure below.

Figure 2: Country coverage of partners for projects submitted for funding for Innovative Actions (1.6)

Innovative Actions (1.6) Country Coverage of Partners
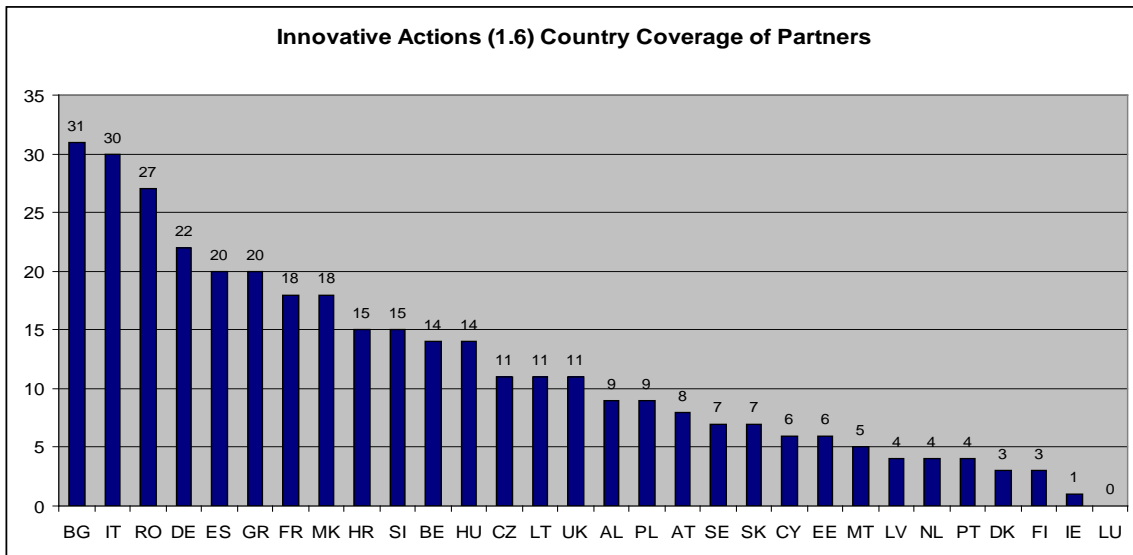
Overall, some 353 partner organisations were included in the applications, representing most of the Member States and candidate countries eligible for the Innovative Actions measure. The

figure shows that Bulgaria, Italy and Romania are best represented among the partner organizations. The candidate countries are comparatively well represented among the partners with 18 partner organisations from FYROM, 15 from Croatia and 9 from Albania are among the partner organisations. The least represented country among the applicants is Luxembourg with no organisations applying as applicants or partners. In addition, Denmark, Finland and Ireland are also least represented among the partner organisations.

The overview of the priorities, horizontal features, themes related to equal opportunities is presented in the figures below.

Figure 3: Overview of the permanent priorities addressed in the eligible applications
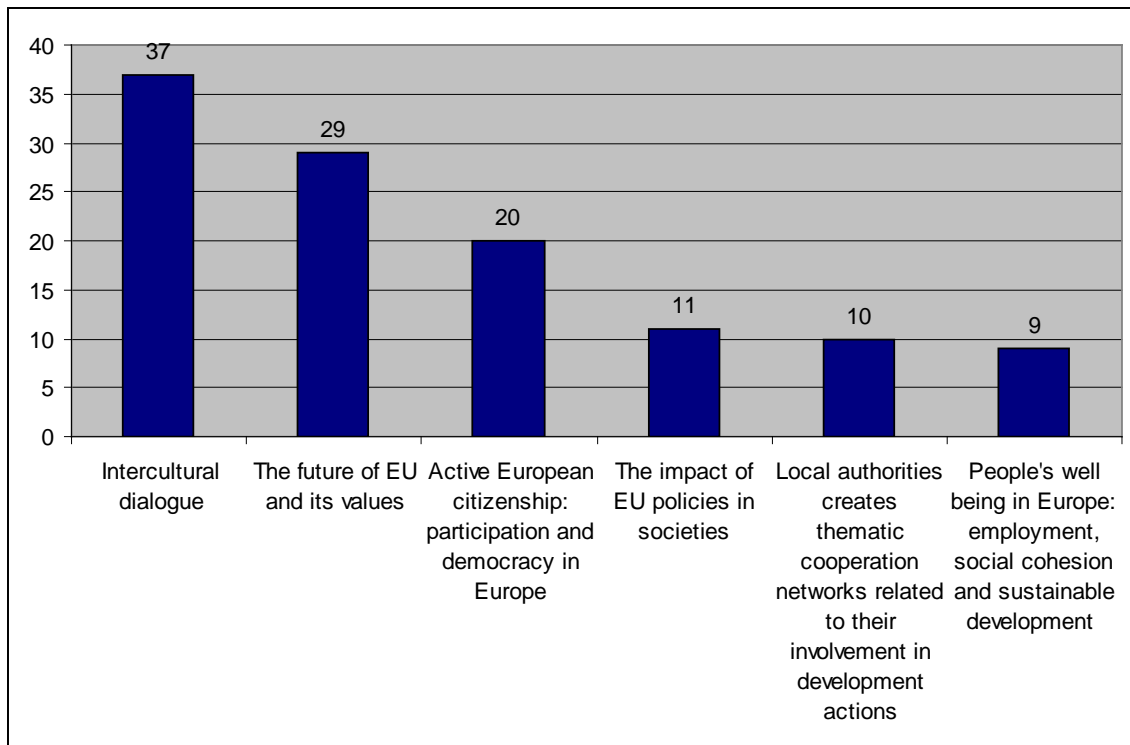
'Intercultural dialogue' was the most widely permanent priority addressed by applications for the Innovative Actions measure. 'The future of the EU and its values' was also addressed by a relatively high number of applicants. However, 'the people's well being in Europe' was addressed least in the eligible applications.

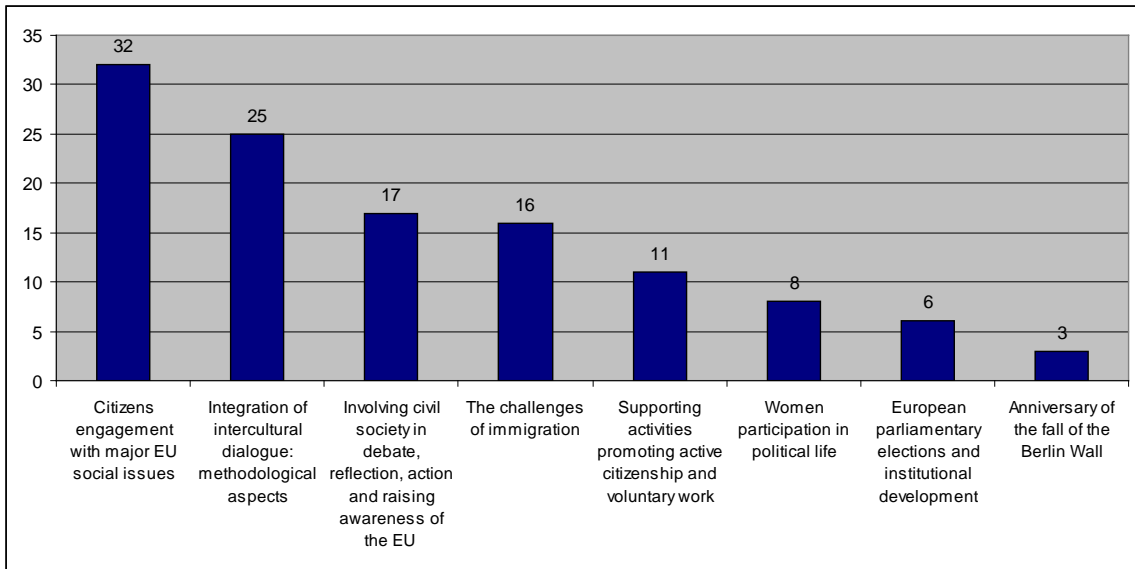**Figure 4: Overview of annual priorities addressed in the eligible applications**

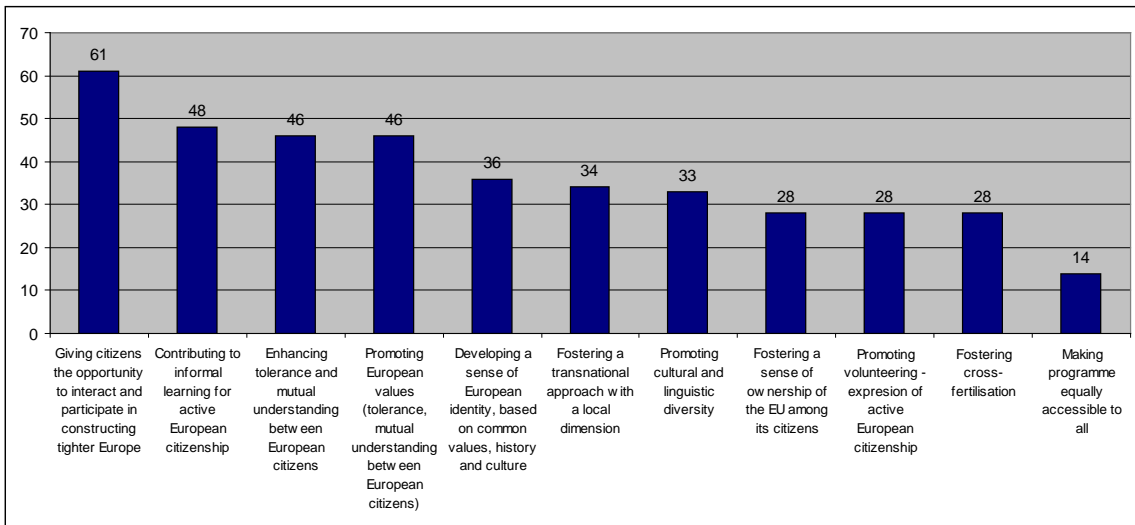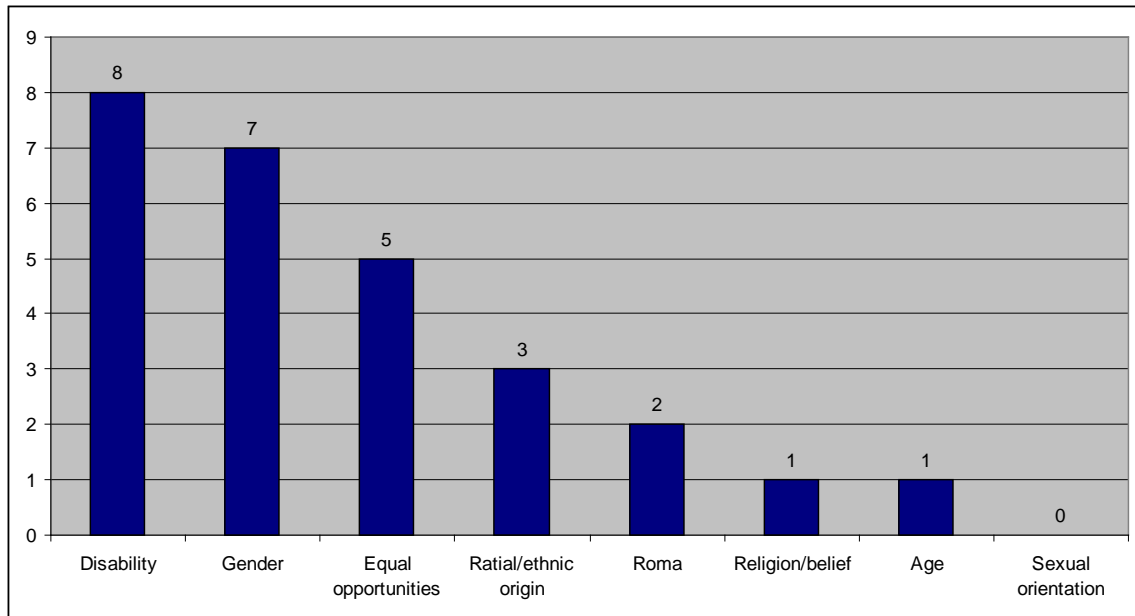**Figure 5: Overview of horizontal features in eligible applications**

Figure 6: Overview of themes related to equal opportunities covered within eligible applications

The high number of the applications and the organisations involved in the projects shows that there is a high demand among CSOs in Europe to take part in mobility-related activities and which are willing to explore innovative methods of transnational exchanges that contribute to the objectives of the Europe for Citizens programme. Moreover, the majority of the eligible applications contributed to the horizontal theme 'giving citizens the opportunity to interact and participate in constructing tighter Europe'. This indicates that there is a demand for activities that facilitate interaction between CSOs in Europe.

A wide range of organisations applied for support through Innovative Actions, including Europe-wide and national umbrella organisations active in different fields such as citizens' support, culture, community media, education, migration, equal opportunities, sustainable development, young people, social inclusion and social cohesion. Trade Union representatives also applied for the funding to implement mobility projects among their organisations.

An overview of the output data in relation to the successful projects is presented in the table below.

Table 2: Overview of the successful applications

Title	Applicant	Partners	No. of participants	Total Budget (€)
Unity through mobility: A stronger EMI network for a stronger Europe	European Movement International (BE)	National Councils of EMI in BE, FR, DE, AL, EE, BG, SI, FI, DK, GR, IT, IE	6425	121,413.00
Flowchart	European Citizens Action Service (BE)	Nat. ass. of citizens advice bureaux - RO, UK, PL; South Tyrone Empowerment Programme (UK), FOCUS (IT), ACCEM (ES)	22	146,448.00
Building Active Citizenship in Europe: an experience in mentoring	Cittadinanzattiva ONLUS/Active Citizenship Network (IT)	INDEX (BG), CCCD (DE), CRPRC (MK), PIC (SI), Association of Polish consumers (PL), Rutland CAB (UK), the World of NGOs (AT)	18	188,575.00
EuWoRa - European Women's Radio. Mentoring Programme in Collaborative Research Methodology	Verein zur Förderung und Unterstützung von Freien Lokalen (AT)	A.R.A. radio gazelle (FR), Radio vallekas (ES)	16	155,766.00
Circles of European integration	ZAVOD ZA NOVODOBNO IZOBRAZEVANJE (SI)	CNVOS (SI), FCVRE (ES), CCI Vrastsa (BG), D.C.T. (GR)	34	176,680.00
European Mobility Enabling to Reduce the Ground of Exclusion	ISTITUTO LUIGI STURZO (IT)	Second chance association (BG), FCASEC (RO)	86	141,800.00
Erasmus syndical	Confédération Européenne des Syndicats (BE)	TUC of Metalurgists (BE)	18	187,660.00
Mobility for Democracy in Europe	Association of Local Democracy Agencies (FR)	NGO Horizont (AL), National Forum Alternatives, Practice, Initiatives (BG); Local Democracy Agency Sisak (HR), Active Creative and Reforming Org (GR) K.M.O.P. (GR), Identita e Dialogo (IT)	558	146,015.00

Participation for Change	National Council for Voluntary Organisations (UK)	National federation of Polish NGOs (PL), Network of Estonian NGOs (EE), BBE (DE), Centre for Info, Service, Cooperation and Development of NGOs (SI)	250	187,199.00

The table above shows that the number of participants included in the projects ranges from 16 to over 6,000. However, review of the application forms and the final report shows that the project *Unity through mobility: A stronger EMI network for a stronger Europe* does not include direct beneficiaries but potential target audience for the dissemination of the project results. The final report identified that the project reached 830 participants in total and therefore it was considerably lower than foreseen in the original application. Therefore, the projects reached relatively low numbers of participants. Nevertheless, the demand for mobility activities was very high. This points to a need to revise the way opportunities for mobility are included in the Europe for Citizens programme in order to increase the reach of the action to better respond to the demand through incorporating the lessons learned from the pilot projects funded through the Innovative Actions measure.

A more detailed overview of the projects and their activities is presented in the table below.

Title	Lead organisation	Objectives/project description	Activities	Mobility
Unity through mobility: A stronger EMI network for a stronger Europe	European Movement International (BE)	The project aims to set up a mentoring system between EMI National Councils (NCs) while promoting mobility, the use of new information technologies and greater outreach to citizens. As within the network some National Councils are stronger and more active than others, a few of the more developed Councils will play the role of mentor for one or more "less developed" Councils -"partner Councils". NCs will send a paper describing their structure and activities. On that basis, the EMI will determine which councils should work together. Mentors will work with their partner Councils to develop a strategic development plan for each of them, and share best practices and give advice on ways to recruit new members, organise events and raise funds. The mentors and the EMI will also help the partner Councils to establish key political contacts in Brussels and in their own countries. Board members and/or Vice Presidents of the EMI will travel to the member countries to promote the local Council and open doors for new projects and funding opportunities. Each partner Council will organise an event in its country on a subject relevant to DG EAC objective, linked to the interests of the country. This will be the opportunity to recruit new members, make contacts with	• Gathering reports defining National Councils structures • Initial conference • EMI will provide training in Brussels on new information technologies and EC calls for proposals, and will help each Council to set up its own website, hosted on a common server. • Meeting with mentors • Political meetings and national events • Reporting • Final conference.	Type of mobility related activities: Short term meetings aiming to increase the profile of the "less developed" NC Target group: Board members, Leaders of National Councils

		potential sponsors and raise awareness of the project among the general public and local authorities.		
Flowchart	European Citizens Action Service (BE)	The project aims at initiating and developing an exchange programme among civil society organizations providing information and advice to European citizens about their free movement rights. The programme will encourage transnational mobility between the staff and volunteers of citizens advice and information services in order to address the free movement challenges within the EU and the societal impact of the EU policies related to migration. All activities foreseen in the exchange programme will have a strong cultural and social focus in the sense that they would help individual advisors, both staff and volunteers, know more about where their "clients" come from or where they are going to, hence a strong general intercultural element. Skills and knowledge transfer among organizations would naturally lead to improved, more multi-lingual services to European migrants (information systems, feedback mechanisms, mutual learning on common themes for advice etc.). Distinct benefits should flow from the programme for participants, partners organisations, their networks and end-users.	• Kick off meeting and pr management related activities • Preparation for mentoring • 10 days work placement • Networking and web-based mentoring based on using blog diaries • Report "Who's afraid of free movement of people within the EU" drawing facts, conclusions and recommendations for future work. • Study visit to Brussels and Luxembourg including meeting MEPs • Final conference	Type of mobility related activities: Short-term placements; Study visit Target group: Staff, Volunteers
Building Active Citizenship in Europe: an experience in	Cittadinanzattiva ONLUS/Active Citizenship Network (IT)	The project specifically aims to: a) develop and test new forms of transnational mobility between the partner organizations of EU Network ACN. b) experiment diverse innovative form of transnational	• Preliminary study • Kick off meeting • Peer to peer leadership meeting (2 weeks to learn more about	Type of mobility related activities: Preparatory visits; Medium-term (one month) staff exchanges

| mentoring | | peer to peer mentoring between partner organisations of the Network regarding different policy areas (civic participation, patients rights, CSR and consumer rights) as well as work methodologies.
c) create an innovative methodology and curriculum in relation to transnational mobility and mentoring between partner organizations that can be used after for the future development and sustainability of the Network and its organizations.

In this project ACN will bring together 8 organizations from its Network; 4 strong, more experienced organizations from Austria, Germany, Italy and the UK together with 4 younger and organizations from Eastern Europe countries of Bulgaria, Macedonia, Poland and Slovenia. The organizations will develop three innovative types of mentoring activities: Peer to Peer Leadership mentoring, Mentoring partnerships between the organizations and E-mentoring. To develop the methodology, content and operational plan for the mentoring activities there will a Partner Kick Off meeting and a final Evaluation meeting to bring together lessons learned over the course of the project and finalize a transnational mentoring toolkit and work plan. | participant organisations to identify what they could offer each other)
• Mentoring partnerships for one month 4 organisations send and 4 organisations receive participants
• E-mentoring
• Evaluation meeting | Target group: Leaders of member organisations, Staff |
| EuWoRa - European Women's Radio. Mentoring Programme in Collaborative Research Methodology | Verein zur Förderung und Unterstützung von Freien Lokalen (AT) | The aim of the project is the exploration of European female radio history as a part of the European grassroots media tradition and the empowerment of female community radio journalists. This is done via a workshop and mentoring programme that brings together women actively involved in radio production and trainers in social research and media pedagogy. The radio volunteers get to know methods of collaborative research and are supported in the process of researching and documenting | • 3 workshops (5 days each and last one 7 days)
• Audio tutorials for preparation in the workshop
• Management of the project
• Final report | Type of mobility related activities: Participation in the workshops

Target group: Women involved in radio production, Trainers in social research and media pedagogy |

		their own radio station's history of female radio activism in a team. The international exchange throughout the project will be empowering; it will foster networking, discussion of research ethics, the collective development and management of research strategies and theorizing of European women's radio history as an international history. A final publication will give the opportunity to deal with questions of dissemination and media pedagogy.		

Circles of European integration	ZAVOD ZA NOVODOBNO IZOBRAZEVANJ E (SI)	The project is encouraging the cooperation between different types of civil society organisations, from different EU countries, working under EU programmes for active citizenship, learning mobility, employment, voluntary work and/or EU integration.
		
		Main objectives of the project are:
		    development of long-term partnership between partner organisation for future co-operation under different EU programmes;
		    exchange of knowledge, good practice, experiences, methodologies of work between different civil society organisations;
		    promotion of EU values like: respect to diversity, solidarity, tolerance, open-mind, flexibility, creativity;
		    encouraging active citizenship through volunteer work in international environment;
		    raising the number, quality and participation of different target groups in EU learning mobility which effects the awareness about European identity and it's advantages for citizens;
		    activation, inclusion and engagement of EU citizens
		    promotion of community spirit on EU and global level
		    learning about different cultures, nationalities, languages, political system, economy, history, society among different countries;
		    creating synergy among citizens, organisations and countries
			• Preparation phase
			• Work-shops for mentors
			• Exchange of employees and volunteers; including monitoring
			• Implementation of new experiences in home organisation
			• Evaluation (mentors, carriers and participants)
			• Dissemination and exploitation
				Type of mobility related activities: Participation in the workshops, short-term and medium-term (one month) staff exchanges
				
				Target group: employees in partner organisation, volunteers in partner organisation, volunteers in other local organisation

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		realising new ideas for changes, new connections and new discoveries for EU integration on higher level development of human capital on personal and professional level/raising employability of participants.		
European Mobility Enabling to Reduce the Ground of Exclusion	ISTITUTO LUIGI STURZO (IT)	EMERGE aims to test and promote innovative methodologies for transnational mobility and for mentoring processes between Italian, Bulgarian and Romanian NGOs. The EMERGE core is the mobility of researchers among the 3 organisations, combined with the capacity of each organisation to establish a national network of associations representing disadvantaged groups. Activities include an initial phase of recollection and analysis of materials related to each European election campaign the partners have hosted (2009 for Bulgaria and Romania, 1979-2009 for Italy) and the documents related to the consequent legislative activity in the European Parliament in the field of poverty and social exclusion. The partners will develop on-site (with a 2 weeks intensive training session in Rome) and on-line activities of exchange of knowledge and practices, aimed at producing monthly news on the EP work on themes of poverty and exclusion, to be distributed to the citizens, together with the defining of Guidelines for the EU political parties. This will be the basis for a shared model of: understanding of the political platforms concerning poverty and social exclusion expressed in the occasion of the 2009 EU elections; controlling the legislative activity of the EP in the project period; elaborating the data and information to produce tools for the civil society and the EU institutions for activating the European citizenship and combating poverty and exclusion.	• Project management • Research and study • Establishing links with the national NGOs (10) and schools (5) in each country • Intensive training session in Italy • Follow up meeting with NGOs and schools • Dissemination of project results	Type of mobility related activities: Participation in the training Target group: Researchers/staff, members of partner organisations

Erasmus syndical	Confédération Européenne des Syndicats (BE)	Trade Unions face the need to work within the international environment and develop their European strategies in their day-to-day activities. Therefore it is important that staff members at all levels would have an understading of variety of socio-economic conditions in Europe and different contexts within which the Trade Unions are operating in different Member States. This project addresses this need through proposing to provide the opportunity of staff exchanges for Trade Union employees lasting 1 month. The mentor is assigned to each employee visiting the organisation.	• Opening seminar • Traineeships • Final conference	Type of mobility related activities: Work placements/ traineeships Target group: Employees of the Trade Unions

Mobility for Democracy in Europe	Association of Local Democracy Agencies (FR)	The project is designed to encourage a constant engagement of the civil society in exchanges preventing democracy of falling into possible gaps. ALDA approaches the present call through one of the EU's fundamental value: mobility. MoDE will encourage mentoring activities between NGOs but also between NGOs and volunteers hoping to deepen mobility experiences and to establish a long-lasting transnational cooperation.
		
		MoDE's aims are:
		   • giving NGOs the opportunity to interact and work together in a equal partnership
		   • encourage the flow of capacities and knowledge in Europe
		   • enhance tolerance and understanding of different cultures
		   • promoting volunteering
		   • support local based NGOs in accession countries
		   • use and encourage transnational mentoring
		   • familiarize NGO delegates with informatics methods
			• Launching project - mobility support meeting (debate on nowadays challenges and needs in terms of democracy; it is to discuss a functioning methodology for transnational mobility)
			• Transnational mentoring sessions 7 sessions 2 days each - present the structure, exchange good practice, encouraging ICD
			• Local meetings during transnational mentoring sessions (wider groups of stakeholders)
			• Working groups on volunteering themes (7 one day seminars)
			• 2 week exchanges
				Type of mobility related activities: Workshops, Meetings, 2-week exchanges, Online support for volunteers
				
				Target group: Staff members of partner organisations, Volunteers

		• build up a sense of common responsibility in building Europe together The partnership, built with seven partners from six countries (2 accession ones), is planned to strengthen relations between European NGOs, help break down barriers between people and groups, promote the learning of other cultures but also support the multiplication of NGOs and NGO networks.	between staff of the NGOs and volunteers (14 part total) • online mentoring for volunteers (7 online sessions), • Dissemination of the project related information	
Participation for Change	National Council for Voluntary Organisations (UK)	P4C will use innovative meeting formats and e-mentoring to develop exchange between CSOs across Europe, facilitated and supported by 5 National Associates for CSOs (the partners) in the UK, Poland, Slovenia, Germany and Estonia. It will establish a sustainable, transnational framework for sharing knowledge and a flexible mechanism though which European CSOs can find solutions to the challenges they face. Themes identified include Information and Communication Technology, Advocacy and Membership development. Staff, trustees, volunteers from up to 250 CSOs in the 5 partner countries will be invited to take part in an E-CONFERENCE, hosted on a dedicated online platform. Opportunities to provide and to receive mentoring will be promoted before, during and after the event, with participants directed to online registration and criteria, on NCVO's Online Communities platform. Post event, partners will assess mentoring applications, create a shortlist of 5 mentors (1 per partner country) and match them to 5 beneficiaries in another partner country. Mentors and beneficiaries will be invited to attend an on-site mentoring set-up event, facilitated by the partners,	• E-conference • Partner training • On site mentoring set up event • E-mentoring • On site mentoring debriefing event • MEP seminar	Type of mobility related activities: Training, E-mentoring Target group: Staff, Trustees, Volunteers

| | | who will be trained in event facilitation techniques. Participants will be trained on NCVO's Online Communities platform the focus for the mentoring.

Mentors and beneficiaries will use an E-MENTORING framework to make first contact and agree next steps. Participants will document involvement through a pro-forma provided at the set-up event. Support will be given to mentors by Partners, again via the Online Communities platform.

Participants will be invited to attend an ON-SITE MENTORING DEBREIFING at which mentoring case studies will be presented and learning shared with participants.

Case studies and learning will be communicated via partner networks. Target audiences include civil society organisations in all member states, national government, MEPs etc. Full project evaluation will follow. | | |

Regarding mobility-related activities under Innovative Actions, most of the demand among applicant organisations included activities that support capacity building and good practice exchanges, through short-term mobility activities such as study visits, meetings, workshops and trainings supported by the online based exchanges. Two of the projects introduced longer term work placements lasting around one month and providing the opportunity for staff members of the organisations involved to gain substantial experience of working abroad.

The review of the applications from successful and rejected projects shows that the innovation dimension within this measure is understood as including a mix of well-established opportunities for exchanges between partner organisations such as face-to-face meetings including workshops, trainings, conferences, study visits and work placements as well as using online tools for the exchanges and communication. Some of the projects included research related activities as well. Overall, the scope and quality of 'innovation' appears limited.

Understanding of 'mentoring' and what specifically was expected in relation to the mentoring activities is unclear. For example, the projects supported included a wide range of activities including support for the development of organisations at national level, work placements followed by online communication and exchanges, sharing of good practice, series of workshops, trainings and meetings.

The findings of this review may be summarised as follows:

- Demand for IA project funding shows that there is high demand from CSOs to engage in transnational mobility activities.

- Activities implemented through IA projects are linked mainly to the development of the beneficiary organisations and their networks, through short-term mobility related activities. We note that similar activities (such as seminars, thematic workshops, training seminars, the production and dissemination of publications, information campaigns, artistic workshops, amateur sporting events, exhibitions, grassroots initiatives) are also supported by measure 2.3 of the Europe for Citizens programme: *Support for Projects Initiated by Civil Society Organisations.*

- Importantly, most of the organisations and activities implemented are eligible to apply for the operational grants provided by the Europe for Citizens programme, which cover a number of the short-term mobility opportunities similar to those that have been undertaken within the framework of the Innovative Actions measure.

- Three of the projects provided medium/longer term mobility opportunities to members of staff working in partner CSOs (ETUC, the Active Citizenship Network, and Circles of European Integration). These opportunities are not provided in any of the other measures of the Europe for Citizens programme and therefore are of significant importance for this study, insofar as they provide an example of the type of mobility activity that has potential to maximise impact and might be considered for scaling up via any new mobility measure.

- Most of the IA project activity included the analysis of opportunities and barriers for transnational mobility. The experience gathered through these projects could be used as source material for CSOs that would actually undertake the placements (the material could be included in the website dedicated to the new measure and partner search tool for example).

- The number of the participants in mobility activities is relatively low and therefore does not correspond to the cost-effectiveness criteria.

- Many projects include their member organisations among the partners of the project. This undoubtedly helps to develop the network itself, but is likely to have less impact on building long-term cooperation, since because they are already members of the same network; organisations are already likely to have certain level of cooperation. This raises the possibility of deadweight effects, where funding is allocated inefficiently as a result of limited additionality (activities may have happened anyway, even without the subsidy)

- Online-based communication tools support implementation of the IA projects and should be further used in providing mobility opportunities. However, online based communication supports but does not replace face-to-face exchanges.

Annex Eight: Interviewees

	Contacts (Mobility Models)	Organisation
1	Ane Kofod Petersen	Nordic Council of Ministers, DK
2	Janne de Jong	Nordic Council of Ministers, DK
3	Marianne Neraal	Nordic Council of Ministers, DK
4	Fredric Larsson	Nordic Council of Ministers, NGO Programme, DK
5	Madis Kanarbik	Programme Coordinator, Management Body of the Nordic-Baltic Mobility Programme for Public Administration, ET
6	Kārlis Valters	Adviser, Nordic-Baltic Mobility and Network Programme for Business and Industry, LT
7	Madeline Rose	Head of Grundtvig, Grundtvig UK National Agency, UK
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