

**UNIVERZA V LJUBLJANI  
EKONOMSKA FAKULTETA**

**DIPLOMSKO DELO**

**MANAGEMENT EVROPSKIH PROJEKTOV – PRIJAVA  
NA RAZPIS**

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## **IZJAVA**

Študent Jernej Hribar izjavljam, da sem avtor tega diplomskega dela, ki sem ga napisal pod mentorstvom dr. Aleša Vahčiča, in dovolim objavo diplomskega dela na fakultetnih spletnih straneh.

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Podpis: \_\_\_\_\_

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## 1 UVOD

»Želje oziroma sanje o združeni Evropi segajo že v 19. stoletje. Veliki pisec in humanist Viktor Hugo je že v tistem času pisal in sanjal o "Združenih državah Evrope". Dejanska realnost o možnostih oblikovanja takšne države pa se je kazala v dveh strašnih vojnah, ki sta se odvijali v prvi polovici 20. stoletja« (Filipič, 2006, 3/1, str. 1).

Evropa je bila po 2. svetovni vojni razklana na dva dela in sicer na tako imenovani Vzhodni blok, katerega so sestavljale države Vzhodne Evrope na čelu s tedanjo veliko zmagovalko Sovjetsko zvezo in socialistično družbeno ureditvijo (v ta blok je spadala tudi naša takratna domovina Jugoslavija) in na Zahodni blok, katerega jedro so sestavljale Združene države Amerike, Velika Britanija, Francija in Zahodna Nemčija, ki so vpeljale kapitalistični družbeni sistem. Kljub ohlajenim odnosom med obema taboroma in nenehnem strahu pred izbruhom 3. svetovne vojne je bilo v medijih moč zaslediti nekakšne poskuse sodelovanja, ki pa so se največkrat izkazali le za lažno propagando. V začetku devetdesetih let prejšnjega stoletja, po razpadu velikih, tudi umetno in deloma pod prisilo tvorjenih držav, se je šele pokazala želja po povezovanju Evrope v neko celovitost in enotnost. Takrat pa so se pokazali vsi problemi in huda kriza, ki jo je povzročila socialistična družbena ureditev v državah nekdanjega Vzhodnega bloka. Razkorak med tehnologijo, razvojem, standardom in nenazadnje celotnim življenjem se je pokazal kot skorajda nepremostljiv.

Tedanja Evropska skupnost je zato leta 1988 podpisala trgovinski in gospodarski sporazum o sodelovanju z Madžarsko in s tem se je pričel proces pridruževanja tranzicijskih držav Evropski skupnosti. V pomoč temu je bil leto kasneje oblikovan tudi program Phare, ki je bil osnovan kot pomoč predpristopnim državam pri vzpostavitvi tržnega gospodarstva in spodbujanja demokracije. V skoraj dvajsetih letih, odkar je bil ustanovljen program Phare, je le-ta doživel kar nekaj sprememb, tako po svoji vsebini, kakor tudi po državah upravičenkah (prejemnicah) iz tega programa (Rožič, 2002, str. 1).

»Evropska unija ne predstavlja samo naše nove, skupne države, ampak tudi široke možnosti pri poslovanju tako malih, srednjih ali velikih podjetij. Nenazadnje pa Evropska unija predstavlja tudi možnost pridobivanja finančnih sredstev, s pomočjo katerih lahko tako institucije, podjetja ali kmetje izboljšajo obstoječi način poslovanja, vlagajo v razvoj ali izgradijo potrebno infrastrukturo« (Filipič, 2006, 1/1, str. 1).

V tem diplomskem delu bo predstavljen Management<sup>1</sup> evropskih projektov, kar bo nadgrajeno in obogateno s prijavo na dejanski razpis, ki je bil objavljen lani v okviru programa Phare. V nadaljevanju obravnavani razpis je bil izbran zaradi dveh značilnosti. Prva je predvsem tehnična in sicer je to njegova nezahtevnost glede števila projektnih partnerjev in števila različnih evropskih držav vključenih v sam projekt, kar pa seveda ne pomeni (kot bo razvidno v nadaljevanju), da je takšen projekt z lahkoto managerirati. Manjše število

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<sup>1</sup> O pojmu Management bo več napisanega na 8. strani, v točki 3.2.

partnerjev pomeni krajšo prijavo in ker smo pri pisanju diplomskega dela omejeni s številom strani, je takšen projekt primernejši. Drugi razlog pa je bolj vsebinski. V obdobju pred polnopravnim članstvom v Evropski uniji, je bila tudi Slovenija upravičenka do sredstev iz tega programa, sedaj pa lahko v tem programu sodeluje le še kot podizvajalec projektne partnerja. Ker pa je obravnavana tema razpisa (Pomoč Hrvaški pri usklajevanju nekaterih sistemov z evropskimi – neformalno izobraževanje) zelo zanimiva in je bila še pred nedavnim aktualna tudi pri nas, je bila izbrana za predstavitev.

Managementa evropskih projektov pa ne moremo spoznavati brez predhodnega poznavanja Evropske unije. Zaradi obsežnosti njene zgodovine in pogostosti omenjanja te teme, bo predstavitev Evropske unije omejena zgolj na njene najpomembnejše mejnike.

Z manageriranjem evropskih projektov se misli predvsem na administrativno, finančno in strokovno plat vodenja projekta<sup>2</sup>. Mnogo podjetij se je že odločilo sodelovati na različnih razpisih za nepovratna sredstva iz Evropske unije, vendar je uspelo le malokaterim, saj dobra zamisel in izpolnjevanje pogojev razpisa še ne pomenita uspeha. Le-ta je splet prej omenjenih dejavnikov ter velikokrat nevidne, vendar ključne komponente vsakega uspešnega projekta – managementa projekta.

Management projekta bo predstavljen preko iskanja ustreznega razpisa, natančnega pregleda objavljene literature – t.i. Navodil in Programa dela (Guideliness in Work programme), pisanja projektnega osnutka, vzpostavitve projektne partnerstva, oblikovanja logične matrice, postavitve t.i. delovnih paketov (Work package), izračuna ter oblikovanja finančnega plana za obravnavani projekt ter nenazadnje izpolnjevanja razpisne dokumentacije.

V tem delu je treba opozoriti tudi na dejstvo, da je diplomsko delo napisano v dveh jezikih in sicer slovenskem ter angleškem. Razlog je v tem, da je treba vse evropske projekte napisati v uradnem jeziku Evropske unije. V kolikor se za pisanje ne izbere angleškega jezika, je treba za ocenjevalce priskrbeti prevod v angleščino, kar pa vso zadevo le oteži. Vsi priznani projektne managerji prakticirajo pisanje projektov v angleškem jeziku, saj obstajajo določene fraze, ki pri prevodu izgubijo svoj pomen, so pa nujne za uspeh projekta. Tako je tudi v tem diplomskem delu del, kjer je obravnavana prijava na razpis, napisan v angleškem jeziku.

## **2 EVROPSKA UNIJA (EU)**

O zgodovini in nastajanju EU je bilo do sedaj napisanega že zelo veliko. Zaradi tega bo nadaljevanje omejeno na njene najpomembnejše trenutke tako pri ustanavljanju, njenih širitvah in sprejemanju pomembnih aktov, pogodb in sporazumov.

Današnja EU sestoji iz sedemindvajsetih držav, ki so si po statusu enakopravne, vendar zaradi svoje razvitosti in časovne prisotnosti v EU predstavljajo različne stopnje vključenosti v njene

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<sup>2</sup> O vseh treh tipih manageriranja projekta bo napisanega več na str. 9, točka 3.3.

sporazume in sisteme. Tako na primer ne uporabljajo vse države članice EU evropske valute Evro (Slovenija je po dveh letih in pol članstva v EU lahko pričela uporabljati Evro kot trinajsta država v EU) in niso vse vključene v Schengenski sporazum (ukinitev notranjih meja). EU je tako rezultat več kot pol stoletja trajajočega procesa, ki je oblikoval poleg že zgoraj omenjene skupne valute Evro še skupni trg, ki omogoča svoboden pretok blaga, storitev, kapitala in nenazadnje tudi ljudi.

## **2.1 Glavni mejniki v razvoju Evropske unije<sup>3</sup>**

### **2.1.1 Evropska skupnost za premog in jeklo (1951)**

- Predstavlja prvi korak k integraciji.
- Cilj pogodbe je bil približevanje med Francijo in Zvezno republiko Nemčijo na področju premogovniške in jeklarske industrije. S podpisom te pogodbe se je izoblikoval skupni organ odločanja (Visoka oblast).
- K navedeni pogodbi so pristopile naslednje države: Francija, Zvezna republika Nemčija, Belgija, Italija, Nizozemska in Luksemburg.
- Pogodba je bila sklenjena za 50 let in je prenehala veljati leta 2002.

### **2.1.2 Evropska gospodarska skupnost - Rimska pogodba (1957)**

- Na podlagi Rimske pogodbe so bile ustanovljene institucije in organi za uresničevanje skupnih interesov držav članic.
- Glavni cilji Rimske pogodbe so:
  - Oblikovanje enotnega evropskega trga;
  - Prilagajanje gospodarskih politik držav članic;
  - Povečanje standarda in gospodarske stabilnosti;
  - Vzpodbujanje sodelovanja med državami članicami;
  - Spodbujanje skladnega razvoja.

### **2.1.3 Evropska skupnost za jedrsko energijo (1957)**

- Države podpisnice so se zavedale pomena tesnega sodelovanja in nadzora uporabe jedrske energije.
- Podpisnice so sprejele zavezo o uporabi jedrske energije izključno v civilne namene in potrdile potrebo po oblikovanju mednarodne nadzorne organizacije.

### **2.1.4 Pogodba o združitvi (1965)**

- S podpisom pogodbe so se združili organi odločanja Evropske skupnosti za premogovništvo in jeklo (ESPJ), Evropske skupnosti za jedrsko energijo (EURATOM) in Evropske gospodarske skupnosti (EGS).
- Ustanovljeni so bili:
  - Evropska komisija;

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<sup>3</sup> Točka 2.1 je povzeta po: Filipič, 2006, 3/1, str. 2-7.

- Svet evropskih skupnosti (sedaj Svet evropske unije);
- Skupščina (sedaj Evropski parlament);
- Sodišče evropskih skupnosti.

### **2.1.5 Carinska unija (1968)**

- Predstavlja prvi korak pri vzpostavitvi notranjega trga.
- Odpravljene so bile carine pri medsebojnem trgovanju.
- Oblikovane so bile enotne carinske tarife pri trgovanju s tretjimi državami.

### **2.1.6 Prva širitev (1973)**

- Evropski uniji se pridružijo Velika Britanija, Irska in Danska.

### **2.1.7 Evropski monetarni sistem (1979)**

- Zaradi gospodarskih kriz se je 9 članic Evropskih skupnosti odločilo vzpostaviti Evropski monetarni sistem.
- Cilj vzpostavitve monetarnega sistema je bila stabilizacija menjalniških tečajev valut držav članic.
- Sočasno z vzpostavitvijo monetarnega sistema je bila uvedena Evropska valutna enota (ECU).

### **2.1.8 Širitev (1981)**

- Devetim državam se je pridružila Grčija.

### **2.1.9 Schengenski sporazum (1985)**

- Sporazum so podpisale: Francija, Belgija, Luksemburg, Nizozemska in Zvezna republika Nemčija.
- Podpis pogodbe predstavlja začetek ukinjanja notranjih mej.

### **2.1.10 Širitev (1986)**

- Skupnostim se pridružita Španija in Portugalska.

### **2.1.11 Enotni Evropski akt (1992)**

- Dopolnitve in spremembe pogodbe o gospodarski skupnosti.
- Enotni evropski akt predstavlja temelj za ustanovitev skupnega notranjega trga.
- V okviru akta se je utemeljilo svobodno gibanje blaga, oseb, storitev in kapitala.
- Dokument je določal skupne politike na ekonomskem, monetarnem in socialnem področju ter politiko na področju varstva okolja, raziskav in razvoja.
- Zastavljena je bila strukturna politika v obliki pomoči manj razvitim regijam.

### **2.1.12 Pogodba o Evropska uniji - Maastrichtska pogodba (1993)**

- S to pogodbo je bila ustanovljena Evropska unija, kot jo poznamo danes.
- V okviru to pogodbe je prišlo do najobsežnejše revizije in dopolnitev obstoječih pogodb:
- Razvoj ekonomske in monetarne unije;



- Uvedba evropskega državljanstva;
- Krepitev vloge Evropskega parlamenta;
- Ustanovitev "Odbora regij" (posvetovalni organ).
- Maastrichtska pogodba vsebuje načrt vzpostavitve ne samo gospodarske in denarne unije, temveč tudi politične unije.
- Evropsko unijo predstavlja simbol templja s tremi stebri:
  - I. stebel ponazarja nadnacionalni značaj Unije z enovitim pravnim redom Skupnosti in skupno politiko;
  - II. stebel ponazarja skupno zunanjo in varnostno politiko;
  - III. stebel ponazarja sodelovanje na področju notranjih zadev in pravosodja.

### **2.1.13 Širitev (1995)**

- Evropski skupnosti so se pridružile Avstrija, Finska in Švedska.

### **2.1.14 Amsterdamska pogodba (1997)**

- Pogodba predstavlja dopolnitev Maastrichtske pogodbe, predvsem na področju II. in III. stebra.
- Zadane naloge v pogodbi obsegajo ureditev na področju državljanskih pravic, odpravo ovir za prosto gibanje, vzpostavitev učinkovitejše strukture delovanja Skupnosti in mednarodnega položaja Evropske unije.
- Problematika pravosodja in notranjih zadev se je vsebinsko premaknila iz III. v I. stebel - kar pomeni, da se odločitve v zvezi s področjema sprejemajo s strani institucij skupnosti.

### **2.1.15 Agenda 2000 (1997)**

- Dokument zajema reforme na področju regionalne politike, varstva okolja, dostopnosti kakovostne in varne hrane ter učinkovitejšega gospodarjenja s finančnimi sredstvi Unije.
- V Agendi 2000 so bili opredeljeni okvirji razvoja Evropske unije, institucionalno preoblikovanje, ki omogoča širjenje politike za prihodnje tisočletje ter določena finančna sredstva za obdobje 2000-2006.

### **2.1.16 Pogodba iz Nice (2001)**

- Na podlagi to pogodbe je prišlo do preoblikovanja institucij Evropske unije, s ciljem omogočiti izpeljavo širitve.
- Na podlagi to pogodbe se je glasovanje s kvalificirano večino razširilo na nova področja.

### **2.1.17 Evropska konvencija (2002)**

- Glavno nalogo Konvencije predstavlja preučevanje ključnih vprašanj razvoja Unije, poenostavitve delovanja Unije, razmejitve pristojnosti ter predložitev predlogov institucionalnih reform.

### **2.1.18 Akt o pristopu novih članic (2003)**

- 16. aprila 2003 je 10 držav pristopnic (med njimi tudi Slovenija) podpisalo pristopne pogodbe.

### **2.1.19 Ustava za Evropo (2003)**

- Pogodba zajema oz. nadomešča vse dotedanje pogodbe.
- Razdeljena je na štiri dele:
  - Opredelitev in cilji Evropske unije, temeljne pravice, državljanstvo, pristojnosti, institucije in financiranje Unije;
  - Listna o temeljnih pravicah Evropske unije;
  - Politika in delovanje Unije;
  - Splošne in končne določbe.

### **2.1.20 Vstop novih članic (2004)**

- 1. maja 2004 je prišlo do največje širitve Evropske unije v njeni zgodovini.
- Evropski uniji so se pridružile: Slovenija, Ciper, Češka, Estonija, Latvija, Litva, Madžarska, Malta, Poljska in Slovaška.

### **2.1.21 Slovenija prevzame Evro in širitev (2007)**

- Slovenija kot 13. država izpolni vse Maastrichtske kriterije in s 1. januarjem 2007 prevzame Evro.
- 25 državam članicam EU se pridružita še Bolgarija in Romunija.

V tej točki smo spoznali, da se je EU v 56 letih svojega obstoja močno spreminjala – tako številčno, kakor tudi upravno, sodno in zakonodajno. Istočasno pa se je spreminjal tudi način, odstotek in potreba po sofinanciranju s strani posameznih držav. Z večanjem števila držav članic EU se je zmanjševalo povprečje BDP-ja v EU, kar pomeni, da so lahko določene države, ki so bile pred širitvijo upravičene do nekega sofinanciranja, sedaj pristale nad mejo določeno za sofinanciranje in tako ostale brez njega (sofinanciranja), ali drugače povedano, prenehale so obstajati kot bruto prejemnice. S tem pa jim je prenehala pravica do črpanja iz določenih evropskih virov. V nadaljevanju bodo v točki 4.2 Iskanje ustreznega razpisa predstavljeni možni viri sofinanciranja, čeprav je to leto (2007) prelomno leto, saj se je s 1. januarjem začelo novo programsko obdobje in mnogo programov še nima natančno določenih podrobnosti o svojem delovanju.

## **3 MANAGEMENT EVROPSKIH PROJEKTOV**

### **3.1 Definicija pojma projekt in njegove značilnosti**

»V praksi skorajda ni podjetja ali druge združbe, kjer ne bi bilo potreb po projektih in projektneemu načinu dela, saj je v okoljih, kjer se podcenjuje pomembnost projektov in projektneega ravnanja, delovanje podjetij razvojno in poslovno neuspešno ter v podrejeni vlogi glede na svetovni trg« (Semolič, 2003, str. 13).

V literaturi je veliko opredelitev in definicij za projekt. Med seboj se bistveno ne razlikujejo, saj vsaka od njih vključuje vsaj nekaj skupnih značilnih pojmov, ki nastopajo v projektih, kot

so viri, čas, strošek, naloga, cilj, omejitve, začetek, konec, zaporedje, enkratnost, itd. (Luznik, 2006, str. 7).

Opredelitve nekaterih avtorjev:

- »Projekt je zaporedje nalog, ima svoj začetek in konec, je omejen s časom, viri in želenimi rezultati. To pomeni, da ima projekt specifičen in zaželen rezultat, določen skrajni rok za končanje projekta in omejen proračun, ki določa število ljudi, obseg sredstev in količino denarja na projektu« (Baker, 2000, str. 4).
- »Podjem<sup>4</sup>, dejavnost, ki jo sestavlja skupina med seboj povezanih aktivnosti, za katero je značilna enkratnost proizvoda ali storitve, časovna omejenost celotne dejavnosti in sodelovanje različnih sodelavcev pri projektu« (Rozman, 2002, str. 2).
- »S pojmom projekt imenujemo tako - praviloma enkratno - celotno dejavnost oziroma aktivnost, za katero je značilno, da ima skupne smotre in cilje, opredeljen začetek in konec ter opredeljeno zaporedje med seboj povezanih aktivnosti. Projekt lahko opredelimo kot celoto množice ciljev in množice aktivnosti. Lahko pa ga opredelimo tudi kot celoto množice aktivnosti in tehnološko pogojenega zaporedja teh aktivnosti, definirane z množico usmerjenih povezav med njimi« (Bizjak, 1996, str. 125).
- »Projekt je skupina medsebojno povezanih aktivnosti, ki imajo svoj cilj. Ta mora biti dosežen v okviru določenih omejitev. Projekt ima svoj začetek in konec ter troši vire (denar, ljudi, opremo)« (Kerzner, 1992, str. 2).

Navedene opredelitve, ki veljajo za vsakršne projekte, zelo dobro opredeljujejo tudi EU projekte, za katere veljajo naslednje značilnosti: (Povzeto po zgornjih opredelitvah)

- Projekt je glede na način izvedbe enkratni podjem, zato se projektni način dela uporablja predvsem pri uvajanju sprememb, ne pa pri ponavljajočih se nalogah.
- Projekt je sestavljen iz medsebojno povezanih in odvisnih aktivnosti, ki jih imenujemo naloge in jih navadno izvaja več oseb.
- Projekt ima svoj začetek in konec.
- Končni cilj projekta je določen ter največkrat opredeljen s končnim izdelkom, rokom izdelave in stroški.
- Pot do cilja je kompleksna in zahteva veliko dela zaposlenih ter materialnih in finančnih sredstev.
- Projekt mora imeti točno določene časovne okvire. Pri spremljanju projekta je eno od pomembnih meril učinkovitosti prav pravočasna izvedba zastavljenih nalog.
- Projekt zahteva vire. Pod pojmom viri ne mislimo samo na ljudi, ampak tudi denar, opremo, stroje, material itd. Vsi ti viri morajo biti določeni in zagotovljeni.

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<sup>4</sup> Razlaga pojma - Podjem: književno, redko dejanje, načrt: pripraviti skupen podjem; izvršitev določenega dela).

### 3.2 Definicija pojma Management in Manager

Tudi pojma management in manager različni avtorji različno opredeljujejo. Poglejmo si nekaj najvidnejših razlag.

#### 3.2.1 Manager

- »Manager usmerja človeške in materialne vire ter vodi delo oddelka ali organizacije. Managerji predstavljajo le del zaposlenih v organizaciji in so ocenjevani z vidika, kako uspešno opravljajo delo drugi. Managerji morajo določati načrte dejavnosti, s katerimi bi kar najbolj učinkovito in uspešno dosegli cilje organizacije« (Možina, 1994, str. 15).
- »Managerji planirajo, organizirajo, vodijo in kontrolirajo ali pa planirajo, uveljavljajo in kontrolirajo« (Rozman, 1996, str. 8).
- »Managerji dosegajo organizacijske cilje s pomočjo ljudi, sodelavcev, ki imajo različne sposobnosti, znanje in izkušnje, zato moramo biti sposobni oceniti te zmožnosti in jih uskladiti z zahtevami dela. Ne samo to, zaposlene, če želimo, da bodo zadovoljni in uspešni, moramo znati ustrezno navdušiti in jih pripraviti za nenehno učenje« (Možina, 2002, str. 13).
- »Za managerje je čas najbolj dragocen in omejen resurs, saj ga ne morejo najeti ali kupiti. Za učinkovitejše izkoriščanje svojega časa si lahko pomagajo s tehnikami časovnega managementa« (Vahčič, 2002, str. 96).

#### 3.2.2 Management

- »Management je planiranje, organiziranje, vodenje in kontroliranje dela v organizaciji in s tem v zvezi vseh nalog in aktivnosti, ki jih zaposleni opravljajo. Cilji organizacije dajejo pobude in vodila za te naloge in aktivnosti. Management je v bistvu usklajevanje nalog in dejavnosti za doseg postavljenih ciljev« (Možina, 1994, str. 16).
- »Management se pojavlja v vsaki organizaciji. Organizacija ima svoje značilnosti, ki vplivajo na managerje in na vse zaposlene. Organizacija ima svoje posebnosti, ki se nanašajo na prednosti in slabosti, probleme in možne rešitve, zato mora manager spoznati in razumeti svojo organizacijo ter jo ustrezno razvijati. Če je ne more spoznati in razumeti popolnoma, je dobro že, če se dokoplje do spoznanj; kaj je v dani situaciji bolj ali manj pomembno oziroma všečno ali nezadovoljivo opravljeno« (Možina, 2002, str. 13).
- »Management je umetnost osredinjanja in združevanja na videz dveh nasprotujočih si dejavnikov. Tako se od vodstva zahteva po eni strani trdnost pri delu in odločanju, po drugi strani pa gibljivost in prilagodljivost. Skratka skorajda sočasno akcijo in reakcijo,

lokalno razumevanje in globalno perspektivo, osredotočanje na današnje in jutrišnje probleme organizacije« (Možina, 2002, str. 13).

- »Management je posebna oblika ravnanja, značilna za lastniško upravljanje. Managerstvo je zaupniški in izvršilni organ kapitala, ki s svojim ravnanjem zagotavlja uresničitev njegovih potreb in ciljev kot subjekta gospodarjenja. Managerstvo je sicer ravnanje ljudi, a ti ljudje so nosilci posebnega družbenoekonomskega razmerja, meznega razmerja« (Lipovec, 1987, str. 143).
- Management je glavni resurs razvitih držav in najpotrebnejši resurs nerazvitih; je proces, v katerem ena skupina usmerja delovanje drugih v smeri doseganja skupnih ciljev; je neposredna aktivnost posameznika ali skupine z namenom koordinacije aktivnosti drugih, ki jih ne more opraviti ena sama oseba; je oblikovanje učinkovitega okolja za delo ljudi v formalnih organizacijskih skupinah; je proces izvajanja planiranja, organiziranja, vodenja in kontrole ljudi in ostalih resursov z namenom doseganja postavljenih ciljev podjetja (Kovač, 2007, diap. 12-14).
- »Po Fayolu ima management pet funkcij: planiranje, organizacija, ukazovanje, koordinacija in kontrola« (Oldcorn, 1990, str. 21).

### **3.3 Tri vrste manageriranja evropskih projektov**

Management evropskih projektov je skupek lastnosti, ki jih težko najdemo zbrane v eni sami osebi, saj poleg uspešnega vodenja, upravljanja, nadziranja in ukrepanja v fazah, ki zajemajo identificiranje projekta, prijavo projekta, pogajanja z evropsko komisijo, koordinacijo projekta in zaključek evropskega projekta zahtevajo tudi vsako letno poročanje o stanju projekta, njegovem razvoju, porabi sredstev, itd.

Zato je treba pri pisanju evropskih projektov delitev managementa na tri dele: na administrativni, finančni in strokovni management.

V projektne partnerstvu je določeno podjetje, ki skrbi za management projekta. V večini primerov je to kar vodilni projektne partner ali koordinator, lahko pa se delo managementa zaupa tudi drugemu projektne partnerju.

V Evropi velja nenapisano pravilo, da je treba za management projekta nameniti od 8-10% celotnega projektne proračuna (odvisno od velikosti in obsežnosti projekta). Podjetje, ki izvaja projektne management določi glavnega projektne managerja, ki bdi nad celotnim projektom in prevzame delo administrativnega managerja, istočasno pa določi tudi managerja ostalih dveh tipov projektne managementa.

Projektne management je usklajevanje tehnično razdeljenega dela, da postane nova celota, istočasno pa nadzoruje potek celotnega projekta. Je splet različnih managerskih del, saj

uskklajuje in nadzira delo administrativnega managementa (npr. preverjanje obveščnosti projektnih partnerjev o posameznih aktivnostih v projektu), usklajuje in nadzira tudi delo finančnega managementa, saj so finance, njihova točnost in namenskost zelo pomemben del uspešnega projekta, ravno tako pa je treba nadzorovati delo strokovnega managementa, ki skrbi za strokovno plat projekta (združevanje vsebin, poročanje o poteku projekta, nadzor dela projektnih partnerjev, itd).

### **3.3.1 Administrativni management**

Administrativni management je odgovoren za nemoteno in čimbolj usklajeno delovanje projekta. Skrbi za sprotno obveščnost vseh vpletenih v projekt o delovanju projekta, aktivnostih, obveznostih, usmeritvah, itd.

V fazi same priprave projektne dokumentacije skrbi administrativni management za izpolnjevanje projektne dokumentacije po navodilih razpisovalca, saj je treba natančno prebrati navodila razpisovalca in tem pravilom "slepo" slediti. V kolikor je za določeno točko v projektnih obrazcih namenjenih npr. 1000 znakov, je treba preoblikovati vsebino tako, da bo smisel tistega dela izražen s 1000 znaki ali manj. Nikakor pa se pravil ne sme kršiti, saj v tem primeru projekt ne zadosti kriterijem sprejemljivosti (Eligible criteria) in je zavrnjen že na samem začetku. Projekt se vsebinsko sploh ne oceni.

### **3.3.2 Finančni management**

»Vloga finančnega managementa ni samo, da pod sprejemljivimi pogoji priskrbi kapital za financiranje delovanja podjetja v skladu z zahtevami, ki sta jih oblikovala proizvodnja in trženje. Finančni manager je aktiven pri načrtovanju in ovrednotenju potencialno izvedljivih projektov. Zato mora kratkoročno in dolgoročno oceniti stroške in koristi uporabe podjetniških sredstev v različnih projektih. Poiskati mora možne vire sredstev in oceniti njihove stroške, izbrati projekt, ki najbolj ustreza cilju maksimiranja vrednosti podjetja ter ob tem ovrednotiti njegovo tveganje in donosnost« (Zbašnik, 1994, str. 16).

»Finančni managerji so odgovorni za pridobivanje in porabo sredstev s smislu maksimiziranja vrednosti njihovega podjetja« (Brigham, 1997, str. 29).

Finančni management je pri evropskih projektih prisoten že od samega začetka, saj je po oblikovanju delovnih paketov (Work packages) potrebna priprava detajlne finančne slike, kar pomeni, da je že vnaprej znano koliko partnerjev sodeluje pri vsaki akciji in kakšne kategorije stroškov bodo pri vsaki akciji prisotne. Za vse projektne partnerje je treba po delovnih paketih ali akcijah prikazati finančno obremenjenost glede na finančne porabnike. Seveda ni odveč omeniti, da je treba stroške prikazati čimbolj realno glede na porabljeno delovno silo, podizvajalce, potovanja, organizacijo delavnic, seminarjev, porabe materiala, ostalih neposrednih in posrednih stroškov (posredni stroški so ponavadi omejeni na 7% glede na

stroške osebja ali pa so omejeni z določenim odstotkom glede na celotni proračun posameznega partnerja).

Vloga finančnega managerja je tudi, da skrbi za zbiranje finančnih poročil, njihov pregled in oddajo vseh poročil komisiji. Finančni manager skrbi tudi za razdelitev denarja, ki ga sofinancira evropska komisija in katerega odstotek je določen v pogodbi, ki jo podpišeta koordinator projekta ter odgovorni s strani evropske komisije.

Preostale finance potrebne za izpeljavo projekta zagotovijo vsi projektni partnerji (ob pristopu k projektu podpišejo Pismo o nameri (Letter of Commitment – LoC), s katerim se zavežejo k izpolnjevanju nalog in zagotovitvi potrebnih sredstev). Seveda mora finančni manager preveriti zahteve programa o finančni ustreznosti projektnih partnerjev (podjetje mora biti solventno, ne sme prejemati državne pomoči, ne sme biti v fazi prestrukturiranja, ne sme biti v postopku likvidacije ali stečaja, ne sme biti kaznovano, itd).

Tu velja omeniti še, da projektni partnerji nikoli ne nakazujejo nikakršnih zneskov na račun koordinatorja. Svojo finančno udeležbo v projektu prikazujejo v finančnih poročilih s porabljenimi delovnimi urami, računi podizvajalcev, stroški potovanj, itd.

### **3.3.3 Strokovni management**

Strokovni management je edini izmed vseh treh tipov managiranja evropskih projektov, ki ne more biti izvajan s strani nekoga drugega, ki ni idejni vodja projekta (koordinator, vodilni partner).

Strokovni management skrbi za vsebinski vidik projekta, saj skrbi za pripravo vsebin, združevanje različnih vsebin, razvoj ideje, njeno implementacijo in skrb za nadaljevanje in širitev dela po končanju samega projekta.

Strokovni management skrbi tudi za pisanje vsebinskega dela poročil in za nadzor poteka dela posameznih projektnih partnerjev glede na zastavljeno pot. V kolikor kakšen projektni partner ne izvaja svojega dela korektno, ali z delom zaostaja za predvidenim načrtom, ga mora opozoriti, ravno tako pa mora to vpisati v poročilo in tako opozoriti pristojne organe s strani evropske komisije. V kolikor se takšno početje s strani projektnega partnerja nadaljuje, lahko z dovoljenjem evropske komisije projektno partnerstvo partnerja zamenja, saj s svojim početjem ogroža izvedbo celotnega projekta.

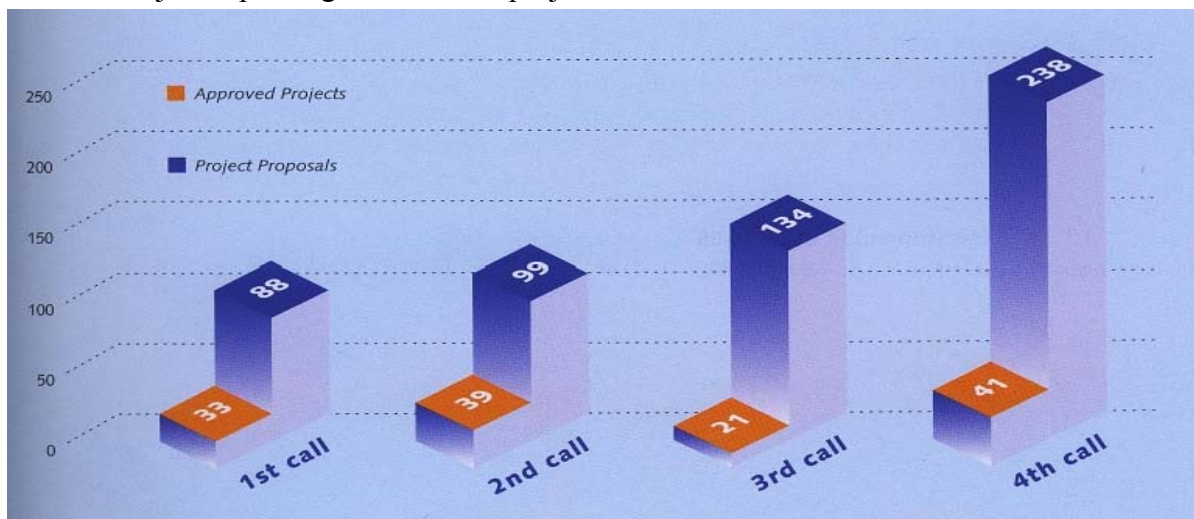
### **3.4 Slovenija in evropski projekti**

V Evropi je moč zaslediti porast prijave projektov, kar posledično pomeni, da je potrebna vedno strožja evalvacija. Ocenjevalci projektov odobrijo nepovratna sredstva samo še za zelo dobre projekte, kar pomeni odlično idejo, vseevropsko dimenzijo, majhne in realne stroške ter odličen management.

S spodnje slike je razviden porast oddanih projektnih predlogov in število odobrenih projektov po razpisih v letih od 2000-2006 na programu Interreg IIIB Cadses. Pri prvem razpisu (na začetku programskega obdobja) je prispelo 88 projektnih predlogov in jih bilo 33 odobrenih (37.5%), medtem ko je prispelo na četrti razpis (konec programskega obdobja) 238 projektov in jih bilo odobrenih 41 (17%).

Kljub temu, da zajema obravnavani primer podatke samo za program Interreg III B Cadses, je jasno razvidna tendenca naraščanja števila oddanih predlog projektov.

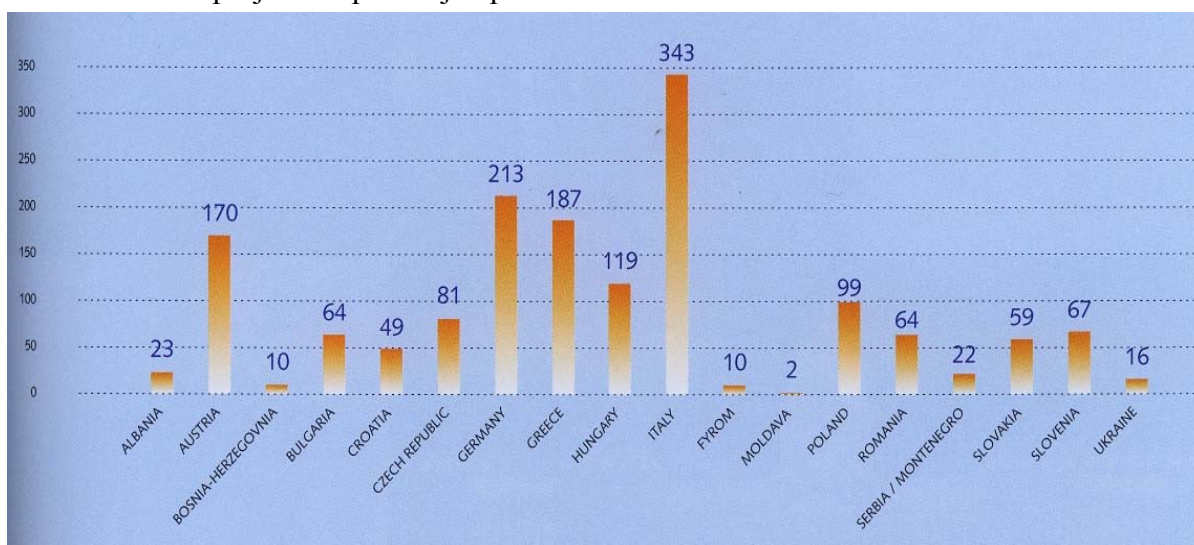
Slika 1: Projektni predlogi in odobreni projekti



Vir: Interreg III B Cadses Project Book, 2006, str. 9.

Kljub porastu oddanih evropskih projektov pa Slovenija še vedno zaostaja za Zahodno evropskimi državami kot so na primer Italija, Španija, Irska, itd.

Slika 2: Število projektnih partnerjev po državah

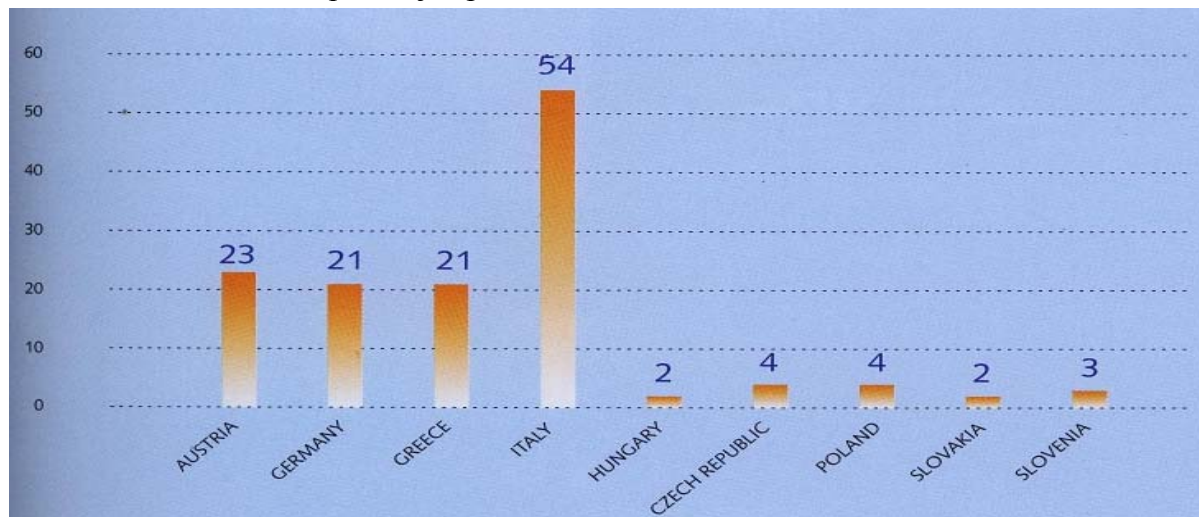


Vir: Interreg III B Cadses Project Book, 2006, str. 11.



Sliki številki dve in tri nam prikazujeta število partnerjev, ki izhajajo iz posameznih držav in število vodilnih partnerjev iz posameznih držav za program Interreg III B Cadses. Kot je razvidno iz slik, je Slovenija nekje v povprečju med novimi članicami v EU, močno pa zaostaja za npr. Italijo, Grčijo, Nemčijo in Avstrijo.

Slika 3: Število vodilnih partnerjev po državah



Vir: Interreg III B Cadses Project Book, 2006, str. 11.

#### 4 PRIPRAVA PROJEKTA ZA PRIJAVO NA RAZPIS

Zelo pomembno dejstvo, ki pa se ga vedno premalo upošteva je, da mora biti prijava na razpis in posledično pridobitev nepovratnih sredstev posledica in ne povod za definiranje projektov. Podjetja v želji po evropskem denarju po odprtju razpisa ali programa zelo hitro in večinoma brez ustrezne ideje in strokovnega zaledja spišejo projekt, ki pa je, v kolikor že ustreza sprejemnim kriterijem, napisan zelo površno in zato praviloma ocenjen negativno.

Koncept dobre prakse je pokazal, da je čas, potreben za razvoj in pisanje uspešnega projekta raztegnjen na dobo vsaj enega leta, saj je treba, da metodologija dela, s katero se prijavljamo na mednarodni razpis vsebuje vse dele od razvoja projektne ideje pa vse do oddaje projekta.

Metodologija dela zajema:

- Razvoj projektne ideje;
- Iskanje ustreznega vira sofinanciranja;
- Pisanje projektne osnutka "The Concept Note Format";
- Razvoj in koordinacija projektne partnerstva – iskanje, preverjanje in vzpodbujanje partnerjev za sodelovanje pri projektu;
- Priprava logične matrice (Logical Framework) – ta faza poteka sočasno s pripravo osnutka projekta;
- Priprava stroškovnega plana – ocenjevanje in priprava vseh upravičenih stroškov za nastanek projekta;
- Razdelitev dela med posamezne projektne partnerje – kaj naj kdo dela, kdaj in zakaj, da bo projekt uspešno zaživel;

- Priprava projektne dokumentacije za prijavo na mednarodni razpis – izpolnitev vseh potrebnih obrazcev, tabel in prilog ter zagotovitev kvalitete in neoporečnosti prijave in podatkov uporabljenih v prijavi.

#### **4.1 Razvoj projektne ideje**

Razvoj projektne ideje je ponavadi delo razvojnega tima v posameznem podjetju ali posamezne osebe, ki je v nekem podjetju določena za generiranje takšnih idej, in nima neposredne povezave z manageriranjem projekta.

»Pametno se je najprej vprašati ali bo projekt implementiran tudi brez razpisnega denarja. Samo če je odgovor pritrdilen se izplača nadaljevati. Če je projekt konsistenten in če vanj verjamete, je treba presoditi, ali sodi v določen program in kakšne možnosti ima, ter pripraviti kakovostno prijavo, da lahko komisija na osnovi postavljenih programskih kriterijev ugotovi skladnost s programom oziroma prispevek projekta k uresničevanju programskih ciljev« (Filipič, 2006, 5/3, str. 3).

Brez projektne ideje ni smiselno iskati razpisov, saj kot je bilo že prej omenjeno, je smiselno zgolj to, da je prijava na razpis in posledično pridobitev nepovratnih sredstev posledica in ne povod za definiranje projektov. V kolikor je projektna ideja dobra in zrela za nadaljnjo implementacijo, se poskuša poiskati zanjo ustrezen finančni vir.

Priporočljivo je, da se še pred iskanjem ustreznega finančnega vira naredi tudi podroben poslovni načrt.

»Poslovni načrt je eden izmed načinov preverjanja podjetniške ideje. S poslovnim načrtom podjetnik po sistematični planirani poti preveri, ali je ideja tržno, finančno in organizacijsko zrela, da jo lahko tretiramo kot poslovno priložnost. Poslovni načrt je torej pisni dokument, v katerem podjetnik jasno opredeli svoje cilje pri določenem poslu in strategije, s katerimi namerava doseči te cilje« (Vahčič, 1998, str. 8).

#### **4.2 Iskanje ustreznega vira sofinanciranja**

Iskanje ustreznega vira sofinanciranja je odvisno od same narave projektne ideje. Ideja je lahko poslovne narave, lahko gre za izobraževanje, zaposlovanje, gradnjo, storitve, dobavo, planiranje, itd. Za vsako idejo se lahko najde ustrezen razpis, samo vztrajen je treba biti. Pri evropskih projektih se ponavadi zahtevata evropska dimenzija (partnerji iz različnih evropskih držav) in skrb za javno dobro.

»Ko je razpis odprt, je treba najprej temeljito prebrati vso spremljajočo dokumentacijo in ugotoviti, ali je razpis sploh primeren za nas tematsko in glede na postavljene pogoje, kakšen je rok zaključka prijave, katere dokumente je treba priložiti, na kateri naslov (včasih tudi naslove) je treba poslati prijavo in podobno« (Filipič, 2006, 5/3, str. 3).

Vsak program še pred objavo razpisa razpiše datum za tako imenovani Informacijski dan, kjer se predstavi celoten program in zahteve, ki jih morajo prijavitelji izpolnjevati, da zadostijo kriterijem programa. V kolikor prijavitelj meni, da se bo na ta program prijavljaj, je zelo priporočljivo, da se tega Informacijskega dneva tudi udeleži, saj so ponavadi omogočeni tudi bilateralni sestanki, kjer prijavitelj predstavi idejo programa članu programske komisije.

Za slovenska podjetja, ki so tržno usmerjena, so najpomembnejši programi, ki spodbujajo podjetništvo (to je predvsem Eureka).

Vprašanje je predvsem za kakšno poslovno idejo gre - ali gre za zelo zgodnjo fazo poslovne ideje, ki potrebuje predvsem možnosti sofinanciranja za raziskave in razvoj in je do preboja na trg še zelo oddaljena (doba do prihoda na trg je ocenjena na približno pet let). Tu bi se splačalo spremljati razvoj 7. okvirnega programa (Seventh Framework Programme), ki je namenjen predvsem takšnim idejam.

V kolikor je ideja že bolj zrela (doba do prihoda na trg je ocenjena na približno dveh do treh let) se lahko vir poišče v programu CIP (The Competitiveness and Innovation Framework Programme), ki je bil oblikovan ravnokar in so mu bila dodeljena sredstva za obdobje 2007-2013.

Potem pa je tu še možnost prijavljanja projektnih idej, ki so že pripravljene za prodor na trg. Takšne ideje je priporočljivo prijaviti na program Eureka, kateri poleg sofinanciranja nudi tudi podelitev oznake Eureka projekt, ki v poslovnem svetu pomeni zelo veliko. Projekti, ki se lahko pohvalijo s to oznako so ponavadi zelo dobri projekti, katerim so široko odprta vsa vrata in uspeh skorajda zajamčen.

Seveda so to le trije programi od mnogih, ki jih razpisuje tako EU, kakor tudi posamezne države (ministrstva).

Viri sofinanciranja so deloma predstavljeni v spodnji tabeli, vendar je zaradi dinamike spreminjanja programov in namena financiranja priporočljivo vire spremljati neposredno na internetnih straneh in Uradnem listu (UL RS in UL EU).

V kolikor lastnik ideje ni večš iskanja razpisov, oziroma se prvič prijavlja na mednarodne razpise, je to točka, kjer je že priporočljivo najetje strokovnjaka, saj je to delo že del projektnega managementa in sicer administrativnega managementa.

Tabela 1: Pregled finančnih instrumentov

Skupina	Instrument – Namen	trajanje do:	Infrastruktura			Podjetništvo			Človeški viri			Vertikalna področja razvoja		Horizontalna področja razvoja			
			Transpor-tna	Okoljska	Drugo (telekomun., energija...)	Investicijske podpore vseh oblik (oprema, prostor)	Raziskave in razvoj (vključno s povezano infrastr. in invest.)	Podpora mehkim projektom (svetov., analize trgov...)	Izobraž. in usposabljanje	Socialna vključenost	Sistemi izobraževanja in usposabljanja	Kmet. in ribištvo	Kultura in mediji	Trajnostni razvoj	Informacijska družba	Enakost možnosti	
Strukturni skladi	ESRR	2013	1	1	1	2,7	2,3	2,3,4,5,7									
	ESS	2013							1,2,3,4,5,7	1,2,3,4,5,7	1,2,3,4,5,7						
	EKUJS		TRENUTNO ŠE NI VZPOSTAVLJENIH NOVIH PROGRAMSKIH DOKUMENTOV														
	FIUR		TRENUTNO ŠE NI VZPOSTAVLJENIH NOVIH PROGRAMSKIH DOKUMENTOV														
Pobude skupnosti	Kohezijski sklad	2013	3	3													
	INTERREG	2013	1,2,3,7	1,2,3,7		1,2,3,7	1,3,7	1,2,3,7	1,2,3,7	1,2,3,7	1,2,3,7		1,2,3,7	1,2,3,7	1,2,3,7		
Programi skupnosti	EQUAL		TRENUTNO ŠE NI VZPOSTAVLJENIH NOVIH PROGRAMSKIH DOKUMENTOV														
	Program razvoja podeželja	2013										6					
Programi skupnosti	7. Okvirni program EU	2013					2,3	2,3,7	4,5			3,4,5			2,3,7	2,3,7	
	Večletni program za podjetja in podjetništvo		TRENUTNO ŠE NI VZPOSTAVLJENIH NOVIH PROGRAMSKIH DOKUMENTOV														
	EUREKA	trajno	2	2	2	2	2								2	2	
	Program Vseživljenjsko učenje	2013					2,3,7	2,3,7	1,2,3,4,5,6,7	1,2,3,5,6,7	1,2,3,4,5,6,7		1,2,3,4,5,6,7	1,2,3,4,5,6,7	1,2,3,4,5,6,7	1,2,3,4,5,6,7	
	Mladina v akciji	2013							1,3,5,7	1,3,5,7	1,3,5,7				1,3,5,7	1,3,5,7	1,3,5,7
	Pr. Sk. za enakost med spoloma	2013	TRENUTNO ŠE NI VZPOSTAVLJENIH NOVIH PROGRAMSKIH DOKUMENTOV														
	Akc. Pr. Sk. za boj proti soc. izklj.	2013	TRENUTNO ŠE NI VZPOSTAVLJENIH NOVIH PROGRAMSKIH DOKUMENTOV														
	Spodbude sk. na področju zaposl.	2013	TRENUTNO ŠE NI VZPOSTAVLJENIH NOVIH PROGRAMSKIH DOKUMENTOV														
	Intelig. energija za Evropo	2013		2,3,7	2,3,7	2,3,7	2,3,7	2,3,7	2,3,7			2,3,7			2,3,7	2,3,7	
	eContent Plus	2008							1,2,3,4,7								1,2,3,4,7
	Varnejši inter.+	2008															8
	Program Kultura	2013									4,7				2,3,4,7		8
	Media Plus	2013												2,3,4,7			8
Pomoč tretjim državam	TACIS		2,3	2,3	2,3	2		2,3	2,3	3	3			3		3	
	CARDS		2,3	2,3	2,3	2		2,3	2,3	3	3			3		3	
	MEDA II		2,3	2,3	2,3	2		2,3	2,3	3	3			3		3	

Legenda ciljnih skupin: 1 občine, 2 zasebni sektor, 3 institucije javnega sektorja, 4 posamezniki, 5 mladi, 6 kmetje, 7 nevladne organizacije in neprofitni

Vir: Wostner, 2005, str. 24-25.

### 4.3 Pisanje projektnega osnutka

Ko za svojo projektno idejo najdemo ustrezen vir sofinanciranja je priporočljivo (za nekatere programe je celo obvezno) pripraviti projektne osnutke, s katerim na približno treh straneh povzamemo bistvo projektne ideje.

S projektne osnutkom (v angleškem jeziku je to The Concept Note Format, uporablja pa se tudi izraz Pre-proposal) lahko idejo projekta predstavimo ocenjevalni komisiji še pred glavnim ocenjevanjem ter si s tem zagotovimo predhodno povratno informacijo o ustreznosti našega projekta glede na razpis in potrebe programa.

Pri pisanju projektnega osnutka je treba uporabiti naslednjo tipologijo, skozi katero se da odgovoriti na nekatera ključna vprašanja:

- Povzetek projekta:
  - Kratek opis predvidenega projekta.
- Pomembnost:
  - Kako pomemben je naš projekt za potrebe ciljne države oziroma regije?
  - kateri so problemi, ki jih je treba rešiti in zahteve, katerim je treba ugoditi?
  - Kdo so glavni udeleženci tega projekta (končni uporabniki, ciljne skupine)?
  - Kakšni so cilji in kakšni so pričakovani rezultati?
  - Kaj je dodana vrednost projekta (kaj to pomeni za lokalno in nacionalno politiko in kaj za privatni sektor)?
- Metodologija in primernost projekta:
  - Kaj so glavne aktivnosti projekta?
  - Kdo bodo naši glavni partnerji, kako bodo vpleteni v projekt in koliko časa že sodelujemo?
  - Kako bo projekt lahko dosegel svojo sprejemljivost?
  - Se ga bo lahko ponovno uporabilo?
- Izkušnje in operativne zmožnosti:
  - Kakšne izkušnje imamo za vodenje in upravljanje projektov?
  - Kakšne so naše izkušnje in izkušnje naših partnerjev za reševanje novo-nastalih problemov v zvezi s projektom?

Pri pisanju projektnega osnutka so nam lahko v veliko pomoč tudi računalniški programi za oblikovanje miselnih vzorcev, ki nam na zelo preprost način predstavijo vse zahteve za določen program. S tem ko oblikujemo takšen miselni vzorec, zmanjšamo možnosti za razne napake, ki lahko povzročijo zavrnitev projekta na prvostopenjski kontroli<sup>5</sup>.

Kaj je miselni vzorec? (Buzan, 2004, str. 22-30).

- Je najenostavnejši način za vnos podatkov v možgane.
- Je najenostavnejši način priklica podatkov iz možganov, ko jih potrebujemo.

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<sup>5</sup> Vsak prijavljeni projekt je podvržen večplastni kontroli, preden se ga sprejme v sofinanciranje.

Značilnosti miselnih vzorcev: (Buzan, 2004, str. 22-30).

- Bistvo je v centru in iz osnovnega pojma se razvijejo vse misli;
- Vsaka veja (vsaka misel), nosi svojo barvo, kar povzroči selektivno zaznavanje;
- Preprosto za gledanje, branje, razmišljanje in lažje pomnjenje;
- Možgani si najlažje zapomnijo sliko in miselni vzorec je slika, ki si jo vtisnimo v spomin.

Slika 4: Načrtovanje projekta



Vir: Lastni vir.

Računalniških programov pa se ne poslužujemo zgolj za pripravo miselnih vzorcev. Pri planiranju projekta nam zelo prav pridejo tudi razni programi, s katerimi lahko projekt časovno ovrednotimo in razbijemo na posamezne opravilne naloge (Work packages). Tak program je na primer MS Project.

»MS Project nam omogoča enostavno načrtovanje, izvajanje in spremljanje projektov. Dokaj kompleksen program vključuje funkcije kot so: definiranje aktivnosti in njihovih časovnih omejitev, opredelitev in nadzor odgovornih oseb, direktna komunikacija s člani projekta, spremljanje porabe časa članov projekta in porabe stroškov pri izvedbi projekta ter grafična predstavitev terminskega načrta. Na trgu pa obstajajo še številni drugi programi za planiranje projektov (Harvard Project Manager, Project Scheduler, SuperProject, in Time Line)« (Vahčič, 1998, str. 213).

#### 4.4 Razvoj in koordinacija projektne partnerstva

Iskanje projektne partnerje je odvisno predvsem od zahtev razpisa, na katerega se s svojo idejo prijavljamo. Za nekatere programe je dovolj samo en partner pri projektu, vendar tu ne moremo govoriti o partnerstvu. V večini primerov se zahteva partnerje iz vsaj treh različnih evropskih držav (npr. 7<sup>th</sup> FP), pri določenih projektih pa se zahteva Vseevropska dimenzija, kar pomeni, da mora biti v projekt vključenih čimveč evropskih držav (tak program je npr. eCONTENT+).

Različnost projektne partnerstva pa se ne kaže samo v zahtevanem številu partnerjev in nacionalnem izvoru, temveč tudi po poslovni dejavnosti podjetja in poslovnem učinku. Nekateri razpisi zahtevajo večje število podjetij, ki se ukvarjajo z raziskovalno dejavnostjo, drugi prepovedujejo večje število svetovalnih podjetij, tretji zahtevajo več javnih, četrti zahtevajo neprofitna podjetja, itd.

Paziti je treba tudi na to, da je dovoljena participacija podjetij iz določenih držav. Nekatera države, ki niso članice EU morajo za participacijo podpisati pogodbe in v kolikor se pogodba ne podpiše, se delo partnerjev iz teh držav ne sofinancira.

Izbor partnerjev se mora začeti veliko pred objavo razpisa, saj je potem, ko je razpis objavljen premalo časa, da bi skoordinali ustrezno partnerstvo. Sklenjene pogodbe (Partnership Agreement) in pisma o nameri (Letter of Intent ali Letter of Commitment<sup>6</sup>) zagotavljajo resnost partnerjev in točno opredeljujejo njihove pravice in naloge, istočasno pa projektu zagotavljajo doseg cilja.

Partnerje je treba v projekt povabiti na osnovi projektne potrebe, partnerjevega znanja in njegovega prispevka v dobro celotnega projekta. Pri izboru projektne partnerje je zelo pomembno tudi to, da projektne partnerje zadovolji vse zahteve razpisa glede finančne stabilnosti (poravnani vsi davki in prispevki, nima blokirane računa, ne prejema državne pomoči za preoblikovanje, je zmožen sofinancirati svoj delež v projektu, itd.), zato je projektne partnerje najlažje izbirati med podjetji s katerimi smo že sodelovali in jih poznamo. Veliko težje pa je poiskati projektne partnerje iz neke druge države, za katerega ne vemo, ali bo kos naloženemu delu.

V kolikor še ni oblikovanega projektne partnerstva je priporočljivo obiskovati Informativne dneve programa na katerega se mislimo prijaviti, saj je možnost kontakta s primernim projektne partnerjem tam večja. Lahko pa se jih išče preko nacionalne kontaktne točke, poizveduje na internetnih straneh aktualnih programov, ali pa se jih poišče na iskalnikih preko svetovnega spleta<sup>7</sup>.

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<sup>6</sup> Primer Pisma o nameri v angleškem jeziku (Letter of Commitment) se nahaja v Prilogi 1.

<sup>7</sup> Nekaj takšnih internetnih naslovov se nahaja v Prilogi 2.

Lahko pa se organizira mednarodno delavnico, kamor se povabi vse mednarodne partnerje, za katere se misli, da bi lahko sodelovali v projektu. Tam se partnerji med seboj bolje spoznajo, lažje se jim predstavi projektno idejo, jih navduši za sodelovanje in z njihovo pomočjo razdeli vloge in naloge v okviru projekta. Pomembna točka takšnega sestanka je tudi okvirna razdelitev projektnega proračuna, saj se lahko tako lažje doseže konsenz, kakor pa, da se o tem dopisuje preko elektronske pošte.

#### **4.4.1 Preverjanje poslovnega partnerja<sup>8</sup>**

Nepoznanega potencialnega domačega poslovnega partnerja za sodelovanje v evropskih programih se lahko preveri s pomočjo poslovnih in finančnih informacij (tako imenovane bonitete poslovanja). To so bogate zbirke podatkov, nekakšne osebne izkaznice za vse poslovne subjekte, registrirane na območju Republike Slovenije.

V slovenskem prostoru je več ponudnikov teh storitev.

- IPIS in iBON (izdajatelj: Noviforum d.o.o., <http://www.ibon.com>);
- GV IN (IGV d.o.o., <http://www.gvin.com>);
- AJPES (<http://www.ajpes.si>);
- Gospodarska zbornica Slovenije (<http://www.gzs.si>);
- I d.o.o. (<http://www.idoo.si>);
- Coface Intercredit d.o.o. (<http://www.coceintercredit.si>);
- Creditreform Slovenija (<http://www.creditreform.si>);
- Slovenska izvozna družba - SID d.d. (<http://www.sid.si>);
- Banke.

Večina teh ponuja vse finančne informacije in podatke o poslovnih subjektih in samostojnih podjetnikih, ki so oddali bilance za tekoče leto.

Prav tako ponujajo večino ostalih informacij, ki lahko pri iskanju poslovnega partnerja zelo koristijo (preverjanje plačilne sposobnosti, preverjanje likvidnostnih težav, poglobljene analize o poslovanju, tržne informacije ipd).

Za preverjanje tujih partnerjev je prav tako več načinov. Prvi je preko znancev (znanih podjetij), drugi preko podpornih institucij v izbranih državah, ministrstvih ali preko slovenskih veleposlaništev.

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<sup>8</sup> Večina poglavja povzeta po: Filipič, 2006, 7/2, str. 1, 2.



## 4.5 Priprava logične matrice

Kaj to logična matrica sploh je<sup>9</sup>?

Je analitično, predstavitevno in upravljalno orodje, razvito v pomoč planerjem in managerjem predvsem pri:

- analizi trenutne situacije med pripravo aktivnosti;
- vzpostavitvi logične hierarhije sredstev, skozi katere bodo doseženi cilji;
- identifikaciji potencialnih problemov pri doseganju ciljev in sprejemljivih rezultatov;
- razvitju naj-optimalnejše možnosti za ocenjevanje in nadzor vložkov in izročkov;
- pripravi povzetka aktivnosti v standardnem formatu, v kolikor je to zahtevano;
- nadzoru in kontroli aktivnosti med implementacijo.

Zakaj logična matrica?

- ker je to glavni rezultat procesa logičnega pristopa;
- ker je treba pristopiti k izpolnjevanju s pomočjo analize in logičnega razmišljanja;
- potreba po analizi obstoječe situacije;
- služi kot skupek ključnih informacij vezanih na projekt;
- ker prikazuje logično vez med aktivnostjo in učinkom (rezultatom);
- ker vse logične matrice delujejo po istem principu so lahko različni projekti hitro razumljeni in ovrednoteni.

V procesu priprave projektnega osnutka naj bi logična matrica služila kot priporočeno orodje za pregled projektnih aktivnosti, stroškov, kazalnikov, učinkov, medsebojnih vplivov, itd.

Uporabo logične matrice so prvi predlagali t.i. predpristopni evropski skladi (Phare, Cards,...). V programskem obdobju 2000-2006 se je izkazalo, da je logična matrica ne najbolj posrečeno orodje v fazi priprave projekta, ampak jo je mogoče uspešno izdelati šele v tisti fazi, ko je projekt že v celoti dorečen. Torej ne služi kot pripomoček za pripravo projekta, temveč kot pripomoček za pregled že izdelanega.

V pričujoči tabeli vidimo, da je zahtevane podatke nemogoče opredeliti v prvi fazi priprave projekta, saj temeljijo na že zaključenem in dodelanem projektu.

Primernejša pot v procesu priprave projekta je, da v izhodišču opredelimo "miselni vzorec" (glej poglavje št.: 4.3 Pisanje projektnega osnutka), ki nam dejansko omogoča vpogled v projektne zametke, ki bazirajo na slikovni predstavi in asociacijah.

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<sup>9</sup> Povzeto po: The Logical Framework Approach, 2005, str. 1 - 4.

Tabela 2: Logična matrica

LOGICAL FRAMEWORK				
	Intervention logic	Objectively verifiable indicators of achievement	Sources and means of verification	Assumptions
Overall objectives	<i>What are the overall broader objectives to which the action will contribute?</i>	<i>What are the key indicators related to the overall objectives?</i>	<i>What are the sources of information for these indicators?</i>	
Specific objective	<i>What specific objective is the action intended to achieve to contribute to the overall objectives?</i>	<i>Which indicators clearly show that the objective of the action has been achieved?</i>	<i>What are the sources of information that exist or can be collected? What are the methods required to get this information?</i>	<i>Which factors and conditions outside the Beneficiary's responsibility are necessary to achieve that objective? (external conditions) Which risks should be taken into consideration?</i>
Expected results	<i>The results are the outputs envisaged to achieve the specific objective. What are the expected results? (enumerate them)</i>	<i>What are the indicators to measure whether and to what extent the action achieves the expected results?</i>	<i>What are the sources of information for these indicators?</i>	<i>What external conditions must be met to obtain the expected results on schedule?</i>
Activities	<i>What are the key activities to be carried out and in what sequence in order to produce the expected results? (group the activities by result)</i>	<i>Means: What are the means required to implement these activities, e.g. personnel, equipment, training, studies, supplies, operational facilities, etc.</i>	<i>What are the sources of information about action progress? Costs What are the action costs? How are they classified? (breakdown in the Budget for the Action)</i>	<i>What pre-conditions are required before the action starts? What conditions outside the Beneficiary's direct control have to be met for the implementation of the planned activities?</i>

Vir: Logična matrica, 2007.

#### 4.6 Opredelitev delovnih paketov in razdelitev dela med posamezne projektne partnerje

Opredelitev aktivnosti v projektu morajo slediti opredelitvam v projektni nalogi (poslovnemu načrtu). Tako kot smo opisali razvoj dogodkov v projektnem osnutku, jih opišemo tudi v akcijskem planu, posamezne akcije potem podrobno razdelamo, sočasno pa tudi določimo katerega projektne partnerja bomo v kakšno akcijo vključili. Pri planiranju aktivnosti moramo imeti ves čas v mislih tudi kategorijo upravičenih stroškov, kajti le tako bodo stroški naših aktivnosti povrnjeni s strani programa.

V spodnji tabeli je predstavljen del akcijskega plana, ki je sestavljen iz šestih akcij. Vsaka akcija ima točno določen čas trajanja, določeno ima fazo, v kateri se akcija izvaja, opisano aktivnost in pričakovane izločke. Ravno tako je vsaka akcija ovrednotena s stroškom. Prva akcija ni ovrednotena s stroškom zaradi tega, ker gre za pripravo projektne dokumentacije in ta strošek ni upravičen (zanj ni možno dobiti sofinanciranja), je pa prikazana zaradi točnosti časovne opredeljenosti projekta.

Posamezni programi lahko zahtevajo podrobnejšo opredelitev akcij.

Tabela 3: Akcijski plan

Action No	Preparatory phase		Execution phase		Implementation phase		Description of activities, components, means	Expected output/deliverables	Costs (in €)
	Date of start	Date of end	Date of start	Date of end	Date of start	Date of end			
1	01.10.05	20.12.05					- Preparation of the project application, - developing and coordination of project partnership, - assignment of activities to each Project Partner.	Application package (application form, financial plan, letters of commitment)	0,00
2			01.04.06		31.03.08		- Technical management, - administrative management, - organisation and coordination of dissemination activities, - press releases, - kick-of meeting, - organisation of national and cross border workshops.	4 - press releases 2 - dissemination events 1 - kick-of meeting 4 - national and 4 cross border workshops	20.000,00
3			01.04.06		31.03.08		- Technical management of Croatian Project Partners, - administrative management of Croatian Project Partners, - organisation and coordination of dissemination activities in Croatia, - press releases in Croatia, - organisation of national workshops in Croatia.	4 - press releases 4 - national workshops	54.000,00
4			01.04.06	30.09.06			Market Analysis: - size of the Croatian market, - definition of potential users of legal information on Croatian market, - segmentation of the customers.	Research and report	30.000,00
5			01.04.06	30.09.06			Development of IT System: - the draft of the system structure, - analysis and design of the IT procedures.	Research study and report	45.000,00
6			01.10.06	31.03.07			Development of IT System: - execution of the system (coding, internal testing).	Report (software)	45.000,00

Vir: Lastni vir.

#### 4.7 Priprava stroškovnega plana<sup>10</sup>

Finančni plan projekta je poslovni načrt projekta, iz katerega je razvidno, kolikšna je cena vsakega dogodka v akcijskem planu in kdo ga bo opravil. Finančni plan temelji na tako imenovanih upravičenih stroških.

Upravičeni stroški zajemajo naslednje kategorije stroškov:

- stroški zaposlenih;
- stroški zunanjih sodelavcev;
- režijski stroški;
- potni stroški in stroški nastanitev;
- konference, seminarji, delavnice, srečanja in podobno;
- obveščanje in promocija;
- oprema;
- manjše investicije;
- drugo.

<sup>10</sup> Povzeto po: Priročnik za izvajanje prvostopenjske kontrole, 2007, str. 9-12.

#### **4.7.1 Stroški zaposlenih**

Stroški zaposlenih vključujejo plačo, davke in prispevke, v skladu z nacionalno zakonodajo na podlagi pogodbe o redni zaposlitvi. Navedeni stroški morajo biti preverjeni na podlagi dokumentov, ki omogočajo identifikacijo resničnosti stroškov plačanih s strani projektne partnerja.

Z delom zaposlenih se razume aktivnost osebe na projektu, ki ima s projektnim partnerjem sklenjeno pogodbo o rednem delovnem razmerju za nedoločen čas ali določen čas. Med upravičene izdatke za delo zaposlenih prištevamo plačo, vse pripadajoče davke ter prispevke in povračilo sorazmernega dela stroškov prehrane in prevoza na delo, ki dejansko bremenijo projektne partnerja.

Osnova za določanje upravičenih izdatkov je mesečno število opravljenih ur na projektu in urna postavka. Število opravljenih ur na projektu izhaja iz Evidence opravljenega dela, ki jo mora projektne partner obvezno voditi posebej za vsako osebo, ki sodeluje na projektu.

Ob koncu vsakega meseca projektne partner na osnovi Evidence opravljenega dela in dejanskih izplačil zaposlenim na projektu pripravi Izračun in izjavo o višini urne postavke za delo zaposlenega na projektu. Podatke o bruto plači projektne partner črpa iz plačilnega lista. V kolikor redno zaposleni le del svojega delovnega časa namenja projektu, je treba zneske iz plačilnega lista smiselno razdeliti po časovnem ključu.

Da bo zadoščeno resničnosti, pravilnosti, gospodarnosti in učinkovitosti bo projektne partner ob zahtevku za povračilo posredoval dokazila za vsako posamezno osebo, ki sodeluje na projektu in je zaposlena pri njem.

*Dokazila:*

- kopija pogodbe o zaposlitvi (le ob prvem poročilu) in imenovanje za delo na projektu
- evidenca opravljenega dela potrjena od odgovorne osebe
- izračun in izjava projektne partnerja o višini urne postavke za delo zaposlenega na projektu.

#### **4.7.2 Stroški zunanjih sodelavcev**

Pod izdatke za zunanje sodelavce štejemo delo ljudi, ki na projektu delajo na podlagi pogodbe o opravljanju storitev, avtorske pogodbe, podjemne pogodbe ali naročilnice. V pogodbi mora biti sklic na številko in naslov projekta. Do povračila so upravičeni tudi vsi davki in prispevki skladno z nacionalno zakonodajo, ki ureja posamezen tip dela, in dejansko bremenijo projektne partnerja.

*Dokazila:*

- originalni račun, kopija pogodbe, dokazilo o plačilu, napotnica študentskega servisa, končni izdelek (študija, gradivo).

### **4.7.3 Režijski stroški**

Vsi neposredni režijski stroški (običajna najemnina prostorov, poštni stroški, faks, telefon, kopiranje in drugo potrošno blago) se lahko vključijo v stroške projekta vendar je treba zagotoviti, da se stroški nanašajo na dejanske stroške, ki so nastali pri izvajanju projekta in jih smiselno razdeliti sorazmerno s porabo na projektu z jasno in pravično metodo. Metodo razdelitve režijskih stroškov mora projektni partner predstaviti in utemeljiti ob zahtevku za povračilo.

*Dokazila:*

- originalni račun in dokazilo o plačilu, če sta na voljo (npr. za pisarniški material), obračun in razdelilnik stroškov ter obrazložitev metode.

### **4.7.4 Potni stroški in nastanitev**

Splošno pravilo je, da mora biti izbran najbolj gospodaren način prevoza. Prevoz z letalom je upravičen strošek v ekonomskem razredu. Stroški za prenočišče na službenem potovanju v tujino so upravičeni v višini plačanega hotelskega računa za prenočevanje v hotelu nižje od luksuzne kategorije oz. skladno z določili Uredbe o povračilu stroškov za službena potovanja v tujino. Domače in tuje dnevnicе ter kilometrina so upravičen strošek do višine, kot je določeno za zaposlene v javnem sektorju in kot to določa Uredba o povračilu stroškov za službena potovanja v tujino. Dolžina službene poti mora biti razvidna iz potnega naloga in drugih priloženih dokumentov. Do dnevnic in potnih stroškov so upravičeni samo zaposleni pri projektnemu partnerju.

*Dokazila:*

- potni nalog s prilogami (originalni račun, vozovnica, boarding-pass, potrdilo, zapisnik ali lista prisotnosti, vabilo, dnevni red, poročilo o službeni poti), potrdilo o izplačilu - blagajniški izpis, da so potni stroški poravnani.

### **4.7.5 Konference, seminarji, delavnice, srečanja in podobno**

Izdatki, ki so povezani z organizacijo seminarjev, delavnic in srečanj morajo biti dokumentirani na podlagi pogodb in računov z zunanjimi izvajalci.

*Dokazila:*

- originalni račun, dokazilo o plačilu, gradivo, vabilo, dnevni red, lista prisotnosti, fotografije.

### **4.7.6 Obveščanje in promocija**

V to kategorijo spadajo: sporočila za javnost, članki v časopisih, zgibanke, letaki, TV oddaje, brošure, poročila in drugi stroški obveščanja. Izdatki morajo biti plačani na podlagi pogodb oziroma računov. Upoštevati je treba zakonodajo s področja javnih naročil.

*Dokazila:*

- originalni račun, dokazilo o plačilu, kopije pogodbe, letaki, kopija članka, brošura in drugo.

#### **4.7.7 Oprema**

Nakup opreme, ki je neposredno potrebna za izvajanje projekta se šteje za upravičen strošek. Če se potrebuje oprema npr. za krajši čas, je bolj smiselno opremo najeti kot kupiti. Pri nakupu opreme je treba upoštevati zakonodajo s področja javnih naročil.

Strošek amortizacije je upravičen strošek le pod pogoji:

- da ista oprema ni bila kupljena s pomočjo kakšne druge pomoči;
- da je strošek amortizacije izračunan po ustreznih računovodskih metodah;
- da se amortizacija nanaša na obdobje projekta.

Stroški amortizacije se priznajo kot upravičen strošek samo za tisto opremo, ki še ni v celoti amortizirana in sicer samo za sorazmerni delež stroškov amortizacije za obdobje izvajanja projekta.

*Dokazila:*

- originalni račun, dobavnica, zapisnik o prevzemu blaga, dokazilo o plačilu, kopija pogodbe, obračun amortizacije.

#### **4.7.8 Manjše investicije**

V to kategorijo spadajo manjše investicije, ki so pomembne in potrebne za izvedbo projekta na transnacionalni ravni kot npr. obnova, preureditev ali saniranje že obstoječe infrastrukture, postavitve informacijskih točk oz. centrov, tematskih turističnih poti, točk za prodajo vstopnic. Pri naročilu del je treba upoštevati zakonodajo s področja javnih naročil.

*Dokazila:*

- originalni račun oz. potrjena situacija, zapisnik o prevzemu, dokazilo o plačilu, kopija pogodbe.

#### **4.7.9. Drugo**

V postavko se vključi vse stroške, ki jih ni mogoče vključiti v nobeno od navedenih kategorij stroškov. Vse stroške navedene pod to kategorijo je treba ustrezno opredeliti in dokazati z ustreznimi računi in dokazili o plačilu.

- Stroški DDV so upravičeni, če jih dejansko in dokončno plača projektni partner. V primeru uveljavitve odbitka vstopnega DDV se ta ne upošteva kot upravičen strošek.
- Stroški finančnih zavarovanj (bančnih garancij in drugo) so upravičen strošek, če so zahtevani s predpisi Komisije ali nacionalnimi predpisi.

- Stroški finančnih transakcij v tujini in stroški odprtja novih računov so upravičen strošek. Pravna pomoč, notarske storitve, stroški tehničnih in finančnih strokovnjakov, računovodske storitve, revizorske storitve so upravičen strošek, če so neposredno povezani in potrebni za izvajanje projekta.
- Negativne obresti, izgube, globe, penali in pravdni stroški niso upravičen strošek.

*Dokazila:*

- originalni račun, dokazilo o plačilu in drugo.

V kolikor je projekt sprejet v sofinanciranje, je treba z računovodskega stališča poskrbeti za določene stvari.

Izhodišče pri knjigovodskem vodenju tovrstnih projektov je samostojno stroškovno mesto, ki omogoča pregled podatkov in dokumentov (računi izdatkov, plačilni listi zaposlenih, pogodbe, fakture...), da so jasno ločeni od drugih poslovnih dogodkov prijavitelja.

Za potrebe opravljanja nadzora so vsi udeleženci v izvajanju programa dolžni oblikovati in hraniti ustrezne podatkovne in dokumentarne revizijske sledi svojih dejavnosti.

Prijavitelj mora zagotoviti možnost temeljitega pregleda za celoten projekt, tako zase kot tudi za partnerje. V ta namen mora hraniti ustrezen podatkovni in dokumentarni arhiv, iz katerega bo mogoča popolna rekonstrukcija posameznih poslovnih dogodkov, ki so bili osnova za oblikovanje zahtevka za izplačilo. Tak arhiv mora biti dostopen nadzornim organom, prijavitelj pa jim mora pri tem nuditi vso administrativno podporo in ustrezen prostor.

Podatkovni in dokumentarni arhiv zagotavlja ustrezno revizijsko sled, če omogoča naknadno in popolno:

- Dokumentarno in podatkovno rekonstrukcijo poslovnega dogodka in
- Utemeljuje zahteve za plačila z dokazili o posamičnih izdatkih (prejeti računi in izvedena plačila), ki so podprti z dokaznimi dokumenti, na podlagi katerih so bili izdani računi.

Dolžina hranjenja dokumentacije je razvida iz posamičnega razpisa.

#### **4.8 Priprava projektne dokumentacije za prijavo na mednarodni razpis**

Priprava dokumentacije za prijavo na nek razpis pomeni nadaljevanje zgodbe, ko je projektni osnutek skupaj z razdelanim finančnim in akcijskim planom končan. Izpolnjevanje prijavnih obrazcev različnih programov predstavlja poglobljeno delo, vezano na specifični tehnično-administrativni jezik evropske komisije.

## **5 PRIMER PRIPRAVE PROJEKTNE DOKUMENTACIJE ZA PRIJAVO NA RAZPIS PHARE<sup>11</sup>**

V tej točki je zaradi obsežnosti predstavljen zgolj Osnutek projekta (Concept Note Format). Celotna prijava in s tem primer priprave projektne dokumentacije za prijavo na razpis programa Phare se nahaja v Prilogi 3.

Vsak program ima določene zahteve glede oblike, vsebine in izgleda prijave. Tako je v tej točki prišlo do navzkrižja navodil priprave diplomskega dela in priprave projektne dokumentacije za prijavo na razpis.

V želji po čimbolj natančni predstavitvi primera prijave na razpis in razlogom, da je projekt, ki ni pripravljen po zahtevah in navodilih prijave na razpis, zavrnjen že pri kontroli upravičenosti (Eligible check), je Priloga 3 napisana po pravilih programa razpisovalca. To pomeni, da je jezik, v katerem je besedilo napisano angleški, ravno tako pa so spremenjeni razmiki, velikost črk, pisava in oštevilčenje.

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<sup>11</sup> Vsi obrazci in navodila so del "Prijave na razpis" in so objavljeni za vsak razpis posebej na spletni strani programa Phare: [http://ec.europa.eu/enlargement/financial\\_assistance/phare/index\\_en.htm](http://ec.europa.eu/enlargement/financial_assistance/phare/index_en.htm).





**EUROPEAN COMMISSION**

PHARE 2005

Multi-beneficiary programme on "Small Projects Programme" in the Republic of Bulgaria,  
the Republic of Croatia and Romania

Grant Application Form

Open Call for Proposals

Budget line: 22 02 10

Deadline for receipt of applications: 20 July 2006

Name of applicant:	<b>"Project Coordinator"</b>
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Dossier No	
(for official use only)	

## CONCEPT NOTE FORMAT

### 1. Summary of the action

#### *1.1 Brief description of the proposed action*

**Project aim** is to bring effective and applicable knowledge about important European Union issues to Croatian local authorities and business sector. New, improved **polycentric non-formal education activities** on every-year, up-to-date and permanent basis would help **raise awareness of our target groups about European Union**. Through interactive and systematic educational training sessions for different Authorities and private sector the new approach will result with deeper understanding and acceptance of EU values and standards by helping them be more cooperative, motivated and prepared for the future enlargement. In addition, better understanding among different sectors is anticipated. Communication among various sectors and the EU, improved knowledge of the EU funds, taxes and financial management mean significant added value to all included regions and their inhabitants and could be used as a solid base for further cooperation and communication with the European Union.

National, Regional, Local Authorities, private sector and inhabitants are still not sufficiently informed and prepared for the EU. There is a lack of knowledge on: EU membership, understanding and acceptance of EU values and standards, external assistance - EU funds and taxes, flexible labor market, environment, etc. (most of them are important areas of the EU *acquis*).

**The action** will be implemented through three complementary phases. All three phases are important areas for any candidate country that prepares for European integration. **The first phase** includes analyses and critical evaluation of existing non-formal education system. **The second phase** includes development of the new non-formal education system which will be implemented through four sections. **First section** will train the actors on effective communication among each other and with the EU. Vertical communication inside public sector and horizontal communication between private and public sector is the base for their future cooperation. Communication skills, "Adaptation to changes – skills" and promotion of employability skills – in the new, flexible EU labor market are all important for meeting regulations and standards of the EU. **Second section** is focused on EU projects preparation and management, bringing knowledge in polycentric way to numerous communities on EU standard and how to apply for EU funds. Therefore, mechanisms and capacities of both regional and local institutions in Croatia and public and private sectors would be significantly improved. **Third section** deals with financial management of EU projects, how to prepare individuals and organizations for demanding financial processes and to learn and understand vocabulary. Principles will be presented and positive practices studied, so actors will have opportunity to adjust their ideas to EU requirements. **Fourth section** combine EU taxation policy (VAT) and what changes and adaptation Croatia may expect and has to meet in the

process of approaching the EU standards. Experience of Slovenian partners during 2005 enlargement process will be of great importance. One of the aims of this section is also to improve the knowledge about taxation and politics of EU countries and Croatia. The project will focus on the part of taxation – VAT, with special emphasis to the 6<sup>th</sup> VAT Directive that should be implemented in the Croatian VAT Act Law before accessing into the European Union. That part of the harmonization will be presented through our educational programme. The aim of the program will be informing about the principles of the 6<sup>th</sup> VAT Directive and presenting the implications on national law and day-to-day transactions. We will focus on problems in praxis that will arise after accessing into the European Union based on the experience from Slovenia. We will give practical advice in the terms of education for the taxpayers and on the other hand also for the tax and other public authorities. **The third phase** includes the implementation of pilot project trainings on national, regional and local level.

**The result** of the project will be motivated public and private sector - to cooperate with one another and with the EU; actors that are well informed and prepared for EU funding opportunities, know enough to deal with tax policy in the EU and have sufficient knowledge (clear picture) on the financial management of the project. All these areas of study are important parts of meeting EU standards. The project will reach the aim through advanced educational model, which could be used as a solid base for all the candidate countries to adopt the rules, regulations, standards and procedures of the EU, after the evaluation of existing non-formal educational programs. It will be a new interactive EU education approach for local governments and private sector that will help Croatia to bridge information gap, achieve better mutual knowledge, to have stronger awareness of the opportunities as well as the challenges of future accessions and enhancing public debate in Croatia on EU membership. And because of its analyses it will be a solid base for organising additional EU education system in Croatia.

## **2. Relevance:**

### ***2.1 How relevant is your proposal to the needs and constraints of the target country or region?***

Croatia has a status of the candidate country for the EU and it is in a period of preparing for this integration. Although preparations began, still a lot work is to do and a lot of essential adjustments need to be met in various fields of Croatian economy. There is a big information gap, lack of knowledge about EU enlargement processes in Croatia (opportunities, challenges) both in the public and private sector. There is no sufficient knowledge especially in the field of EU external assistance, EU funded project management, laws and tax system and no effective cooperation between public and private sector. Poor communication leads to lack of transparency of processes, no effective mutual understanding and dialogue. With this project strong, sustained dialogue between the involved actors and also between them and the European Union could be achieved. Relatively high unemployment rate (Croatia 19%, EU

8,8% in May 2006. – Sources: Eurostat, Croatian Bureau of Statistics) raises the importance to learn how to adopt to the flexible, open labour market after transition – there is a lack of educated employers understanding EU issues, both in public and private sector. With this programme and its polycentric approach the network of "knowledge" between these sectors and other inhabitants could be made.

## ***2.2 What are the problems to be resolved and the needs to be met?***

Various **problems** are to be resolved to certain degree in the project, including ***lack of knowledge*** on EU processes in Croatia among public and private sectors and inhabitants, EU enlargement processes (opportunities, challenges) and EU external assistance and EU funded project management. Furthermore, there is not sufficient knowledge on laws and tax system and ineffective cooperation between public and private sector, lack of planning and systematization in education and evaluation analyses, plus - educational system is mostly formal and centralized in large cities.

**The needs** to be met include educational programs for public and private sector in Croatia related to important EU areas: Communication – to promote dialog between sectors, Taxes - harmonisation, EU funds and financial management of the EU funded projects. In that way, target groups will increase their informational level on the important issues - for effective preparation for the EU membership. Increasing knowledge on mentioned issues and improving communication skills among sectors means more transparency, mutual understanding and better acceptance of EU values and standards.

## ***2.3 Who are the actors involved (final beneficiaries, target groups)?***

Target groups of this project are public and private sector (SME's). Final project result beneficiaries are Croatian Cities, Local Authorities, Regions (Counties), Ministries (National Authorities), as well as private sector, and through mechanism of local training process also Croatian inhabitants. The new programme will also be applicable in other candidate countries so we find them as final beneficiaries as well.

## ***2.4 What are the objectives and expected results?***

**Objective** of the action is to connect the information gap with social dialogue and mutual understanding in the field of issues important for Croatia as a candidate country and with this gain more transparency.

**The main objective** is to - bring effective and applicable knowledge about important European Union issues to project target groups: Croatian local authorities and business sector. New polycentric educational system that will be made "according to the needs" could also be used in all candidate countries preparing themselves to adopt the EU standards.

**The main expected results** will be: 1) Evaluated Non-formal educational system. 2) Designed new non-formal educational program which will contribute to better understanding, cooperation between Croatia and the member states, generally better adoption to EU standards and less resistance for the integration processes. 3) Involved actors that are: sufficiently informed, motivated for future enlargement because of constant up to date knowledge, especially in the field of: for EU funding opportunities, human resources, tax policy in the EU and financial management of the project.

### ***2.5 What is the added value of the action (what adds the action by reference to (central or local) government action and actions implemented by non state actors)?***

**Added value** is a new way of accommodating to the EU regulations, new approach to introducing the changes to the candidate countries through interaction between different sectors and in that way improving their understanding and cooperation. This programme would help the companies and public bodies to raise awareness in Croatia on European Integration and Enlargement process. It would enable them to **play real roles** on EU and to have interactive approach which will along with debates help them deeper understand all mentioned processes. The new, systematic and polycentric EU education activities among sectors will be a solid base for preparing for EU regulations in Croatia.

## **3. Methodology and Sustainability:**

### ***3.1 What are the main project activities?***

- **Evaluation and critical analyses** of the existing non-formal education system in Croatia and dissemination of the first phase results to both public and private sectors through brochures, mailing, website.
- **Development and design** of new non-formal educational system of **interactive trainings** with preparation of new edition of brochures about EU standards in the fields of Tax and Financial Legislation, important areas of the acquis, employability skills, European funds – project management – application and implementation of the projects .
- **Implementation of the project through four pilots:** training activities in public and business sector on national, regional, county and city level.

Along with these activities, **public debates** (with representatives of the companies, local governments and inhabitants), **evaluation of activities** and **on-line consulting for Taxes and Finances – FAQ** (EU funding, Taxes, human resources, Financial management) will be organised.

### ***3.2 Who will be your main implementing partners, what is the length of your relationship with them and how will they be involved in the project?***

Key implementing partners are two Croatian non-profit organizations, Lead partner (LP) and Project partner 1 (PP1). LP has seven-year intensive experience in project and organizational management trainings and technical assistance for civil society organizations, authorities and responsible corporations. PP1 is LP partner since established and it is non-profit organization dealing with inter-sectors cooperation. Furthermore, there are three leading consulting firms from Slovenia (Subcontractor 1) and Croatia (Subcontractor 2, Subcontractor 3) specialized in Taxes, Finances, Project management and Human resource management as subcontractors. There is strong cooperation among mentioned organizations and firms, particularly on corporate social responsibility issues and project and organizational management. Cooperation brings synergy through complementary expertise.

### **3.3 *How will the project achieve sustainability?***

The new model will be developed through identified needs and will try to meet them through constant improvement of knowledge about EU issues. With this project more quality, up-to-date (on every year bases) information and better dialogue between public and private sector will be achieved. Evaluations, analyses, education and cooperation between different regions/sectors means long-term and sustainable approach to the non-formal EU learning in Croatia, and also in other candidate countries. After 12-month duration, the project will continue its purpose.

### **3.4 *Will it have multiplier effects?***

This project has a cross-sectorial approach in Croatia and influences both business and public sectors and through them – wider public. It has also international approach – Slovenian (EU) and Croatian cooperation, as stated in Phare 2005 Guidelines: *‘Any future enlargement of the EU needs to be supported by a strong, deep and sustained dialogue between the societies of the candidate countries and in the EU member States, as well as with the EU institutions’*. Communication is both vertical (among people in public sector) and horizontal (public – private communication). Adopting the new procedures, regulations, standards and rules regarding the EU is the issue concerning all countries trying to join the EU. The project could also be a solid base for other candidate countries (particularly from Western Balkans) to gain knowledge and experience on their way to the EU.

## **4. Expertise and operational capacity:**

### **4.1 *What is the experience of your organisation in project management?***

LP was involved in some 22 projects with more than 3000 participants in last seven years that are more or less relevant to proposed action. Only selected projects from 2001 to 2006 are listed here. LP was subcontractor or implementing partner in some of these projects, and some were created, managed and fully implemented by LP:

- **Civil Initiatives in Croatian Transition (2000-2001)**, training and workshops for development of local capacities (NGOs, local authorities, SME) in Eastern Slavonia, City of Vinkovci in partnership with newly established local training and resource centre.
- **Training of Trainers for regional youth leaders (2001)**, Montenegro; helping young leaders from former Yugoslavia to develop training skills and methodologies for interactive learning.
- **Advocacy Training for Belarus NGO leaders (2002)**, Program financed by US State Department, implemented by Heartland Intl. and Chicago IL.
- **REACH (2000-2003)** Youth Leadership Development program (training in Summer Camp) based on Outward Bound School principles.
- **CD 'Cookbook' for NGOs, Multimedia Manual (2002-2003)** CD manual for NGO professionals, local authorities representatives and responsible corporate managers on theory of civil society, project and organizational management.
- **Learning for Action (2003)** Meeting and study tour for world-wide community leaders and social entrepreneurs on Croatian post-conflict development
- **EOL (2003-2004)** Education for Croatian islands communities (capacities building, assistance in project development and management)
- **Let's Decide Together (2002-2004)** capacity building of youth leaders from various Croatian regions, partner of European House, Zagreb
- **Support to the Pension Reform Strategy Development of Armenia (2006)** study tour for Government officials from Armenia, partner AED Armenia and Armenian government.

**4.2. *What is the experience of your organisation and your partner(s) of the issues to be addressed?***

LP was involved in two intensive training and consulting/TA programs during 2004-2006 for European funds applications. During May/June of 2004 LP staff was intensively trained on Project Cycle Management and Logical Framework principles for EU funds.

Afterwards, LP staff (as well as staff from PP1) performed PCM/Log Frame trainings for over 250 people from institutions of social services in intensive 5-day training sets. These trainings were part of **CARDS 2002**, Program for social services delivery by non-profit sector and managed by Ramboll Management. Furthermore during 2005/2006 LP and PP1 staff intensively trained some 200 people, professionals from vocational education training schools in cooperation with Croatian VET agency and Ministry of Finance. This training process was part of **CARDS 2003** Program for VET schools development. LP and PP1 were involved in technical assistance to various organizations during both CARDS programs. LP was also involved in two intensive training and consulting/TA programs during 2004-2006 for European funds applications. During May/June of 2004 LP staff was intensively trained on Project Cycle Management and Logical Framework principles for EU funds.

Afterwards, LP staff (as well as staff from PP1) performed PCM/Log Frame trainings for over 250 people from institutions of social services in intensive 5-day training sets. These trainings

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Within last two years LP started closely cooperate with several firms that became part of their training offer in certain specific fields such are upcoming change in taxation policies, financial services and human resources management. **Subcontractor 1** private company is Slovenian branch of global corporation - a world wide network of public accounting firms, **Subcontractor 2** private company is successful Croatian human resources development company with branch office in Belgrade and with clients ranging from major Croatian banks to the biggest Serbian corporate group. **Subcontractor 3** private company is an expert company dealing with the EU Funding on the field of Assistance in arranging basic data, Assistance in finding a suitable financial source, Assistance in filling in the necessary application documentation, Assistance in the project execution phase, Active execution of individual project sections and training.

## **6 SKLEP**

Tekmovanje za evropska sredstva oziroma sofinanciranje projektov iz raznih skladov in programov je postalo vedno bolj neusmiljeno. Na vsak razpis se prijavlja vedno večje število podjetij iz različnih evropskih držav, kar pomeni manjši odstotek sofinanciranih projektov na objavljene razpise.

V točki 3.4 (Slovenija in evropski projekti) so zapisana števila prejetih in odobrenih projektov. Odstotek sofinanciranih projektov je iz 37.5% (začetek programskega obdobja) padel na 17% (konec programskega obdobja).

Diplomsko delo opisuje potek priprave evropskega projekta od razvoja projektne ideje, iskanja ustreznega vira sofinanciranja, pisanja projektne osnutka, razvoja in koordinacije projektne partnerstva – iskanje, preverjanje in vzpodbujanje partnerjev za sodelovanje pri projektu, priprave logične matrice, priprave stroškovnega plana – ocenjevanje in priprava vseh upravičenih stroškov za nastanek projekta, razdelitve dela med posamezne projektne partnerje – kaj naj kdo dela, kdaj in zakaj, da bo projekt uspešno zaživel, priprave projektne dokumentacije za prijavo na mednarodni razpis – izpolnitev vseh potrebnih obrazcev, tabel in prilog ter zagotovitev kvalitete in neoporečnosti prijave in podatkov uporabljenih v prijavi.

V Sloveniji so se do sedaj na evropske razpise prijavljale predvsem občine, razne izobraževalne ustanove, raziskovalni inštituti itd. Sedaj pa po evropskem denarju segajo tudi manjša, hitro rastoča podjetja, ki za nadaljnji razvoj potrebujejo svež denar, ravno tako pa se na evropske razpise prijavljajo tudi večja podjetja, ki so zaradi počasnega razvoja in



premajhnega vlaganja v razvoj ostala za svojo konkurenco in sedaj iščejo načine, kako se svojim konkurentom približati ali jih celo preseči.

Skupno vsem slovenskim prijaviteljem projektov ali iskalcem evropskega denarja je, da večinoma nimajo ustreznega kadra za prijavo na razpis in za nadaljnji projektni management, zato je dobro, če podpišejo pogodbo o manageriranju njihovega projekta s kakšno svetovalno hišo, katere glavna naloga je administrativni, finančni in tehnični management. Strokovni management je večinoma naloga prijavitelja projekta. V kolikor prijavitelji projekta tega ne storijo in ne razpolagajo z ustrežno delovno silo, bodo izpadli že pri ocenjevanju projekta, saj so zahtevane ustrezne reference zaposlenih na projektu.

Management evropskih projektov je kombinacija administrativnega, finančnega in strokovnega vodenja projekta. Vsak izmed zgoraj naštetih delov manageriranja evropskih projektov je poglavje zase in vsak predstavlja zaključeno celoto. Ravno zaradi specifične vloge dela je nemogoče, da bi projekt managerirala ena sama oseba. Na začetnem sestanku (Kick-off meeting-u) je treba opredeliti kdo bo zadolžen za administrativni, kdo za finančni in kdo za strokovni del manageriranja evropskega projekta.

Poglavje 5 in Priloga 3 (Primer priprave projektne dokumentacije za prijavo na razpis Phare) služita kot kazalec vloženega dela, potrebnega za pripravo projekta in za prijavo na razpis. Istočasno kaže tudi koliko ter kakšne podatke moramo vpisovati v vnaprej pripravljene obrazce.

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## **PRILOGE**

# PRILOGA 1

## LETTER OF COMMITMENT

Project Partner (Acronym): **XXXXX**

I, the undersigned, representing *Company, Address, City, Country*

.....  
(complete name and address of the organisation)

in the capacity of *responsible person*

.....  
(this person must have the ability to legally bind the organisation)

hereby declare that:

- my organisation will participate as partner in the project entitled:

***NAME OF THE PROJECT***

***(Acronym:YYYY)***

.....  
submitted for co-financing ***NAME OF THE PROGRAMME*** ;

- the contribution of my organisation in the project will be the following (please describe briefly how the participation of your organisation in the project represents an added value in terms of activities carried out and results achieved):

- ***TASK No1***
- ***TASK No2***
- ***TASK No3***

- .....
- in case of approval of the project my organisation, as project partner, will provide

- ***Amount € (in figures)***
- ***Amount (in letters)***

shared in the project budget.

- my organisation will take the financial and professional responsibility of all stated funds.
- my organisation will be responsible for ***NAME OF THE PROGRAMME*** funds that the Lead Partner will transfer to it;
- in case of approval of the project, my organisation will sign a partnership agreement with the Lead Partner in order to define its participation and role as well as its rights and duties in the project;

I declare that the information given is true and correct.

.....  
*Signature*

.....  
*Date*

.....  
Clarification of signature

.....  
Function/title

.....  
.....  
.....

## PRILOGA 2

### ISKANJE POSLOVNIH PARTNERJEV<sup>12</sup>

#### *Mednarodna borza ponudb in povpraševanja*

Borza je oblika mednarodnih poslovnih priložnosti, **posebej namenjenih mikro, malim in srednje velikim podjetjem** na trgu Evropske unije, Centralne in Vzhodne Evrope ter v mediteranskih državah.

#### *Mednarodne borze ponudb in povpraševanja Gospodarske zbornice Slovenije (GZS)*

Borza ponudb in povpraševanja na portalu GZS ([www.gzs.si/borza/iskanje.htm](http://www.gzs.si/borza/iskanje.htm)) omogoča:

- **iskanje** med že obstoječimi ponudbami in povpraševanji,
- **uparjanje** ustreznih ponudb in povpraševanj (matching),
- **naročila na e-novice**,
- **vnos** novih ponudb in povpraševanj,
- **objave** v Sloveniji in tujini,
- **povezave** na sorodne spletne strani.

#### *Virtualna tržnica*

Istanbulski Euro info Center je pripravil **virtualno tržnico**, na kateri so zbrane informacije o Evropi, Evropski uniji, mreži EIC ter evropskih podjetjih.

Na tej virtualni tržnici se lahko podjetja promovirajo s pomočjo:

- svojega logotipa,
- predstavitev profila podjetja (prostor, ki vsebuje podrobnosti o podjetju),
- ključnih besed, povezanih s podjetjem in proizvodi oziroma storitvami,
- predstavitev proizvodov (predstavljen mora biti vsaj en proizvod),
- 25 fotografij proizvodov,
- dodatnih datotek do skupne velikosti 10MB za online kataloge, PowerPoint predstavitev).

Dosegljiva je na [www.eicfair.com](http://www.eicfair.com) ter [www.virtualfair.com](http://www.virtualfair.com)

#### *Drugi koristni naslovi za iskanje primernih partnerjev,*

- Portal Evropske unije ([www.europa.eu.int/index\\_sl.htm](http://www.europa.eu.int/index_sl.htm));
- Direktorat za podjetništvo in industrijo ([www.europa.eu.int/comm/dgs/enterprise/index\\_en.htm](http://www.europa.eu.int/comm/dgs/enterprise/index_en.htm));

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<sup>12</sup> Vir: Pridobitev nepovratnih sredstev iz strukturnih skladov EU, 2006.

- Eurostat ([www.europa.eu.int/comm/eurostat](http://www.europa.eu.int/comm/eurostat));
- Cordis (<http://cordis.europa.eu.int/en/home.html>);
- Market Accessstrukturnih skladov (<http://mkaccdb.eu.int/mkaccdb2/indexPubli.htm>);
- UNEC Europe (<http://www.unece.org/>).

**PRILOGA 3**



**EUROPEAN COMMISSION**

PHARE 2005

Multi-beneficiary programme on "Small Projects Programme" in the Republic of Bulgaria,  
the Republic of Croatia and Romania

Grant Application Form

Open Call for Proposals

Budget line: 22 02 10

Deadline for receipt of applications: 20 July 2006

Name of applicant:	<b>"Project Coordinator"</b>
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Dossier No	
(for official use only)	



## **NOTICE**

All personal data (such as names, addresses, CVs, etc.) mentioned in your application form will be processed in accordance with Regulation (EC) No 45/2001 of the European Parliament and of the Council of 18 December 2000 on the protection of individuals with regard to the processing of personal data by the Community institutions and bodies and on the free movement of such data. Your replies to the questions in this form are necessary in order to assess your grant application and they will be processed solely for that purpose by the department responsible for the Community grant programme concerned. On request, you may be sent personal data and correct or complete them. For any question relating to these data, please contact the Commission department to which the form must be returned. Beneficiaries may lodge a complaint against the processing of their personal data with the European Data Protection Supervisor at any time (Official Journal L 8, 12.1.2001).

Please read and complete this form with all due care, in accordance with the guidelines for applicants.

Please note that the procedure has changed. The evaluation of your application will only be performed if your concept note is provisionally selected. Your application will then undergo the evaluation. The eligibility conformity check will only be performed for the proposals that have been provisionally selected according to the score obtained after the evaluation, on the basis of the supporting documents requested by the EC and the Declaration by the applicant signed and sent together with the application.

## ***FULL APPLICATION FORM***

### **1. DESCRIPTION**

#### **1.1 Title**

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**POLYCENTRIC EDUCATION SYSTEM – PES**  
**(Interdisciplinary Polycentric EU Informative Non-Formal Education System)**

#### **1.2 Location(s) Country(ies), region(s), town(s)**

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- **Croatia – the state level,**
- **Croatian regions (counties),**
- **Croatian local communities,**
- **Croatian cities.**

#### **1.3 Cost of the action and amount requested from the EC**

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Total eligible cost of the action	Amount requested from the EC	% of total eligible cost of action
<b>55.642,00 EUR</b>	<b>44.513,60 EUR</b>	<b>80%</b>

NB: The % of total eligible cost of the action is calculated by dividing the Amount requested from the EC by the Total eligible costs of the action and multiplying by 100.

Please note that the cost of the action and the contribution requested from the EC have to be expressed in EURO.

#### **1.4 Summary**

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Maximum 1 page<sup>13</sup>

Duration of the action	Months 12
Objectives of the action	<b>Overall objective(s)</b> <b>Adopting to the new procedures, regulations, standards and rules regarding the EU – through the new educative approach that is made "according to the needs" concerning Croatia - to gain knowledge and experience on their way to the EU. Interactive</b>

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<sup>13</sup> The number of pages mentioned are maxima, and can be reduced where the grants to be awarded are of low amount.  
NB : some of the footnotes are purely explanatory and will not be reproduced into the application forms.

	<p>trainings together with effective cooperation between public and private sector bring synergy through their complementary expertises.</p> <p><b>Specific objective</b></p> <p><b>To motivate cooperative private and public sector</b> to be well informed and prepared to entering the European Union through the interdisciplinary training process which will help to prepare Croatian public and private sector for the EU funded opportunities, knowledge how to deal with <b>tax – VAT policy in the EU</b> and have sufficient knowledge on the <b>preparation and management (especially financial) of the EU funded project</b>. All these areas of study are important parts of meeting EU standards. The project will reach the aim through advanced educational model, which could be used as a solid base for all the candidate countries to adopt the rules, regulations, standards and procedures of the EU.</p>
Partner(s)	PP1 - NON PROFIT ASSOCIATION, Croatia
Target group(s) <sup>14</sup>	<ul style="list-style-type: none"> <li>- Public sector: National, Regional (County) and City Authorities</li> <li>- Private sector (SME's) – involved business sector</li> </ul>
Final beneficiaries <sup>15</sup>	<ul style="list-style-type: none"> <li>- Croatian public and private sector and through them – all the Croatian inhabitants</li> <li>-Potentially another “west Balkan” candidate countries</li> </ul>
Estimated results	<ul style="list-style-type: none"> <li>- Evaluated Non-formal educational system</li> <li>- Designed New non-formal educational program which will contribute to better understanding, better cooperation between Croatia and the member states, less resistance for the integration processes, generally better adoption to EU standards and social dialogue between different sectors of Croatian economy and with the member states, all in order to be well prepared when entering the EU</li> <li>- Involved actors that are: sufficiently informed, motivated for future enlargement because of constant up to date knowledge, especially in the field of: EU funding opportunities, human resources, tax policy in the EU and financial management of the project.</li> </ul>

<sup>14</sup> “Target groups” are the groups/entities who will be directly positively affected by the project at the Project Purpose level

<sup>15</sup> “Final beneficiaries” are those who will benefit from the project in the long term at the level of the society or sector at large

Main activities	<ul style="list-style-type: none"> <li>- Analyses and critical evaluation of existing non-formal education system in Croatia</li> <li>- Development of new EU non-formal education system</li> <li>- Implementation of the project through four pilots: training activities in public and business sector on national, regional, county and city level</li> </ul>
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Where applicable, clearly indicate the sector, theme, or geographical area specified in the call for proposals to which the proposed action would apply:

## 1.5 Objectives

*Maximum 1 page. Describe the overall objective(s) to which the action aims to contribute towards and the specific objective that the action aims to achieve.*

**The main goal** of the project **Polycentric Education System – PES** is to bring effective and applicable knowledge about important European Union issues to Croatian public and private sector (from national to local authorities, SME and specific private initiative). It will be made through new, "according to the needs" polycentric educational system which could also be used in all candidate countries preparing themselves to adopt the EU standards, especially in the field of: Tax system, Finances, Project management and Human resources.

**The main expected result** will be sufficiently informed, motivated, more cooperative public and private sector which will be well prepared for the EU through constant and polycentric education activities. With this project much better understanding among different sectors will be made. Better communication among these sectors and the EU, improved knowledge of the EU funds, taxes, financial management etc. means big added value to all included regions and their inhabitants and is a solid base for further cooperation and communication with the European Union.

**Interactive trainings** together with effective cooperation between public and private sector bring together synergies through their complementary expertises. Participants will gain knowledge from trainers professional experience through real case studies, role playing and working on virtual projects. They will be involved in practical project development, coordination, writing project draft, logical framework, deciding about budget, learning about tax system, etc. Improving knowledge and constant polycentric education about areas of this project (EU funding opportunities, Tax policy in the EU and Financial management of the project) means big added value in meeting EU standards and raising awareness about EU in Croatia. The project will reach the aim through advanced educational model, which could be used as a solid base for all the candidate countries to adopt the rules, regulations, standards and procedures of the EU.

This project will create the added value to several different EU standards among Croatian public bodies, associations and top management (of the selected SME's) and through them

also - all the other inhabitants - not as a "one time workshops" but as sustainable EU activities – on the "every year - up to date - bases". Most of the now offered EU non formal educations are offered as temporary activities – different time in different places in Croatia, more centred than planned (like it should be through polycentric and systematic activities).

Local governments, private sector and inhabitants are still not sufficiently informed and prepared for the European Union. There is a lack of knowledge on: **EU membership, understanding and acceptance of EU values and standards, external assistance - EU funds and taxes, flexible labour market, environment, etc.** Qualitative and deep understanding of mentioned areas brings better understanding, better cooperation between Croatia and the member states, less resistance for the integration processes, generally better adoption to EU standards and social dialog between different sectors of Croatian economy and with the member states, all in order to be well prepared when entering the EU.

## 1.6 Justification

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*Maximum 3 pages. Please provide the following information:*

### *1.6.1 Relevance of the action to the objectives and priorities of the programme*

In order to achieve objectives and priorities of the programme the project will be implemented through three complementary phases. The first phase will be "Evaluation - existing non formal education system analyses and critical evaluation". In the second phase the new non-formal Education system will be developed – interactive, polycentric EU education activities, with positive impact on different developing Croatian sectors on national, regional (county), local and city level and in the third phase which will combine the new approach of the educational training non-formal system will be implemented, as we already mentioned, on national, regional (county) and city level. **Because of its analyses in the first phase the project will be a solid base for organising additional EU education system in Croatia and the other candidate countries too.**

Four sections of interactive trainings will be applied on selected places all over the Croatia. The project will perform the polycentric approach to the national, regional (county), local, city authorities and the private sector - and through them, to all the Croatian inhabitants too. **The first section** will train the actors how to communicate productively and effectively among each other and with the European Union. (Vertical communication inside public sector and horizontal communication among the private and public sector is the base for better transparency between them and for their future cooperation). **The second section** is dealing with the management of the EU projects, through interactive trainings - it will bring the knowledge about EU standards and applying for the EU funds. **The third section** is dealing with financial management of the EU projects and **the fourth section** is adopting the taxation policy from the EU to Croatia. All four of them are important areas for a Candidate country that is not yet enough prepared for its European integration. Adopting the new procedures, regulations, standards and rules regarding the EU – through the approach that is made

"according to the needs" - is the issue concerning all candidate countries to gain knowledge and experience on their way to the EU. Interactive trainings together with effective cooperation between public and private sector bring synergy through their complementary expertises.

### ***1.6.2 Identification of perceived needs and constraints in the target country/ies, in particular in the region(s) concerned.***

Croatia has a status of the candidate country for the EU and it is in a period of preparing for this integration. Although preparations began, still a lot of work has to be done and a lot of essential adjustments need to be met in various fields of Croatian economy, especially in taxation, social dialogue between private and public sectors, adoption of EU values and standards in priority sectors, use of EU funds, etc. Relatively high unemployment rate (Croatia 19%, EU 8,8% in May 2006. – Sources: Eurostat, Croatian Bureau of Statistics) raises the importance to learn how to adopt to the flexible, open labour market after transition – there is a lack of employability skills that can cope with EU standards (both from the aspect of the public and from the aspect of private sector and from the aspect of their cooperation); a lot of priority sectors whose good projects could be applicable for the EU pre-accession programmes – do not have effective information about how to apply for funds and how to coordinate the project partners and the project activities. Furthermore, there is an information gap on EU legislative, law, taxes etc. Also, there is a lack of educated employers understanding EU issues, both in public and private sector. With this programme the network of "knowledge" between these sectors and other inhabitants could be made.

Lack of knowledge in these areas could mean bad performance of the country and indirectly in that way for the European Union too. With additional interactive and innovative EU non formal education activities and management of the education activities more transparency is going to be achieved more knowledge, understanding and potentially more acceptance of EU processes in Croatian areas. Educating the public sector and then the private sector about vital EU means encouraging people to use opportunities and be aware of negative impacts too. The civil society dialogue is a long-term process. With this project it will be possible to achieve a long term quality base for the EU informative non-formal education system – "same time – different places" – education and then the dialog among involved sectors. It will have good impact to the equal opportunities in education system - through sustainable education system development in different places in Croatia.

One of the major needs of the involved Candidate country is to adjust its legislation, policy, standards to those in European Union. Education model which will be developed in this project could be used as a solid base for organising Educational program also in other Candidate countries, which will show interest in such a program. Summarised, the project will try to resolve the Croatian needs for:

- Effective communication, "adopting to changes" skills in relations public-private sector and the EU- communication important for meeting regulations and EU

standards;

- EU projects preparation and management, EU funding;
- Financial management of the EU projects and
- Adoption to EU taxation policy, especially from the VAT perspective.

### ***1.6.3 Description of the target group(s) and final beneficiaries and estimated number***

- The Final project target groups and also the result beneficiaries are Croatian public sector – Ministries, Regions (Counties), Local Authorities and Cities as well as Croatian private sector (SME) and through mechanism of local training process also all the Croatian inhabitants.

### ***1.6.4 Reasons for the selection of the target group(s) and identification of their needs and constraints. How does the Action contribute to the needs of the target group(s) and final beneficiaries?***

- There is a big information gap and lack of knowledge about EU enlargement processes in Croatia (opportunities, challenges) in both, public and private sector, especially in the field of EU external assistance, EU funded project management, sufficient knowledge on laws and tax system and no effective cooperation between public and private sector, planning and systematization in education and evaluation analyses.
- Education system is mostly formal and centralized in large cities. There is also a poor communication between public and private sector which leads to lack of transparency of processes and no effective mutual understanding and dialogue. With this project strong, sustained dialogue between the involved actors and also between them and the European Union could be achieved.
- Communication between various Croatian sectors in and from them with the European Union administration is a solid base for further “European” cooperation and Croatian approaching to the European Integration. With the improved knowledge of the EU means, significant added value to all included target groups and beneficiaries will be performed.
- Cross-sectoral cooperation will bring multiplying effects to the knowledge about mentioned areas and because of its interactive and systematic educational training sessions it will raise awareness in Croatia on European Integration and the Enlargement process on a new, effective, polycentric way. That will result with better acceptance of EU values and standards, by helping them be: more cooperative, motivated and prepared for the future enlargement.
- So, with project results we would like to motivate public and private sector to work together in cooperative way and together with the EU. Actors that are well informed and prepared for EU funding opportunities know enough to deal with tax policy in the EU and have sufficient knowledge (clear picture) on the financial management of the project. All these areas of study are important parts of meeting EU standards.

- **This kind of project is essential for candidate countries to adopt the rules, regulations, standards and procedures of the EU on the effective way, after the evaluation of existing non-formal educational programs.**

## **1.7 Detailed description of activities**

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Maximum 9 pages. Include the title and a detailed description of each activity to be undertaken to produce the results, justifying the choice of the activities and specifying where applicable the role of each partner (or associates or subcontractors) in the activities. In this respect, the detailed description of activities must not repeat the action plan (see section 1.9).

### **PREPARATORY ACTIVITIES:**

1. Developing a project idea–definition of Educational programme and content of the programme
2. Writing a Project draft
3. Developing Logical framework
4. Developing and coordination of project partnership
5. Development of the Budget plan
6. Assignment of activities to each Project Partner
7. Preparation of the project application
8. Coordination of activities between subcontractors
9. Educational technical supplies purchase

### **MAIN ACTIVITIES:**

#### **I PHASE:**

**Analyses of the Existing non formal EU education system** – it will contain the critical analyses offered in the field of present and existing non - formal education system in Croatia from the aspect of: time, place, sustainability, structure of audience and methods used.

#### **Analyses of an existing EU non-formal education activities in the field of:**

- Effective communication in involved sectors (how often sectors had the opportunities to attend communication skills education, which methods are used, structure of audience and sustainability).
- "Adopting to changes" - skills in relations: public-private sector-European Union (are there any trainings of this kind, methods, who, when, where, structure, sustainability, etc.
- Communication as an important element for adopting regulations and EU standards (what kind of communication is used now from the aspect of public and private sector, methods used in existing education activities and sustainability).

Activities performed by: **LP, PP1, and Subcontractor 2**



**Analyses of the existing EU non - formal education activities in the field of:**

- EU projects preparation and management (how often the involved sectors had the opportunities to attend educations about preparation and management of the EU projects, number of workshops, structure, methods used and sustainability).
- EU funding, standards, procedures, coordination (how often the involved sectors had the opportunities to attend educations about applying for EU funds, what kind of educations are used, titles, subjects, which funds are presented, number of workshops, structure, methods used and sustainability)

Activities performed by: **LP, PP1, and Subcontractor 1**

**Analyses of the existing EU non - formal education activities in the field of:**

- Financial management of the EU projects (are there any existing opportunities of involved actors to attend financial management of the EU projects education. Lots of projects are rejected because of the bad "budget performances" due to lack of knowledge of this subject. Analyses will give the input for developing appropriate trainings for participants.

Activities performed by: **LP, PP1, and Subcontractor 3**

**Analyses of the existing EU non - formal education activities in the field of:**

- Adoption to EU taxation policy, especially from the VAT perspective (adoption to the EU standards in field of taxes brings new challenges to the Croatia as a candidate country - this analyses will explore existing education in relation to EU standards: time, when, where, who, methods used, sustainability. On that basis the new system will be developed, according to the needs of the involved actors).

Activities performed by: **LP, PP1, and Subcontractor 1**

**Evaluation of existing EU non formal educational system through selected indicators: Information and indicators from the previous activities will be evaluated and prepared for critical analyses.**

Activities performed by: **LP, PP1 and all subcontractors.**

**Critical analyses – base for the following development:** critical analyses of existing educations in selected fields will give base for the new non-formal education system which will be made according to the needs of the actors involved and with the aim of better preparation and adoption of EU standards.

Activities performed by all **subcontractors**

**Preparing the questioner for the selected bodies on the national, regional, local and city level.**

Activities performed by: **LP and PP1**

**II PHASE:**

**Development of the new non-formal education system implemented through four sections.** On the bases of the critical analyses of the first phase, the new system will be developed according to the real needs of involved sectors and will be implemented through four complementary sections.

**Effective communication training development.** Importance of effective communication on the public-private sector relations and its relations with EU (raising transparency, mutual understanding and employability skills).

- Interactive trainings based on case studies, role playing and Andragogic approach will be developed according to the needs of involved actors. Subcontractor 2 has sufficient expertise in the field of communication training activities. It is a consultant company who is specialised in business sector "soft skills" education. Their involvement in development of the trainings will bring added value to the developed educations in this field.

Activities performed by: **Subcontractor 2**

**EU projects - preparation and management, bringing knowledge to communities on EU standards and how to apply for EU funds from a-z.**

- On the basis of expertise of the applicant, partner and subcontractors the interactive approach to the EU foundation learning will be made. New developed model will include professional experience of the trainers through real case studies, role playing and working on virtual projects. Participants will be involved in practical project development, coordination, writing project draft, logical framework, deciding about budget, etc.

Activities performed by: **LP, PP1, and Subcontractor 3**

**Financial management of EU projects - how to prepare individuals and organizations for demanding financial processes and to learn and understand vocabulary.**

Lots of projects are rejected because of the bad "budget performances" due to lack of information and knowledge on Financial management. New developed trainings will be made as sustainable, according to the needs, polycentric and interactive activities. Educators (Subcontractor 1) that will train the participants have a lot of professional

experience on financial management of EU project and will bring also the real case studies from SLOVENIA, the member country.

Activities performed by: **LP, PP1, and Subcontractor 1**

**EU taxation policy, adaptation and meeting EU standards in the field of VAT, harmonisation, experience from Slovenia - member country.**

Education workshops will focus on problems in praxis that will arise after accessing into the European Union based on the experience from Slovenia.

Activities performed by: **LP, PP1, and Subcontractor 1**

### **III PHASE**

<b>Implementation of the project through 4 pilots:</b>
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***Pilot 1: Implementation of pilot project activities on national level***

- **Education - training activities in the field of: effective communication, "adopting to changes"-skills in relations public-private sector-European Union.** Lack of communication between actors in one country means less cooperation and less knowledge. That could also result with bad performance of the country in preparations for the EU. With developed education and trainings participants will gain knowledge on how to communicate between each other and work more efficiently. Effective communication among Public sector and Private sector is a base for social dialogue and cooperation on national level. Communication skills, "adopting to changes"- skills and through that promotion of employability skills – in the new, flexible EU labour market are important parts of meeting regulative and the standards of the European Union. With this pilot - better communication on national level will be achieved, leading to better transparency, mutual understanding and constant updating EU information system. Training activities on, "same time different places" approach and debates among different ministries, counties, regions, cities (cross-sector approach) will give a great added value to overall communication of all participants.

Activities performed by: **Subcontractor 2**

- **Education - training activities in the field of: EU projects preparation and management, EU Funding.** Participants will gain knowledge about efficient preparation of projects, how to search for appropriate programme, how to find suitable Project partners, how to divide work between partners, search for efficient subcontractors. Actors will be able also to meet all strategic and programme documents that are important parts of the EU policy on the national level. That will help them meet the requirements of the EU in applying their projects for the EU funds, project management, coordination, etc.

With this project national authorities will be able to achieve knowledge of EU funding challenges and opportunities from national point of view. After adoption of sufficient communication skills, the actors will learn through interactive workshops, case studies, role playing, fully completing application form and coordination projects on national level. Practicing social dialogue in Croatia through communication trainings and EU project management preparation is of great importance for a candidate country that is still in transition as it is Croatia.

Activities performed by: **LP, PP1 and Subcontractor 3**

- **Education - training activities in the field of: financial management of the EU projects.** This section of the first pilot is being prepared by Subcontractor 1. Participants will gain knowledge about efficient financial management of the EU projects. They will learn that all the partners and subcontractors have to agree about the size of work and necessity of Financial means for every individual work participation to the project (who works what, when and why), before they prepare the Budget for the Action. They will also learn that the base for creating the Budget for the Action is Call Guidelines – Applicant package, which has to be studied thoroughly, especially the chapter about eligible costs - what applies for eligible costs (detailed description) and what are not eligible costs, etc. Interactive workshops and the expertise of trainers will bring up to date, constant and improved knowledge of the financial management of the EU projects on national level.

Activities performed by: **Subcontractor 1**

- **Education - training activities in the field of: EU taxation policy, especially from the VAT Perspective.** On the lecture we will focus in the part of taxation on the VAT with special emphasis on the 6<sup>th</sup> VAT Directive that should be implemented in the Croatian VAT Act Law before accessing into the European Union. That part of the harmonization will be presented through our educational programme. All the participants will be informed about the principles of the 6<sup>th</sup> VAT Directive and presenting the implications on national law and day-to-day transactions. Education workshops will focus on problems in praxis that will arise after accessing into the European Union based on the experience from Slovenia, on national level. Experts from the field of VAT taxation (Subcontractor 1) will give practical advice in the terms of education for the taxpayers on one hand, and on the other hand also for the tax and other public authorities.

Activities performed by: **Subcontractor 1**

***Pilot 2: Implementation of pilot project activities on regional level***

- **Education - training activities in the field of: effective communication, "adopting to changes" -skills in relations: public-private sector–EU. Communication, important for meeting regulations and EU standards.** With this pilot - better communication

among regions will be achieved, leading to better transparency, mutual understanding and constant updating EU information system. Training activities on regional level, "same time different places" approach and debates among different ministries, counties, regions, cities (cross-sector approach) at the end of training sessions will be great added value to positive, productive and sustainable communication between different developed regions of Croatia (polycentric approach) and their communication with the EU.

Activities performed by: **Subcontractor 2**

- **Education - training activities in the field of: EU projects preparation and management, EU funding.** With this project regional authorities will be able to achieve knowledge of EU funding challenges and opportunities from regional point of view. After adoption of sufficient communication skills, the actors will learn about the subject through interactive workshops, case studies, role playing, fully completing application form and coordination projects on regional level. Practicing social dialogue in the region and among the regions in Croatia through communication trainings and EU project management preparation is of great importance for a candidate country that is still in transition as it is Croatia.

Activities performed by: **LP, PP1 and Subcontractor 3**

- **III. Education - training activities in the field of: financial management of the EU projects.** Participants will gain knowledge about efficient financial management of the EU projects from the experts in this area. They will learn that all the partners and subcontractors have to agree about the size of work and necessity of Financial means for every individual work participation to the project (who works, what, when and why) before they prepare the Budget for the Action. They will also learn what is the base for creating the Budget for the Action (Call Guidelines – Applicant package), how to study it thoroughly, importance of the chapter concerning eligible costs - what applies for eligible costs (detailed description) and what are not eligible costs, etc. Interactive workshops and the expertise of trainers will bring up to date, constant and improved knowledge of the financial management accommodated to the regional aspect of the EU projects.

Activities performed by: **Subcontractor 1**

- **Education - training activities in the field of: EU taxation policy, especially from the VAT perspective.** The trainings will focus on the part of taxation concerning VAT with special emphasis on the 6<sup>th</sup> VAT Directive that should be implemented in the Croatian VAT Act Law before accessing into the European Union. That part of the harmonization will be presented through our educational programme. All the participants will be informed about the principles of the 6<sup>th</sup> VAT Directive and presenting the implications on regional law and day-to-day transactions. Education workshops will focus on problems in praxis that will arise after accessing into the European Union based on the experience

from Slovenia regional level problems. Experts from the field of VAT taxation will give practical advice in the terms of education for the taxpayers on one hand, and on the other hand also for the tax and other public authorities.

Activities performed by: **Subcontractor 1**

***Pilot 3: Implementation of pilot project activities on county level***

- **Education - training activities in the field of: effective communication, "adopting to changes"- skills in relations: public-private sector- EU. Communication, important for meeting regulations and EU standards.** . With this pilot - better communication among counties will be achieved, leading to better transparency, mutual understanding and constant updating EU information system. Training activities on county level, "same time different places" approach and debates among different counties, regions, cities, ministries (cross-section approach) at the end of training sessions will be great added value to positive, productive and sustainable communication between different developed regions of Croatia (polycentric approach) and their communication with the EU.

Activities performed by: **Subcontractor 2**

- **Education - training activities in the field of: EU projects preparation and management, EU funding.** With this project county authorities will be able to achieve knowledge of EU funding challenges and opportunities from regional point of view. After adoption of sufficient communication skills, the actors will learn about the subject through interactive workshops, case studies, role playing, fully completing application form and coordination projects on county level. Practicing social dialogue between regions in Croatia through communication trainings and EU project management preparation is of great importance for a candidate country that is still in transition as it is Croatia.

Activities performed by: **LP, PP1 and Subcontractor 3**

- **Education - training activities in the field of: financial management of the EU projects.** Participants will gain knowledge about efficient financial management of the EU projects from the experts in this area. They will learn that all the partners and subcontractors have to agree about the size of work and necessity of Financial means for every individual work participation to the project (who works, what, when and why) before they prepare the Budget for the Action. They will also learn what is the base for creating the Budget for the Action (Call Guidelines – Applicant package), how to study it thoroughly, importance of the chapter concerning eligible costs - what applies for eligible costs (detailed description) and what are not eligible costs, etc. Interactive workshops and the expertise of trainers will bring up to date, constant and improved knowledge of the financial management from county aspect of the EU projects.

Activities performed by: **Subcontractor 1**

- **Training activities in the field of: EU taxation policy, especially from the VAT perspective.** The trainings will focus on the part of taxation concerning VAT with special emphasis on the 6<sup>th</sup> VAT Directive that should be implemented in the Croatian VAT Act Law before accessing into the European Union. That part of the harmonization will be presented through our educational programme. All the participants will be informed about the principles of the 6<sup>th</sup> VAT Directive and presenting the implications on county law and day-to-day transactions. Education workshops will focus on problems in praxis that will arise after accessing into the European Union based on the experience from Slovenia, on county level. Experts from the field of VAT taxation (Subcontractor 1) will give practical advice in the terms of education for the taxpayers on one hand, and on the other hand also for the tax and other public authorities considering the county point of view.

Activities performed by: **Subcontractor 1**

***Pilot 4: Implementation of pilot project activities on city level***

- **Education - training activities in the field of: effective communication, "adopting to changes"-skills in relations: public-private sector - EU. Communication important for meeting regulations and EU standards.** With this pilot - better communication among cities will be achieved, leading to better transparency, mutual understanding and constant updating EU information system. Training activities on city level, "same time different places" approach and debates among different cities, counties, regions, ministries (cross-sector approach) at the end of training sessions will be great added value to positive, productive and sustainable communication between different developed regions of Croatia (polycentric approach) and their communication with the EU.

Activities performed by: **Subcontractor 2**

- **Education - training activities in the field of: EU projects preparation and management, EU funding.** With this project city authorities will be able to achieve knowledge of EU funding challenges and opportunities from local point of view. After adopting sufficient communication skills, the actors will learn about the subject through interactive workshops, case studies, role playing, fully completing application form and coordination projects on city level. Practicing social dialogue in the city and among the cities in Croatia through communication trainings and EU project management preparation is of great importance for a candidate country that is still in transition as it is Croatia.

Activities performed by: **LP, PP1 and Subcontractor 3**

- **Education - training activities in the field of: financial management of the EU projects. This section of the fourth pilot is being prepared by Subcontractor 1.** Participants will gain knowledge about efficient financial management of the EU projects from the experts in this area. They will learn that all the partners and subcontractors have to agree about the size of work and necessity of Financial means for every individual work participation to the project (who works, what, when and why) before they prepare the Budget for the Action. They will also learn what is the base for creating the Budget for the Action (Call Guidelines – Applicant package), how to study it thoroughly, importance of the chapter concerning eligible costs - what applies for eligible costs (detailed description) and what are not eligible costs, etc. Interactive workshops and the expertise of trainers will bring up to date, constant and improved knowledge of the financial management from the city aspect of the EU projects.

Activities performed by: **Subcontractor 1**

- **Education - training activities in the field of: EU taxation policy, especially from the VAT perspective. This section of the fourth pilot is also being prepared by Subcontractor 1.** The trainings will focus on the part of taxation concerning VAT with special emphasis on the 6<sup>th</sup> VAT Directive that should be implemented in the Croatian VAT Act Law before accessing into the European Union. That part of the harmonization will be presented through our educational programme. All the participants will be informed about the principles of the 6<sup>th</sup> VAT Directive and presenting the implications on city law and day-to-day transactions. Education workshops will focus on problems in praxis that will arise after accessing into the European Union based on the experience from Slovenia, on city level. Experts from the field of VAT taxation will give practical advice in the terms of education for the taxpayers on one hand, and on the other hand also for the tax and other public authorities from the city point of view.

Activities performed by: **Subcontractor 1**

## **1.8 Methodology**

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*Maximum 4 pages. Detailed description of:*

### ***1.8.1 Methods of implementation and reasons for the proposed methodology***

**The project will provide a sustainable education solution on the selected and previous several time mentioned professional fields, important for Croatia in the process of meeting EU values and standards.** With its new polycentric education approach the involvement of actors from different sectors and levels are essential. The project will try to achieve a qualitative co-operation of the actors and new methodology for harmonisation of different professional areas in Candidate countries with EU standards. The PES project deals



with: communication training sessions, financial management of EU projects – workshops and practical trainings, it deals with preparing individuals and organizations for demanding financial processes and to learn and understand EU tax vocabulary. Principles will be presented and positive practices studied, so actors will have opportunity to adjust their ideas to EU requirements. Work with training participants will enhance interactive and constant up to date learning methodology – same one that will be passed through local training to other inhabitants.

**Developed learning model is based on creative mind processing**, connecting personal earlier experience or associations with the task they have to fulfil on the trainings. Strong interactive learning process influence on each participant's creativity development, team work abilities, communication skills, real involvement and immediate experience gaining already in class in the particular level. Every session will be organized in four following blocks:

1. **Human Resources:** Effective communication through "adopting to changes" skills in relations to public – private sector will be performed in the way of andragogic approach to education, interactive lectures, role playing will enable immediate learning and gaining experience already in classes ("in-class" experience). 60% of training sessions include practical work. Lectures will be adopted to the concrete areas that are of great importance to the target groups. Every group – different approach that is made according to their needs.
2. **EU funds–education:** Training activities in the field of EU projects preparation and EU projects management. Not only the Introduction to EU funding philosophy, but also detailed description on how to develop the EU funded project idea and how to design the project draft. The Introduction of now situation, news and future opportunities as well as the challenges will follow. Case studies (projects) will be performed. The interactive method of preparation the project idea, developing a project, establishing the national or international project partnership, filling in the application form (demo), applying with the project to the selected EU Program (some general rules) and coordination of the project will be also performed and presented in detail through workshops (team work). Whole these phases will be given to the participants through planned and systematic activities using: mind mapping, creative mind processing approach, connecting personal earlier experience or associations with the task they have to fulfil on the class, role playing etc.
3. **Financial management of EU projects:** Principles will be presented and positive practices studied, so actors will have opportunity to adjust their ideas to EU requirements. The new fresh training activities in the field of financial management of the EU projects will be performed (see the previous paragraph).
4. **EU taxation policy:** What changes and adaptation Croatia may expect and has to meet in the process of approaching the EU standards. Experience of Slovenian partners during 2005 enlargement process will be of great importance. One of the aims of this section is also to improve the knowledge about taxation and politics of EU countries and Croatia. The project will focus on the part of taxation – VAT, with special emphasis to the 6th VAT Directive that should be implemented in the Croatian VAT Act Law before

accessing into the European Union. Through the sessions, the practical advices in the terms of education for the taxpayers and on the other hand also for the tax and other public authorities will be given.

**Every session will last for two days.** Taxes and Human Resources will be held on the first day, second day it is going to be all about EU foundation – Project and Financial Management.

**Block's structure of the method:** About an hour and a half lecturing and than an hour of work in groups - workshops. Next 30 minutes is going to be assigned for presentation of their work. Debriefing is the central block's part when participants have opportunity to expose their group results and in mutual discussion, to compare and pull out the main conclusions. At the end of every block the participants will be given handouts and suggestion on relevant literature. Until the next session everyone is going to work on their imaginary projects and all the appearing questions will be answered through “FAQ” rubric on web.

During training session broad range of training techniques will be applied: role playing, team-work practice, mind – mapping, gaining knowledge through real examples (experience of experts involved: partner, subcontractors that are professionals in the included fields), interactive communication between different sectors, Power Point presentations etc.

Experts from the fields of: Human Resources, EU fund – education, Financial Management and Tax policy - will perform interactive training sessions also through debates after training period. The debates will include representatives on national, regional (county), city level and private sector will be also involved. Meeting together and debating on important EU questions concerning EU enlargement and Croatian opportunities and gaps are essential for the project implementation. In this way together with education, the stronger cooperation and dialogue between public and private sector will be possible. The education system will constantly have the positive impact also on “global” Croatian population.

The new, planned, systematic and polycentric and more "according to the needs" EU education model that includes different sectors will be a solid base for preparing of EU regulations in Croatia and adjustment to coming changes. Interactive trainings and debate with all sectors will bring more flexibility to the actors involved and certainly to their better communication and cooperation. This wholly approach to the EU information from the view of public sector and private sector will give a new dimension on this kind of education activities. With implementation through pilot example, the model will propose a new sustainable approach to the EU information

Communication trainings will bring more and improved social dialogue between different sectors, areas, regions in the country and with the European Union which leads to:

- better understanding between all involved sectors (horizontal and vertical approach)
- more transparency on Croatian public-private sector and

- EU relations and inhabitants who cope sufficiently with the EU challenges as well as opportunities.

**The essence of this project is in a new way of accommodation to the EU regulations, new way of introducing the changes to the Croatia (candidate countries), through interaction between different sectors and in that way improving their understanding and cooperation. This programme would help the companies, public bodies to raise awareness in Croatia on European Integration and Enlargement process. It would enable them to play real roles about EU and to have interactive approach which will help them deeper understanding of all mentioned processes.**

*1.8.2 Where the action is the prolongation of a previous action, explain how the action is intended to build on the results of this previous action*

*1.8.3 Where the action is part of a larger programme, explain how it fits or is coordinated with this programme. Please specify the potential synergies with other initiatives, in particular from the EC*

This projects shows sinergies with INTERREG IIIb Alpine space and Cadses Programme priorities and also with other different European initiatives like: general ERDF philosophy, EQUAL, Socrates II, eContent Plus, Media Plus, CARDS etc. The applicant (LP), its partner (PP1) and subcontractor 3 had successful experience in similar projects in the above mentioned programmes.

*1.8.4 Procedures for follow up and internal/external evaluation*

**After project conclusion** the trainings and sessions will continue with continuity till the end of the period of Croatian approaching to the EU family.

The list of Subcontractors shows that all important professionals who guarantee a sustainable development of described Education programme are involved in the project.

Each block's session will be finished with written evaluation as **important internal evaluation** instrument performed by the "auditorium". Evaluation will be completed with lecturer's report and with some photos from the session (as a document). It will be used for training and project team evaluation, to keep provided level of achieved results and to implement possible corrections if needed. In addition to internal evaluation, external independent project evaluation is planned to monitor project flow, give suggestion and run final evaluation (if necessary).

*1.8.5 Description of the role and participation in the action of the various actors (local partner, target groups, local authorities, etc.), and the reasons for which these roles have been assigned to them.*

**The main project implementing partners will be:**

1. Croatian association "LP" - as an applicant: LP will act as a lead organisation. It will be directly responsible for the preparation and management of the action with its partner and subcontractors. LP will manage and coordinate: preparatory activities, analyses of an existing non-formal education activities and development of new system of non formal education in the field of EU issues. LP has a years of experience in various educational projects, it was involved in some 22 projects with more then 3000 participants in last seven years that are more or less relevant to proposed action this project, mainly CARDS 2002 for social sector institutions support and CARDS 2003 for vocational education schools development. Please consult Page 27 for detailed list of LP projects.
  2. Croatian association "PP1" – as a project partner. PP1 was implementing partner in CARDS 2002 and CARDS 2003 programs for education of social sector delivery and VET schools development trainees. PP1 is small organization specialized for inter-sector cooperation and related education.
- **Several Consulting firms from Slovenia and Croatia, specialised in Taxes, Finances, Project management and Human resources management (all three of them are good partners, co-operators of the LP association) are acting as subcontractors.** Cooperation with mentioned companies showed as very effective. Unfortunately according to the Call guidelines actors from private sector are not eligible project partners and so it is decided that they will act within this proposal as subcontractors. Let us briefly present them:
    - **The first subcontractor** comes from Slovenia, who became EU member country two years ago and had to harmonise its politics with European Union standards. **Subcontractor 1** played a significant role in Slovenian harmonisation, because of its experts – that are one of the top experts in Taxation politics in Slovenia and member of world wide International web which covers almost all the world (they are acting in 106 countries). Long experience in the field of taxation and financial management helped them to adopt the rules and tricks of harmonisation and- they are well prepared to pass this knowledge to all the other Candidate countries. **Subcontractor 1** will held training sessions in two blocks out of four (Taxation and Financial management).
    - **Second subcontractor** - Croatian company for consultancy and EU foundation. It will cover training activities in the field of EU projects preparation and management, EU funding. Lecturers coming from this firm have an excellent references and experiences from EU foundations. Some of experiences are: preparation of the application form and managing the project FRESH-NETWORK-PARKS (Interreg IIIb Cadses), managing the

final Implementation of Slovenian project partners on the project IMONODE (INTERREG IIIB CADSES PROGRAMME), COAST, EST goes EAST, Concept for north Adriatic Sustainable Transport (INTERREG IIIB ALPINE SPACE PROGRAMME), preparing application form and project management of the project that gained EUREKA award etc.

- **The third subcontractor** is Croatian private company with an expertise in Human Resources Management, business advisory, business skills education and the project management. Main activities will be personal and organisational development training and consulting services, turn around consulting for corporate sector, and it has also successful experience in coordination and management of EU projects.

**Co-operation among the different institutions (governmental, regional and local authorities, public and private companies, city administrations etc.) will lead to an integrated network which will improve institutional settings internally and also at the interfaces to other institutions.**

**As this network will be permanent also after the project, the organisational structure will be a long term platform for knowledge transfer and decision making processes.**

*1.8.6 Team proposed for implementation of the action (by function: there is no need to include the names of individuals here)*

		Number of people
1.	Project managers	5
2.	Administrative / Financial Assistant	1
3.	Lecturers	8
<b>Total</b>	<b>14 project team members</b>	

**1.9 Duration and action plan**

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The duration of the action will be **12 months**.

*Note: The indicative action plan must not mention real dates, but must simply show "month 1", "month 2", etc. Applicants are recommended to leave a certain amount of slack in the timetable of their action plan as a precaution. The action plan should not include detailed descriptions of activities, but just their title (please ensure that these match the titles listed in section 1.7). Any months without activities must be included in the action plan and the duration of the action.*

The action plan for the first year of implementation should be sufficiently detailed to give an overview of the preparation and implementation of each activity. The action plan for each of the following years (depending on the action's duration) may be more general and should only list the main activities foreseen for those years. A more detailed action plan for each subsequent year will have to be submitted before receipt of new pre-financing payments, pursuant to Article 2(1) of the General Conditions of the grant contract (see Annex F to the Guidelines for applicants).

The action plan must be drawn up using the following format:

“The preparatory activities (the activities about the developing the project draft, establishing the project partnership, fulfilling the applicants package...) have been performed from May to July 2006. Those costs are not going under any project costs.”

<b>Year 1: 01.12.2006 – 30.11.2007</b>													
<b>Activity</b>	<b>Semester1</b>						<b>Semester 2</b>						<b>Implementing body</b>
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>	<b>11</b>	<b>12</b>	
<b>Preparation of the Project</b>													<b>LP, PP1, Subcontractors</b>
<b>PHASE I:</b>													
<b>Evaluation and analyses of an Existing non formal education system in the field of: effective communication, EU projects preparation and management, EU funding, financial management of the EU projects, adoption to EU taxation policy, etc.</b>													<b>LP, PP1, Subcontractors</b>
<b>Evaluation of existing non formal educational system through selected indicators</b>													<b>LP, PP1, Subcontractors</b>
<b>Critical analyses – base for the following development</b>													<b>LP, PP1, Subcontractors</b>
<b>Preparing the questioner for the selected bodies on the national, regional, local and city level.</b>													<b>LP, PP1, Subcontractors</b>

<b>PHASE II:</b> <b>Development of the new educational non formal system implemented through four sections:</b>													
<b>Effective communication among the involved actors.</b>													<b>LP, PP1, Subcontractors</b>
<b>EU projects - preparation and management</b>													<b>LP, PP1, Subcontractors</b>
<b>Financial management of EU projects</b>													<b>LP, PP1, Subcontractors</b>
<b>EU taxation policy</b>													<b>LP, PP1, Subcontractors</b>
<b>PHASE III:</b> <b>Implementation of the project through 4 pilots:</b>													
<b>Pilot 1: Implementation of pilot project activities on national level</b>													<b>LP, PP1, Subcontractors</b>
<b>Pilot 2: Implementation of pilot project activities on regional (County) level</b>													<b>LP, PP1, Subcontractors</b>
<b>Pilot 3:Implementation of pilot project activities on local level</b>													<b>LP, PP1, Subcontractors</b>
<b>Pilot 4: Implementation of pilot project activities on city level</b>													<b>LP, PP1, Subcontractors</b>

## 2. EXPECTED RESULTS

### 2.1 Expected impact on target groups/beneficiaries

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*Maximum 2 pages. Indicate how the action will improve:*

#### *2.1.1 The situation of target groups/beneficiaries*

The project itself is not designed as profit but will result with a lot of opportunities to the actors on the: national, regional, county, city level, and to the small and medium sized companies. Through them it could also positively affect all the inhabitants and other Candidate countries.

Croatia is still in period of transition, huge number of employees, both in public and private sector are still not prepared for flexible approach to the: EU issues, employability skills, and do not have sufficient knowledge about EU, Taxation, EU funded projects etc. that are important areas in adopting the EU standards. Through raising awareness of important fields of EU areas, together with the raising the quality of the different sector's communication - better transparency, flexibility and appropriate and successful EU education could be met.

One of direct impact/result of action would be bringing effective and applicable knowledge to the local authorities and business sector about important areas of the European Union and through that **raise awareness about European Union in Croatia** – using new and improved polycentric EU non formal education activities. "According to the needs planned and systematic approach" of this project will help Croatia to be sufficiently informed and to be better prepared when entering the European Union. Through interactive training sessions of local government and business sector it will result with deeper understanding and acceptance of the EU values and standards by local governments and business sector and make them much more cooperative, motivated and prepared for the future enlargement.

With this project much better understanding among different sectors will be made. Better communication among these sectors and the EU, improved knowledge of the EU funds, taxes, financial management etc. means big added value to all included regions and their inhabitants and is a solid base for further cooperation and communication with the European Union.

#### *2.1.2 The technical and management capacities of target groups and/or any partners where applicable.*

Chosen conglomeration of project partners with several high professional subcontractors (**Subcontractor 1** – Slovenia, **Subcontractor 2** – Croatia, **Subcontractor 3** – Croatia) will provide excellent professionally base for non-formal Education system. Partners already perform non-formal Education or training system in Croatia, covering different fields of expertise. Subcontractors which will provide lecturers for Education system are the best experts in their field of knowledge so all the participants of Interdisciplinary Polycentric EU Informative Non-Formal Education System will gain precious knowledge about EU founding and Finances, Taxation policy, Communication between different levels of vertical hierarchy in Candidate country and also between private and public sector in accordance to EU.

## **2.2 Concrete outputs**

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*Maximum 1 page. Be specific and quantify outputs as much as possible. Indicate notably foreseen publications.*

The main expected result is – constantly educated actors from private and public sector about areas that are important for Croatia and other candidate countries: the EU funds, taxes,



financial management, and communication skills. With this project much better understanding among different sectors will be made. Better communication among these sectors and the EU and also improved knowledge means big added value to all included regions and their inhabitants and is a solid base for further cooperation and communication with the European Union.

Main output of **Preparatory activities** is Application package.

Outputs from **Main activities** are:

**Phase I.:**

- Five reports of analyses of an existing Croatian non-formal education activities concerning the EU in the Action Plan defined fields
- Report of Evaluation of existing EU non-formal educational system through selected indicators.
- Report of Critical analyses which is the base for the following development.
- Returned and fulfilled questioner from the selected bodies on the national, regional, local and city level

**Phase II.:**

- Created textbooks (20-30 for each training), compact discs (20-30 for each training), brochures and leaflets containing the knowledge of the new non-formal education system (20-30 for each training), for all following sections:
  - Effective communication among the involved actors
  - EU projects - preparation
  - Financial management of EU projects
  - EU taxation policy

**Phase III.:**

- Implemented pilot project activities on:
  - National level (at least 1)
  - Regional level (at least 1)
  - County level (at least 1)
  - City level (at least 1)

Output of the project will be also **well motivated public and private sector** - to cooperate with one another and with the EU; actors that are well informed and prepared for EU funding opportunities, know enough to deal with tax policy in the EU and have sufficient knowledge (clear picture) on the financial management of the project. All these areas of study are important parts of meeting EU standards. The project will reach the aim through Education model, which could be used as a solid base for all the candidate countries to adopt the rules, regulations, standards and procedures of the EU. It will be a new interactive EU education

approach for local governments, private sector that will help CROATIA to bridge information gap, achieve better mutual knowledge, to have stronger awareness of the opportunities as well as the challenges of future accessions and enhancing public debate in Croatia on EU membership. And because of its analyses it will be a solid base for organising additional EU education system in Croatia

### **2.3 Multiplier effects**

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Maximum 1 page. Describe the possibilities for replication and extension of the action outcomes.

This project has a cross-sector approach in the country and so affects: business sector, public sector and through them all inhabitants. It has also international approach – Slovenian and Croatian cooperation. Communication is both: vertical (among people in public sector) and horizontal (public – private communication). Adopting the new procedures, regulations, standards and rules regarding the EU is the issue concerning all the countries, which are trying to become an EU member. This project can also be a solid base for other candidate countries for gaining knowledge and experience in their way of approaching the EU.

### **2.4 Sustainability**

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*Maximum 3 pages. Please distinguish between the following three dimensions of the sustainability:*

#### ***2.4.1 The financial aspect (how will activities be financed when the grant ends?)***

- Future non-formal Educational training in the field of Taxes, Human Resources, Project management and Financial management, covering national, regional, county and town level and through that all the inhabitants is very important for national administration, because it's work encourage all the inhabitants to accept the new rules, regulations, values and standards of the EU.
- To support all previously mentioned actions and especially when the participants are sent from the Public sector, the national budget is essential for the time after the grant ends.
- Working on local and town level gives us opportunities to finance our activity from the town budget, where the seminar will take place.
- All the participants of the training (from Private sector) will have to pay a fee for participating on the event.

#### ***2.4.2 Institutional level (Will structures allowing the activities to continue be in place at the end of the action? Will there be local "ownership" of action outcomes?)***

- **Final project result beneficiaries** are National Authorities, Regional Authorities, Local Authorities and through mechanism of local training also inhabitants of Candidate country.
- **Target group** of the project are all Candidate countries National Authorities, Regional Authorities, Local Authorities, Private Sector and all the inhabitants.
- Project partners with all subcontractors will own the methodology and also help to encourage all other Candidate countries to participate in suggested non-formal Education system.

*2.4.3 Policy level where applicable (What structural impact will the action have - e.g. will it lead to improved legislation, codes of conduct, methods, etc?)*

The project will lead to improved knowledge in important areas of meeting EU standards. Through sustainable, planned and systematic non – formal education system it will affect Public and Private sector and as a result we can foresee improvement of the legislation in Croatia. Through this model, harmonisation of Candidate countries policies with the EU policies is more applicable and transparent in different fields. Through several complementary pilots of new education non-formal system, EU standards will be much understandable and better accepted - so it will directly affect on improving Croatian legislation - because of better understanding of mentioned issues. And the new method of non formal education system could be used as a solid base for organising Education activities in all Candidate countries.

**Our partnership truly believe that - with this kind of planned project result the National Authorities, Local Authorities and even Private sector can improve and harmonise their policy with the one in EU through constant, planned, sustainable educations.**

### **3. BUDGET FOR THE ACTION**

Fill in Annex B (worksheet 1) to the Guidelines for applicants for the total duration of the action and for its first 12 months. For further information see the Guidelines for grant applicants (Section 2.1.4).

### **4. EXPECTED SOURCES OF FUNDING**

Fill in Annex B (worksheet 2) to the Guidelines for applicants to provide information on the expected sources of funding for the action.

Please note that there are two different sheets to be completed

#### In kind contributions

Please mention here below the contributions in kind provided by the applicant, his partners or another source (please specify), if any (maximum 1 page).

## II.

## THE APPLICANT

## 1. IDENTITY

<b>Full legal name :</b>	<b>LEAD PARTNER</b>
<b>Acronym :</b>	<b>LP</b>
Legal Entity Sheet number <sup>16</sup>	
<b>Nationality:</b>	<b>Croatian</b>
<b>Legal status</b>	<b>Not-for-Profit Organization</b>
<b>Official address:</b> <sup>17</sup>	<b>Address, Town, Country</b>
<b>Postal address:</b>	<b>Address, Town, Country</b>
<b>Telephone number:</b> Country code + city code + number	
<b>Fax number:</b> Country code + city code + number	
<b>E-mail of the Organisation:</b>	
<b>Website of the Organisation:</b>	
<b>Contact person for this action :</b>	<b>Project manager</b>
<b>Contact person's email address :</b>	

**Any change in the addresses, phone numbers, fax numbers and in particular e-mail, must be notified in writing to the EC. The EC will not be held responsible in case it cannot contact an applicant.**

<sup>16</sup> If the applicant has already signed a contract with the European Commission

<sup>17</sup> If not in one of the countries listed in section 2.1.1(1) of the Guidelines, please justify its location.

## 2. BANK DETAILS

Before the grant contract is signed, the applicants selected will have to supply a financial identification form using the model in Annex E to the Guidelines for applicants, certified by the bank where the payments are to be made.

## 3. DESCRIPTION OF APPLICANT

### 3.1 When was your organisation founded and when did it start its activities?

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LP was founded on DD/MM/YY and immediately started with planned activities.

### 3.2 What are the main activities of your organisation at present?

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1. Project activities towards enhancing capacities of NGOs for people with disabilities. It is permanent project with various activities such are trainings, technical assistance and consulting.
2. Intensive participation in working group SOKNO to introduce (and to Croatia's circumstances adjust) English quality assurance system PQASSO (Practical Quality Assurance System for Small Organizations). Project: Mentor's training for SOKNO implementation funded by USAID and recent training for new SOKNO mentors, was held under the lead of LP.
3. Work on various environmental protection programs and studies as consultants, technical assistants and trainers. It includes Local Green Agenda workshops, work on studies (for example Highway Corridor 5c in Bosnia-Herzegovina), and concept development for atmospheric greenhouse gases reduction programs (trainings, simulations).
4. International programs in which LP hosts various government and non-governmental groups from various countries (June this year LP hosted study tour for Armenian government's group on pension reform).
5. Establishment of long-term educational program with several institutions dealing with adult education on project and organizational management.

#### a. List of the management board / committee of your organisation

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Name	Profession	Nationality	Position	Years on the board
Mr. A	Trainer	Croatian	President	7
Mr. B	sociologist	Croatian	Executive director	7
Mrs. A	administrator	Croatian	Board member	5
Mrs. B	psychologist	Croatian	Board member	4

Name	Profession	Nationality	Position	Years on the board
Mrs. C	Mathematician	Croatian	Board member	4

#### 4. CAPACITY TO MANAGE AND IMPLEMENT ACTIONS

##### 4.1. Experience of similar actions

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Maximum 1 page per action. Please provide a detailed description of actions managed by your organisation over the past five years in the fields covered by this programme, taking care to identify for each action:

- i. the object and location of the action
- ii. the results of the action
- iii. your organisation's role (lead manager or partner) and its degree of involvement in the action
- iv. the cost of the action
- v. donors to the action (name, amount contributed)

**NOTE: LP was involved in some 22 projects with more than 3000 participants in last seven years that are more or less relevant to proposed action. Only selected projects are listed here.**

- i. The object and location of the action
  1. **TEHPO (2001)**, Technical assistance, training support and capacity building for local NGOs, University organizations, networks etc. LP held ca. 200 trainers' days.
  2. **Training of Trainers for regional youth leaders (2001)**, Montenegro; helping young leaders from former Yugoslavia to develop training skills and methodologies for interactive learning.
  3. **Advocacy Training for Belarus NGO leaders (2002)**, Program financed by US State Department, implemented by Heartland Intl., Chicago IL and LP
  4. **REACH (2000-2003)** Youth Leadership Development program (training in Summer Camp) based on Outward Bound School principles.
  5. **CD 'Cookbook' for NGOs, Multimedia Manual (2002-2003)** CD manual for NGO professionals, local authorities representatives and responsible corporate managers on theory of civil society, project and organizational management. Materials are mostly interactive compilation of AED/Odraz, USIA and UNDP materials.
  6. **Learning for Action (2003)** Meeting and study tour for world-wide community leaders and social entrepreneurs on Croatian post-conflict development

7. **EOL (2003-2004)** Education for Croatian islands communities (capacities building, assistance in project development and management)
8. **Let's Decide Together (2002-2004)** capacity building of youth leaders from various Croatian regions.
9. **CARDS 2002, Program for social services delivery by non-profit sector (2004)** Training on PCM/Log Frame project design for EU funds.
10. **CARDS 2003, Program for vocational education training schools development (2005)** Training on PCM/Log Frame project design for EU funds.
11. **Support to the Pension Reform Strategy Development of Armenia (2006)** study tour for Government officials from Armenia, partner AED Armenia

ii. The results of the action

1. Approximately 20 various organizations went through numerous trainings ranging from strategic planning, media relations, team building to project management and fund raising. Over 300 people joined program and developed their skills and knowledge.
2. Approximately 15 youth leaders went through intensive three-week training on training methodology basics and interactive learning.
3. Approximately 150 people were educated in Minsk, Belarus and 12 in Zagreb in advocacy and democratic developments
4. Approximately 60 youth, mostly from Croatia, but from Bosnia and USA as well went through intensive outdoor team building and project management trainings, youth exchange with organizations Children's Village and Global Kids, both from NY.
5. 2000 CDs produced, half of materials distributed throughout Croatia and the region.
6. Ten community leaders and social entrepreneurs from various countries went through one-week post-conflict development study tour.
7. Community leaders and NGO professionals educated in various subjects, several projects development assistance, needs assessment tools disseminated.
8. Approximately 100 youth leaders increased capacities to present their ideas and projects in media, to advocate for them and improve team work capabilities.
9. About 400 professional from various institutions and NGOs dealing with social care went through 5-day intensive training on Project Cycle Management.
10. About 200 professional from VET schools in Croatia went through 3-day intensive training on Project Cycle Management.
11. 17 government officials from Armenia went through 5-day study tour on Croatian pension reform.

iii. Your organisation's role (lead manager or partner) and its degree of involvement in the action

1. Lead implementing partner, high degree of involvement
2. Partner training organization
3. Key partner training organization
4. Co-leading organization, full involvement

5. Lead manager organization, full involvement
6. Co-leading organization, full involvement
7. Lead manager organization, full involvement
8. Key partner, full involvement
9. Implementing Training Partner
10. Partner training organization
11. Key partner, logistics, training for Croatian part, full involvement

iv. The cost of the action

1. 32.870 EUR
2. ca. 5.000 USD
3. ca. 50.000 USD
4. ca. 20.000 USD
5. 45.000 kn
6. ca. 12.000 USD
7. 74.500 kn
8. Approx. 100.000kn
9. ca. 600.000 EUR
10. undisclosed amount
11. 12.500 USD

v. Donors to the action (name, amount contributed)

1. Academy for Educational Development: 32.870 EUR
2. International company: 5.000 USD
3. International company: ca. 5.000.USD
4. International company: ca. 20.000 USD
5. International company: 45.000kn
6. International company: 2000 USD, various private donors and participants
7. International company: 74.500kn
8. International company: full amount
9. EU Commission, full amount
10. EU Commission, full amount
11. International company: 12.500 USD

This information will be used to assess whether you have sufficient and stable experience of managing actions in the same sector and of a comparable scale to the one for which you are requesting a grant.

## 4.2. Resources

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Maximum 3 pages. Please provide a detailed description of the various resources which your organisation has access to, and in particular, of the following:



4.1.1 Annual income over the last three years, mentioning where applicable for each year, the names of the main financial backers and the proportion of annual income each has contributed

<b>Year 2003</b>	<b>kn</b>	<b>%</b>
A	106.057,00	31,4
B	22.575,00	6,7
C	74.558,00	22,0
D	79.874,00	23,6
E	21.236,00	6,3
Other	33.884,00	10,0
<b>Total</b>	<b>338.184,00</b>	<b>100,00%</b>
<b>Year 2004</b>	<b>kn</b>	<b>%</b>
A	99.351,00	45,6
B	55.200,00	25,3
C	63.230,00	29,0
Other	335,00	0,1
<b>Total</b>	<b>218.116,00</b>	<b>100,00%</b>

<b>Year 2005</b>	<b>kn</b>	<b>%</b>
A	9.847,01	4,0
B	26.900,00	11,3
C	29.050,00	12,2
Other, incl. services	65.105,60	27,4
D	106.600,00	44,9
<b>Total, incl. In-kind</b>	<b>237.502,61</b>	<b>100%</b>

4.1.2 Financial data. Please provide the following information on the basis of the profit and loss account and balance sheet of your organization

Year	Turnover or equivalent	Net earnings or equivalent	Total balance sheet or budget	Shareholders' equity or equivalent	Medium and long-term debt	Short-term debt (< 1 year)
N-2005	130.903,00	-34.193,00	27.225,00	27.225,00		
In-kind	106.600,00		106.600,00	106.600,00		
N-1-2004	218.116,00	-23.845,00	82.288,00	82.228,00		
N-2-2003	338.184,00	-32.868,00	101.308,00	101.308,00		

Any guarantees granted by third parties: NONE

Any other factors demonstrating financial viability and any risks or uncertainties about implementation: NONE

4.1.3 The number of full-time and part-time staff by category (e.g. number of project managers, accountants, etc), indicating their place of employment

place of employment	engagement	Number
Executive director	Full time	1
Project manager/trainer	Full time	1
Accountant /administrative assistant	Honorarium part time	1

4.1.4 Equipment and offices

- Office,
- Furniture,
- Three sets of computers
- Photocopier,
- Digital Video camera and Photo camera
- Toyota SUV,
- Mobile training equipment (two laptops and LCD);
- Library.

- In addition, LP has on disposal full camping equipment and four double sea kayaks for outdoor small groups' team building and expeditions

4.1.5 Other relevant resources (e.g. volunteers, associated organisations, networks that might also contribute to implementation).

Volunteers: 1 civil servant (finished his duty, but still assists us on some youth programs)

Associates: 8 trainers – consultants, for various fields of expertise

Associated organizations:

- PP1
- Subcontractor 1
- Subcontractor 2
- Subcontractor 3
- A
- B
- C

This information will be used to assess whether you have sufficient resources to implement an action of the scale of the one for which you are requesting a grant.

### III. PARTNERS OF THE APPLICANT PARTICIPATING IN THE ACTION

#### 1. DESCRIPTION OF THE PARTNERS

This section must be completed **for each partner organisation** within the meaning of section 2.1.2 of the Guidelines for Applicants. Any associates as defined in the same section need not be mentioned. You must make as many copies of this table as necessary to create entries for more partners.

	Partner 1
Full legal name (business name)	PROJECT PARTNER 1
Nationality	Croatian
Legal status	Not-for-Profit Organisation
Official address	Official address
Contact person	Project manager
Telephone number	
Fax number	
E-mail address	
Number of employees	
Other relevant resources	
Experience of similar actions, in relation to role in the implementation of the proposed action	<p>PP1 – Until now we were concentrated on technical assistance and training delivery for different NGO's, in Project Cycle management, organizational development and inter-sectoral cooperation. The founders of organization are people with a long – time experience in non – profit sector, activists in human and women rights area as well as the very experienced trainers for non profit organisations.</p> <p>In last two years PP1 was participating in few projects. One of them is "Education for civil society" which is designed, fundraised and implemented by PP1; others are in partnership with other organisations.</p>

	<ul style="list-style-type: none"> <li>▪ CARDS 2002 program "Social service delivery by the non – profit organisations in social welfare, health protection and unformal education" – project proposal writing on EU standards.</li> <li>▪ "Education for civil society" – for secondary school pupils, supported by Ministry of science, education and sport.</li> </ul> <p>Trainings and consultation on Project Cycle Management, Strategic planning, Capacity building, organisational development, for different NGOs.</p>
History of cooperation with the applicant	We started with cooperation in 2005. Since then we have prepared and conducted a numbers of training and consultations on different issues such as strategic planning, PCM, Project proposal writing on EU standards. We designed several projects together and we have very close cooperation in number of our activities.
Role and involvement in preparing the proposed action	Partner, involvement in training preparation.
Role and involvement in implementing the proposed action	Partner, involvement in training delivery.

**Important:** This application form must be accompanied by a signed and dated partnership statement from every partner, in accordance with the model provided on the next page.

## 2. PARTNERSHIP STATEMENT

**Important:** This declaration must be provided by **each partner**.

A partnership is a relationship of substance between two or more organisations involving shared responsibilities in undertaking the action funded by the EC. To ensure that the action runs smoothly, the EC requires all partners to acknowledge this by agreeing to the principles of good partnership practice set out below.

1. All partners must have read the application form and understood what their role in the action will be before the application is submitted to the EC.
2. All partners must have read the standard grant contract and understood what their respective obligations under the contract will be if the grant is awarded. They authorise the lead applicant to sign the contract with the EC and represent them in all dealings with the EC in the context of the action's implementation.
3. The applicant must consult with his partners regularly and keep them fully informed of the progress of the action.
4. All partners must receive copies of the reports - narrative and financial - made to the EC.
5. Proposals for substantial changes to the action (e.g. activities, partners, etc.) should be agreed by the partners before being submitted to the EC. Where no such agreement can be reached, the applicant must indicate this when submitting changes for approval to the EC.
6. Where the Beneficiary does not have his headquarters in the country where the action is implemented, the partners must agree before the end of the action, on an equitable distribution of equipment, vehicles and supplies for the action purchased with the EU grant among local partners or the final beneficiaries of the action.

I have read and approved the contents of the proposal submitted to the EC. I undertake to comply with the principles of good partnership practice.

Name:	
Organisation:	
Position:	
Signature:	
Date and place:	

#### IV. CHECKLIST

### REF 2005-0011-0101 MULTI-BENEFICIARY PROGRAMME ON “SMALL PROJECTS PROGRAMME” IN THE REPUBLIC OF BULGARIA, THE REPUBLIC OF CROATIA AND ROMANIA TITLE

<b>ADMINISTRATIVE DATA</b>	To be filled in by the applicant
<b>Name of the Applicant</b>	Lead partner
<b>Nationality</b>	Croatian
Legal Entity Sheet number <sup>18</sup>	
<b>Legal status<sup>19</sup></b>	Not-for-Profit Organization
<b>Date of establishment of the organization</b>	YYYY
<b>Partner 1</b>	Name: PP1 Nationality: CROATIAN Legal status: NOT-FOR-PROFIT ORGANIZATION
<b>Partner n</b>	Name: Nationality: Legal status:

<sup>18</sup> If the applicant has already signed a contract with the European Commission

<sup>19</sup> E.g. non profit making, governmental body, international organisation...

<b>BEFORE SENDING YOUR PROPOSAL, PLEASE CHECK THAT EACH OF THE FOLLOWING COMPONENTS IS COMPLETE AND RESPECTS THE FOLLOWING CRITERIA :</b>	<b>To be filled in by the applicant</b>		<b>To be filled in by the EC</b>	
	<b>Yes</b>	<b>No</b>	<b>Yes</b>	<b>No</b>
<b>1. The correct grant application form, published for this call for proposals, has been used</b>	x			
<b>2. The proposal is typed and is in English</b>	x			
<b>3. One original and 3 copies are included</b>	x			
<b>4. A floppy disk or Cd-Rom is enclosed</b>	x			
<b>5. Each partner has completed and signed a partnership statement and the statements are included (if any). Please indicate “Not applicable” (NA) if you have no partner</b>	x			
<b>6. The budget is presented in the format requested, is expressed in € and is enclosed</b>	x			
<b>7. The duration of the action is equal to or lower than 12 months</b>	x			
<b>8. The requested contribution is equal to or higher than 40 000 EURO(the minimum allowed)</b>	x			
<b>9. The requested contribution is equal to or lower than 50 000 EURO (the maximum allowed)</b>	x			



## V. DECLARATION BY THE APPLICANT

<p><b>A. The applicant declares that:</b></p> <ul style="list-style-type: none"> <li>• It has the sources of financing and professional competence and qualifications specified in section 2.3 of the Guidelines for Applicants.</li> <li>• It undertakes to comply with the principles of good partnership practice foreseen in section III.2 of the grant application form.</li> <li>• It is directly responsible for the preparation and management of the action with its partners, and is not acting as an intermediary.</li> <li>• It and its partners do not fall in any of the categories (a) to (f) listed in section 2.1.1(2) of the Guidelines for Applicants.</li> <li>• If selected, it is in a position to deliver immediately, upon request, the supporting documents stipulated under point 2.4 of the Guidelines for Applicants</li> </ul>					
<b><u>Furthermore, the applicant declares that :</u></b>		<b>To be filled in by the applicant</b>		<b>To be filled in by the EC</b>	
		<b>Yes</b>	<b>No</b>	<b>Yes</b>	<b>No</b>
<b>1. Lead partner is eligible (in accordance with the criteria set out under point 2.1.2 of the guidelines.)</b>		x			
<b>2. Partner 1 is eligible (in accordance with the criteria set out under point 2.1.2 of the guidelines.)</b>		x			
<b>NB:</b> add as many rows as partners					

**VI.ASSESSMENT GRID  
(FOR THE USE OF THE EC ONLY)**

	<b>YES</b>	<b>NO</b>
1. The Deadline has been respected		
2. The Application form satisfies all the criteria mentioned in the Checklist (Section V of the Grant application form).		
The verification of the Checklist has been conducted by ..... On the .....		
<p><b><u>DECISION 1:</u> The Committee has decided to recommend the Concept Note for Evaluation after having passed the Administrative check.</b> (If not, reasons must be encoded in the Administrative check Grid in CRIS and in the Administrative Check report in CRIS).</p>		
<p><b><u>DECISION 2:</u> The Committee has approved the Concept Note and decided to proceed with the evaluation of the full proposal after having pre-selected the best Concept Notes.</b> (If not, reasons must be encoded in the Concept Note Evaluation Grid in CRIS – this includes the evaluation sheet for assessors and delegations, in the CNE report and in the letters sent out to applicants.)</p>		
<p><b><u>DECISION 3:</u> A. The Committee has recommended the proposal for Eligibility verification after having been provisionally selected within the top ranked scored proposals and within the available financial envelope.</b></p>		

(If not, reasons must be encoded in the Evaluation Grid in CRIS – this includes the evaluation sheet for experts and delegations, in the Evaluation report and in the letters sent out to applicants.)		
<b>B. The Committee has recommended the proposal for Eligibility verification after having been put in the reserve list should any provisionally selected proposal fail to fulfil the eligibility verification, according to the top ranked scored proposals and within the available financial envelope.</b> (If not, reasons must be encoded in the Evaluation Grid in CRIS – this includes the evaluation sheet for experts and delegations, in the Technical Evaluation report and in the letters sent out to applicants.)		
3. The supporting documents listed hereunder, submitted according to the Guidelines (Section 2.2.5), satisfy all the eligibility criteria of the applicant and its partner(s) (if any).		
<b>a. The applicant's statutes.</b>		
<b>b. The statutes or articles of association of <u>all partners</u> .</b>		
<b>c. The Legal Entity Sheet (see annex D) is duly completed and signed by the applicant and is accompanied by the justifying documents requested.<sup>20</sup></b>		
<b>d. A financial identification form conforming to the model attached at AnnexE.<sup>21</sup></b>		
<b>e Copy of the applicant's latest accounts.</b>		
The assessment of the eligibility has been conducted by .....On .....		
<b><u>DECISION 4:</u> The Committee has selected the proposal for funding after having verified its eligibility according to the criteria stipulated in the Guidelines.</b>		

<sup>20</sup> To be inserted only where the Contracting Authority is a body of the European Commission

<sup>21</sup> To be inserted only where the Contracting Authority is a body of the European Commission

(If not, reasons must be encoded in the Eligibility Verification Grid in CRIS, in the Eligibility Verification Report in CRIS and in the letters sent out to applicants.)		
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