



# BABYLON & ONTOLOGY

The European Educational Social Network

Babylon & ONtology: Multilingual and cognitive e-Learning Management System via PDA phone.  
Funding Programme: Lifelong Learning Programme 2007 - Multilateral project - Key Activity 3 - ICT.

**Funding Programme:** Lifelong Learning Programme 2007 - Multilateral project - Key Activity 3 - ICT.

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## Deliverable 2.1: State of the art in European project cycle management and relevant European Policies

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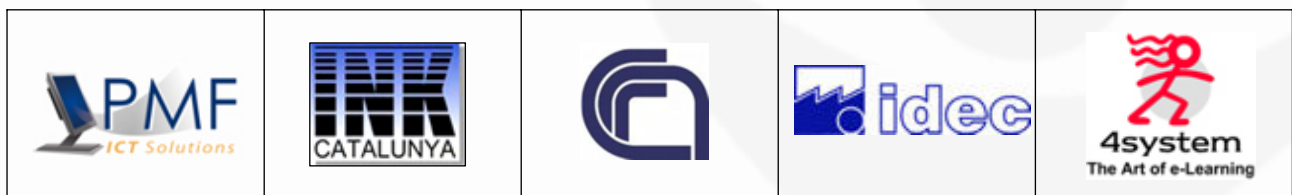
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## Reviews History

Version	Date	Modifier	Remarks
0.1	21.01.2008	4system	Index of PCM course
0.11	21.01.2008	PMF	Remarks concerning Index
0.2	30.01.2008	INK	New version of course's Index
0.3	20.02.2008	PMF	The final version of Index
2.1	16.06.2008	PMF	Contribution concerning PCM SOA
2.2	18.06.2008	INK	Contribution concerning PCM SOA
2.3	03.07.2008	IDEC	Contribution concerning PCM SOA



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## Executive Summary

Objective:

- SOA on PCM
- Definitive e-Course Index
- Indication about users pathway



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## 1. Introduction

What does PCM mean?

The method describes procedures used for management and decision-making during the lifetime of a project. It also specifies other variables such as tasks, responsibilities, key documents.

The European Commission considers PCM as the most relevant tool for managing and designing projects. The method is based upon the Logical Framework Approach.

## 2. PCM (Project Cycle Management)

**“Project cycle management”** (PCM) is the term given to the process of planning and managing projects, programmes and organizations. It is widely used in the business sector and is increasingly being used by development organizations. Development projects sometimes fail because they are badly planned and do not take account of some important factors, particularly the needs and views of stakeholders. PCM is based around a project cycle, ensuring that all aspects of projects are considered comprehensively. A central element of the PCM method is that all aspects of the project are reconsidered throughout the project cycle to ensure that any changes which have occurred are included in the project design. As a result, projects are more likely to be successful and sustainable. PCM involves a set of planning tools which fit into the logical framework (commonly known as a log frame). The log frame is a table which gives a summary of the project plans. Some donors now expect log frames to be submitted alongside project proposals. Log frames can seem quite complex to many people: this means that some organizations find they are unable to access donor funding. This book explains the process of completing log frames in a simple way in order to increase the ability of organisations to access such funding. However, organisations may want to start using the log frame for all their projects, whether they are applying for donor funding or not. This is because the process of completing the log frame is in many ways more useful than the end product. The process is important for project success, sustainability and organisational learning. Throughout the book we discuss about using project cycle management for project implementation because this is probably the way in which PCM will be used most extensively. However, all of the tools can be used just as effectively for planning programmes and managing and developing organisations.”<sup>1</sup>

Project/Programme Cycle Management (PCM) is the method introduced by the European Commission for the identification, formulation (appraisal), implementation and evaluation of projects and programmes. It provides a consistent approach to all components of the intervention cycle, ensuring beneficiary-orientation (relevance), a comprehensive perspective on interventions (feasibility and sustainability) and effective monitoring and evaluation. Because this approach has been proven to significantly improve the feasibility of plans and sustainability of the interventions, it is now being implemented as the standard method for bilateral donors and NGOs throughout Europe and among national governments in many recipient countries.<sup>2</sup>

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<sup>1</sup> Project cycle management by Rachel Blackman, Tearfund 2003

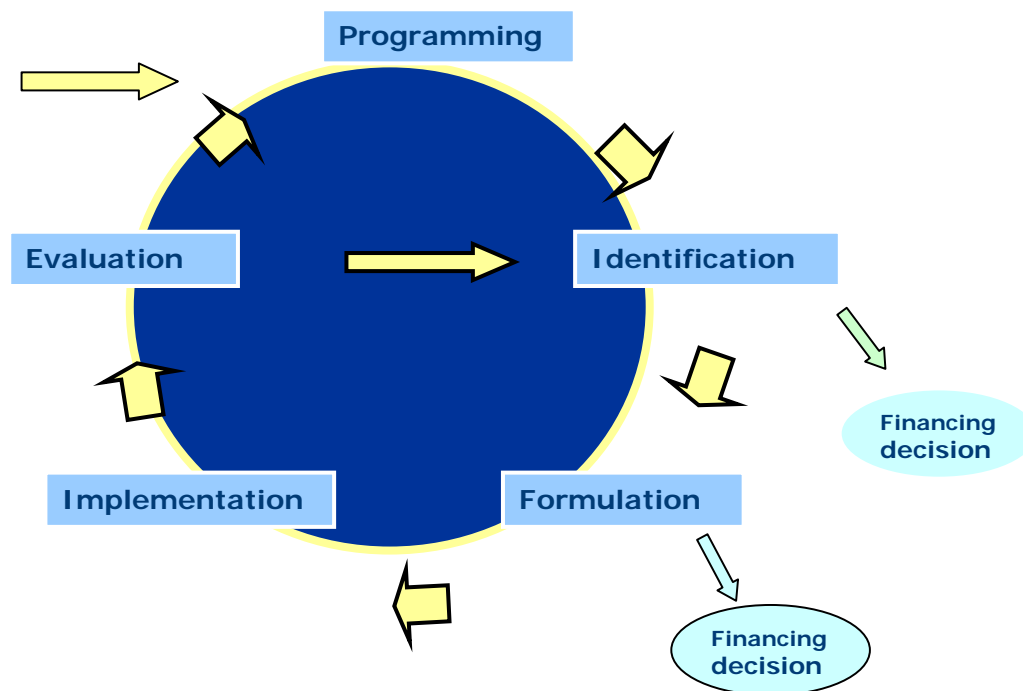
<sup>2</sup> Project Cycle Management and good governance in the 2007-2013 European Social Fund, Indrija Askeloviciene Valentina Benni, Jenny Charlier, Bartosz Gruzca, Concetto Maugeri, Serenella Paci, Monica Puel

The way in which projects are planned and carried out follows a sequence beginning with an agreed strategy, which leads to an idea for a specific action, oriented towards achieving a set of objectives, which is then formulated, implemented, and evaluated with a view to improve the planned strategy and further action. The project cycle provides a structure to ensure that stakeholders are consulted and relevant information is available, so that informed decisions can be made at key stages in the life of a project.<sup>3</sup>

In order to effectively manage the growing number of integrated and partnership projects, project managers, evaluators and contractors require new concepts and tools. PCM is a set of concepts and tools specifically designed to make integrated and partnership projects and programmes more efficient, easier to implement and more transparent. A number of international agencies have adopted PCM as a standard planning and management tool. Almost all UN agencies (such as FAO and UNDP) have used PCM since the 1960's. In addition, since 1993, numerous General Directorates of the European Commission, such as the one responsible for development aid, have adopted it as a planning standard.<sup>2</sup>

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**The PCM five main steps look as follows:**



<sup>3</sup> Project cycle management handbook, European Commission EuropeAid Co-operation Office General Affairs, March 2002



Key features of PCM – projects are:

1. Support the EU policy objectives
2. Support the national strategies
3. Addresses relevant problems recipients
4. Have feasible, achievable objectives
5. Benefits are likely to be sustainable

### **Main terms of PCM issues:**

#### **European Commission**

The European Commission is a politically independent institution which represents and upholds the interests of the European Union as a whole. It proposes legislation, policies and funding programmes for action and it is responsible for implementing the decisions of the Parliament and the Council. It is the executive body of the EU, whose goal is to help EU to attain its goals.

#### **Directorate general (DG)**

The staff of the Commission is organised under distinct departments, called DGs or Directorate generals. Each DG is responsible for specific tasks or policy areas. The administrative head of a DG, called the Director General, is under one of the Commissioners' responsibility. Each Commissioner is responsible for one or more DGs.

#### **Agencies**

EU bodies having a distinct legal personality, and to whom budget implementing authorities may be delegated under strict conditions. They are subject to a distinct discharge from the discharge authority. Executive agencies are created following a commission decision to implement all or part of a community programme directly from the EC budget.

#### **Logical framework**

A table which gives a summary of project plans.

#### **Evaluation**

An assessment carried out at, or after, the end of a project to show its impact.

#### **Programming period**

The period for which the European Council has voted the policies and the European Parliament has voted the programmes, budget lines, budget, budget distribution per country and policy as well as funding regulations. Actually we are running the programming period 2007-2013.

#### **Programmes**

A programme is a planned and organised series of events which seek to address a particular problem or to promote a development, in line with formally stated goals and objectives. It may consist of a single activity or a series of related activities and operate at a number of levels (international, national, regional and local). It may also involve intermediate agencies, each of which has a different role and responsibility. Policies underlying a programme may, for example, be formulated at the level of a national government or the EU. Operational and monitoring procedures may be drawn up by a semi-state body or local authority and the programme may be implemented by voluntary organisations, area-based or international partnerships etc.



## **Project**

A project is a scheme which seeks to address some identified needs, deficit or development possibility within a specified time limit. Projects frequently explore innovatory ways of meeting needs and pilot projects are likely to have applications for future programmes or services. It frequently happens that programmes are implemented through the means of projects.

## **Project cycle**

It follows the life of a project from the initial idea to its completion. It provides a structure to ensure that stakeholders are consulted, and defines the key decisions, information requirements and responsibilities at each phase so that informed decisions can be made at each phase in the life of a project. It draws on evaluation to build the lessons of experience into the design of future programmes and projects.

## **Project cycle management**

A methodology for the preparation, implementation and evaluation of projects and programmes based on the integrated approach and the logical framework approach.

## **Accompanying measures**

Actions supported by the RTD framework programmes to contribute to the implementation of a specific programme with a view to enable them to achieve or define their strategic objectives. They will also contribute to the preparation of future activities.

## **Budget line**

Specific budget managed by a General Directorate through calls for proposals in order to finance complementary policies. Multiannual programme refers to programmes established for several consecutive years. These programmes usually last for 3-7 years.

## **Managing authority**

A private or public authority or the Member State itself, designated by the Member state at the national, regional or local level to carry out the task of managing assistance from the structural funds. National Agency or National Contact Point is the organisation appointed in each country to promote and administer the various FP7 sub-programmes funded by the EU.

## **European Structural Funds**

Structural funds are the main instruments to finance EC policies.

## **European Social Fund (ESF)**

The European Social Fund (ESF) is the main financial tool of the European Commission as far as training, human resources development, employment, knowledge society and social inclusion policies are concerned.

## **European Regional Development Fund (ERDF)**

The European Regional Development Fund (ERDF) is the main tool of the European commission for regional development, including the construction of infrastructures, such as railroad networks, ports, highways etc.



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### **European Agricultural Guidance and Guarantee Fund (EAGGF)**

The European Agricultural Guidance and Guarantee Fund (EAGGF) is used to finance EC agricultural policies. The EAGGF is composed of two sections, the Guidance section and the Guarantee section. Within the framework of European economic and social cohesion policy, the EAGGF supports rural development and the improvement of agricultural structures.

### **European Cohesion Fund**

It is established to reinforce policies and channel funds towards EU members, whose national income is below 90% of the EU average. It partly finances mainly environment and transport infrastructure actions of common interest with a view to promote social cohesion and solidarity among Member-States.

### **Financial Instrument for Fisheries Guidance (FIFG)**

The Financial Instrument for Fisheries Guidance (FIFG) aims to contribute to achieving a sustainable balance between fishery resources and their exploitation. It also seeks to strengthen the competitiveness of the sector and the development of areas dependent upon it.

### **European funds**

European funds entail more than 450 funding programmes, reimbursable grants, aid schemes, individual fellow and traineeships, loans and guarantees. It includes all European public funds allocated by the European Commission and the European Investment bank.

### **Official Journal of the European Communities**

Official publication of the EU gathering all Council's decisions related to programmes, information on the next calls for proposals, the call of proposals etc. It contains three sections L (legislation), C (information, notices and preparatory legislation) and S (supplement).

### **Call for proposals**

The European Commission issues a publication (the Official Journal of the EC) in which it describes the aims and priorities for funding required for project. The publication indicates clearly the priorities funded on a precise budget, the type of entities entitled to submit a proposal, all necessary documents and the precise deadline to apply.

### **Call for tenders**

It is a private or public procedure by which a purchaser puts in competition potential suppliers on a large-scale contract. The call for tenders may be published at the local, national or EU level.

### **Check list**

Document attached to the application form of the call of proposals. It mentions the various documents needed.

### **Guide for applicants**

The guide for applicants is specific for each programme and each call for proposals. It contains essential information, which helps the candidate to prepare its proposal.



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### **Applicant organisation (the applicant)**

Any legal organisation, private, public or semi-public submitting an application. The applicant organisation becomes the contracting organisation if the proposal is approved and the grant agreement is signed.

### **Beneficiary**

A legal entity private, public or semi-public, which is responsible by the grant agreement (contract) for the coordination and management of the project including the dispatch of the funds. In EuropeAid projects the beneficiary receives the money and directly reports to the Commission. In FP7 projects beneficiary designs every organisation participating in the consortium. Among the beneficiaries the coordinator represents the whole consortium towards the Commission.

### **Partners**

All legal entities participating in the submission of a project's proposal. The partners of the project must sign the Partnership declaration, by which they commit themselves to participate and contribute to the implementation of the project as described in the grant's application.

### **Transnational partnerships**

Partnership of different actors from different states that work together across national boundaries. Almost all EU-funded programmes require a transnational element in order to enhance co-operation between member states.

### **Consortium**

Group of partner of the private and/or the public sector who associate themselves in order to develop a project financed by the European Commission.

### **FP7 Programme**

The seventh generation framework programme for research, technologic development and demonstration activities.

### **Competitiveness and Innovation Programme**

A 2007-2013 programme which aims at encouraging the competitiveness of European enterprises and to enhance innovation in all industrial sectors, especially in the use of information and communication technologies and to help and develop the information society. It also enhances the use of renewable energies and energy efficiency. As far as small and medium size companies (SMEs) are concerned, the programme will support innovation activities, including eco-innovation, provide better access to finance and deliver business support services to the regions.

### **ICT Policy Support Programme**

The ICT Policy Support Programme (or ICT PSP) is a part of the Competitiveness and Innovation Programme.. It aims at stimulating innovation and competitiveness through the wider uptake and best use of ICT by citizens, governments and businesses. The ICT Policy Support Programme runs from 2007 to 2013 with a budget of 730 million €. The programme builds on the aims of the previous e-TEN, Modinis and e-Content programmes and will support the aims of the new integrated strategy i2010 - European Information Society 2010.



### **Intelligent energy Programme**

The Intelligent Energy - Europe programme 2007 – 2013 is part of the Competitiveness and Innovation Programme. It is the EU's tool for funding action to improve these conditions and move us towards a more energy intelligent Europe.

### **Lifelong Learning Programme**

The Lifelong Learning Programme (LLP) supports learning opportunities from childhood to old age in every single life situation. It has a budget of € 7000 millions for the period 2007-2013, and is the successor to the current Socrates, Leonardo da Vinci and eLearning programmes. It is made up of 4 sectoral sub-programmes (Comenius, Erasmus, Leonardo da Vinci, Grundtvig), 4 transversal programmes (Policy cooperation and innovation in education and training, languages, ICT based content and services, dissemination and exploitation of results of the programme) and the Jean Monnet programme.

### **Operational Programme**

Document written by the States and the Regions and proposed to the European Commission in order to establish the action plan for national and regional economic and social development. The operational programme makes a diagnosis of the actual situation and proposes EU funds for each priority.

### **Joint actions**

They are the result of a close cooperation between different institutions and stakeholders. They are used for transversal actions (Research and Development, education) and for issues for which having a single level of action is not considered pertinent.

### **SWOT analysis**

Analysis of an organisation's strengths and weaknesses, and the opportunities and threats that it faces. A tool that can be used during all phases of the project cycle.

### **Consortium**

Contract established between the partners of a cross-border project, which regulates property-linked problems including the exploitation of research results and specifies elements related to the validity of the standard contract with the Commission. It usually defines relationships between the different participants and their level of responsibility regarding the project. It does not repeat the content of the contract, nor disapproves it, but completes it and clarifies details which are specific to the specific consortium upon technical, commercial, organisational, financial and juridical dispositions.

### **Agreement**

### **Intellectual Property Rights (IPRs)**

Products of European projects are often subject to intellectual properties rights. In some cases it is determined in the call for proposals or in the Contract with the Commission, if these products will be free to everybody or in most cases if the EC retains the right to present or publicize them. In any case, partners have to agree formally, who will have the right to exploit which result and if there will be a patent covering one or more products.

### **Copyright**

It usually belongs to the authors of the products of European projects. Intellectual Property Rights



Agreement is signed by partners in same stage of the duration of the European project. It aims at regulating relations between partners as far as the commercial exploitation of joint products or their further development is concerned after the duration of the contract.

### **Dissemination plan**

Dissemination plan is a document, which summarises information about what dissemination or promotion activities of the European projects' products will be undertaken by which partner and when, during the implementation of the project. Such activities may be for example, web site, direct mailing, brochure, poster, workshops, conferences, participation in fairs, articles to newspapers, press release etc.

### **Project logo**

Each project has a graphic sign or logo, which allows its easy identification in all products, promotional material as well as correspondence. The logo has to be agreed upon by partners. It may also be protected by a trademark.

### **Business plan**

In the case of European projects it usually is a feasibility study if a certain product developed or a business activity preview can be successful in the market and viable. It usually takes into consideration marketing, administrative, production and financial parameters and examines the business results. It often examines also a good and a bad case scenario.

### **Exploitation plan**

It as a plan stating which activities will undertake each partner in order to commercialise one or more products of a European project, after the project ends. It usually comprises the characteristics of the product, the market and target groups, competition, positioning, promotion activities, packaging, pricing, delivery channels and, in some cases, calculation of the break even point.<sup>4</sup>

## **2.1 PCM in Europe**

The main contact with Project Cycle Management we get from European Equal Community Initiatives in many European countries. The European Union and Country Governments helps with organization of all conferences and publications. There are many websites with all the information about terms of conferences, the kind of publications, etc.

- <http://www.equal.org.pl/index.php?lang=en> (English),
- <http://www.esf.se/esf/templates/Page.aspx?id=607> (Swedish),
- <http://www.equal.ecotec.co.uk> (UK).

Many Universities in Europe have lectures about it on the study programs. Students can learn about the tools and techniques (logical frameworks) of project cycle management and practice it in real live examples. The universities organize conferences about PCM to and sometimes do an open

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<sup>4</sup> <http://www.bonynetwork.eu/wiki/index.php/Glosary>



training for all people, even foreigners (for example: The University of Reading (UK) provides full courses about all aspects of Management Skills as well as Project Cycle management.)

Other examples of conferences and university lectures:

- <http://www.formez.eu/search/node/Project+Cycle+Management> (Italy),
- <http://wlv.openrepository.com/wlv/handle/2436/21616> (University of Wolverhampton, UK, Centre for International Development and Training (CIDT),
- [http://www.econ.kuleuven.be/public/NDCALB6/VIETNAM/VLIR/Call\\_OI/own\\_bijlage07.pdf](http://www.econ.kuleuven.be/public/NDCALB6/VIETNAM/VLIR/Call_OI/own_bijlage07.pdf) (The Faculty of Business and Economics (FBE), Belgium).

There are many open communities and corporations that have info on their web pages about Project Cycle Management. Some of them do an e-learning courses through the internet but usually after payment or some donation

- [http://www.training-classes.com/learn/\\_k/p/r/o/project\\_cycle\\_management/\\_t/online/](http://www.training-classes.com/learn/_k/p/r/o/project_cycle_management/_t/online/),
- <http://www.visitask.com/> (Romania),
- <http://www.mdf.nl/> (Holland),
- <http://www.sns-equal.it/> (Italia),
- <http://www.slideshare.net/icitarelli/sound-planning-cop-lisbona07> (2nd Meeting of eLearning representatives of EU PA institutes INA Lisbon, Portugal 17/10/07).

Many companies who providing e-learning courses have in their offer several courses in Project Management but not in PCM. Moreover access to them is payable. For example STS Saunter Training & Simulations SA - a company from Switzerland offers Project Management Fundamentals and Project Management Advanced for 400 Euro.

## 2.2 Poland

Polish people, companies and universities are very interested in PCM. There is a lot of articles, publications, but it's hard to find any good courses about PCM – especially e-learning courses.

Project Cycle Management (PCM) & EQUAL Community Initiative in Poland:

An evaluation report on the application of project management tools by Development Partnerships (including as many as 17 institutions) in Activity2 of the EQUAL Community Initiative was published in April 2007. Special attention was paid to the application of the PCM methodology and related techniques, as well as the assessment of their usefulness. The evaluation was carried out in January 2007.

According to the report, 70% of the institutions participating in the EQUAL Community Initiative Programs used the project cycle management methodology. This is a considerably high ratio, particularly as PCM was only recommended by the Managing Institution. To many of these organizations this was the first opportunity to become acquainted with any project management methodology and some of them had never implemented any project of the type. The Partnerships almost unanimously concluded that the decision to recommend PCM was right.

As many as 93% of respondents intend to apply this methodology in the future.

College of Enterprise and Administration provides major “Managing company on EU market” which includes 16 hour course about PCM.

University of Gdańsk provides 15 lectures about Project Management.



From time to time there are organized workshops and conferences containing subject of Project Cycle Management. There are few companies in Poland that provides courses, workshops, etc. For example:

- Company „Skills – doradztwo i szkolenia” is a consulting and training company which specialize in: project management (methodologies: PRINCE2, PMBOK, PCM), obtaining funds (from European Union and other sources), carry on open and close traditional training, e-learning, m-learning.
- „Skills – doradztwo i szkolenia” is preparing workshop „Zarządzanie projektami za pomocą PCM” (translation: Projects management with PCM). The main concept of this training is passing basic knowledge about PCM. Training show us basic elements of PCM method construction and how to use PCM in practice.

Website: [http://www.szkolenia.skills.pl/s\\_zarz\\_projektami\\_PCM.htm](http://www.szkolenia.skills.pl/s_zarz_projektami_PCM.htm)

- Company „WiedzaNet” specialises in the production and distribution of high quality e-learning courseware and delivery of services supporting the learning process. The company was established in 2001.
- “WiedzaNet” prepared e-learning course: „KWN002 Dotacje i co dalej. Zarządzanie i rozliczenie projektów unijnych.” (translation: KWN002 Grant and now what. Management and settlement European projects).

The main concept of this training is to get knowledge about managing project with PCM, prepare application on payment, monitoring, role of reporting in European projects, controlling, information and promotion, evaluation, Bank service in projects.

Website:

[http://www.wiedzanet.pl/katalog.php?id=73&l=0&strona=dir\\_tresc&id\\_kursu=KWN002&yt=KWN002+Dotacje+i+co+dalej.+Zarz%B1dzenie+i+rozliczenie+projekt%F3w+unijnych](http://www.wiedzanet.pl/katalog.php?id=73&l=0&strona=dir_tresc&id_kursu=KWN002&yt=KWN002+Dotacje+i+co+dalej.+Zarz%B1dzenie+i+rozliczenie+projekt%F3w+unijnych)

- “Information Systems Department (BI group)” - is one of four research and development groups in the Institute of Mathematical Machines Basic activity of the group concentrates on systems designing, development and implementation.

They had free of charge e-learning course: „Zarządzanie projektem” (translation: Project management). Training provides basic knowledge of PCM. The course ends with certificate.

Website:

<http://e-learning.roefs.pl/TeleEduWeb/Wyszukiwarka/WsMainForm.aspx?appl=Ws>

- “Centrum Kreowania Liderów S. A.” has mission to establish conducive conditions for developing and teaching professional skills of managers in modern Poland.

Company is preparing workshops which will rise participants skills of effective management, planning and evaluating projects. Website:

[http://medialine.pl/artukul.php?getpage\\_id=10&getsubpage\\_id=4&artukul\\_id=181&PHPSESSID=de](http://medialine.pl/artukul.php?getpage_id=10&getsubpage_id=4&artukul_id=181&PHPSESSID=de)

- ISFOL, The Ministry of Labor in Italy, EQAL Community Initiative and “Fundacja Fundusz Współpracy” (Cooperation Fund Foundation) have created free e-learning course: „Zarządzanie Cyklem Projektu” (translation: Project Cycle Management).

This training initiative aimed at transferring the PCM methodology and developing PCM skills useful for all key actors involved in project planning and management, by promoting



the use of a common language to ensure the quality of identification, formulation, implementation, monitoring and evaluation of interventions. Website:

<http://www.equal.org.pl/pcm.php?M=6&lang=pl>

The Cooperation Fund Foundation was established by the State Treasury in September 1990. It was founded in response to the need for a non-political, specialized and efficient organization that would transparently manage aid funds on behalf of the Government and assist the implementation of EU supported projects.

The Equal Community Initiative is a programme implemented since 2001 in 25 European Union Member States, financed by the European Social Fund and directly by the budgets of the participant states

### **2.3 Czech Republic**

Over the past 10 years Nadace Rozvoje Obcanske Spolecnosti (NROS) has been a major grant-giver and implementation agency for PHARE programme support to Civil Society Organisations (CSO). When analyzing some projects managed by NROS and foreign entities being involved in the process – it can be underlined problems were assigned people and personnel management. Participant's fail was attached almost all parts of programming cycle from monitoring and evaluation through project assessment and beyond.

Even Co-founder of the PCM methodology says, that is it much easier to understand PCM then use it in efficient way. So it happened in Czech.

### **2.4 Estonia**

Estonia is an example for showing direction of investing of the biggest IT players on the market, like: IBM, SUN, SAP, or Microsoft.

Progress of Estonian's market is based on strong relationship with the University community, based on conferences, e.g. <http://www.ut.ee/EUNIS2006/>

The strongest influence from already EU member countries come from Italy, Spain and United Kingdom (e.g. <http://www.formez.eu/poland>) and there you can find the biggest number of training courses excluding ecourses and eLearning in this area (although there are few requiring enrolment key to start work with).

### **2.5 Spain**

European Project Management is a relatively young subject in Spain. Recently it has increased its significance mainly in the industrial and service sectors, but in the Academic world its application is still limited. During the last 15 years the growth of the financial opportunities for innovation and development projects encouraged by the European Commission, has favoured the professional management of European projects. Therefore, there are local authorities and some private institutions that are offering seminars, courses in European Project. Some examples are:



1. PymERA is a national network created by Science and Technology Ministry, in which take part organizations from all the Spanish autonomous regions to encourage and facilitate the participation of Spanish SME's in projects within EU's Framework Programmes for Research and Innovation. PymERA network edited in different Spanish autonomous regions the "Practical Guide of European Project Management". (One example can be found in Spanish in: [http://www.ub.edu/oper/documents/Guia7PM\\_Balears.pdf](http://www.ub.edu/oper/documents/Guia7PM_Balears.pdf)).
2. Universitat Pompeu Fabra - IDEC (Institute of lifelong learning), offers a 2-days-on-site training seminar in Management of European Research and Development projects.
3. CIDEM (Innovation and business development Centre) and Acc10 (new catalan agency promoting the competitiveness in business) organise on-site seminars about specific subjects of European Project Management (e.g. How to elaborate a project proposal, how to manage the consortium agreement). CIDEM has elaborated in 2006 (without continuity) on-line specific courses offered via e-mail.
4. Some Private institutes offers on-line and in-site courses on Project Management (for example Instituto de Formación Integral – CEIM, Euradia Internacional).

In Spain it is important also to make reference to international material refereeing European Project Management, in the literature we found, the Internet constitutes one of the main channel to retrieve information. As a matter of fact, most of the information is directly downloadable for web sites. They are: specialised training (traditional or distance learning or both):

- Europe Media psc: company developing training programmes on community programmes and European funded projects. Web site: [www.eutrainingsite.com](http://www.eutrainingsite.com)
- A survival kit for European project management: [www.sokrates.at/survivalkit](http://www.sokrates.at/survivalkit)
- The European Union's ICT Program in FP7, Myer W. Morron, EFP Consulting Ltd. Can be downloaded in its different versions from the web site dedicated to European project management: [www.efpconsulting.com](http://www.efpconsulting.com).
- VIT@MIB, web site dedicated to the management of European project. They offer training, consultancy but also a web-based tool to "do it yourself" from the presentation to the development of the project (<http://vitamib.com/services>).
- [www.welcomeurope.com](http://www.welcomeurope.com), website dedicated to European proposal development and project management; training and consultancy.
- [www.eurotop.be](http://www.eurotop.be), consultancy on European projects from the writing a proposal to the final reporting.

## 2.6 Germany

Projectmanagement is the description of the whole project management methods.

- (EU-) Support for elearning (abstract)

[http://www.dl-forum.de/deutsch/programme/49\\_DEU\\_HTML.htm](http://www.dl-forum.de/deutsch/programme/49_DEU_HTML.htm)

Offers of privates company for PM-elearning-Courses:

- Tiba:



<http://www.tiba.de/s2w/userfiles/mm/126.pdf>

- 21Learnline AG

<http://www.21learnline.com/>

- HPES Deutschland - Racing Simulation

<http://h41156.www4.hp.com/education/article.aspx?cc=de&ll=de&id=445>

- Haufe Akademie

<http://www.at-mix.de/news/1055.html>

<http://www.haufe-akademie.de/hierarchy/e-learning;jsessionid=D4BF101385F49D7132EDD5DB181F682C?jsAllowed=true>

- Artemis International GmbH

Artemis is a world-wide leading provider in the range of the enterprise Portfolio, project and the resource management software products.

<http://de.aisc.com/Product/5>

- GiMA consult Gesellschaft für integriertes Management mbH

<http://www.wir-neckar-alb.de/angebote/business/ccpm>

Intensive courses in Project management

Length: The learning time: 36 hours, incl. 2,5 days in Workshop and 16 hours online.

- Simplicity GmbH

<http://www.wiwi-treff.de/home/index.php?mainkatid=1&ukatid=12&sid=43&artikelid=2539&pagenr=0>

- free PM-elearning course <http://netcoach.orbis.de/Projektmanagement>
- Metier Academy GmbH

Course: Projectmanagement- essentials

[http://de.metieracademy.com/openprogramm/e\\_learning\\_kurse\\_1/pma\\_int\\_ind\\_a](http://de.metieracademy.com/openprogramm/e_learning_kurse_1/pma_int_ind_a)

Course information:

The course consists of 17 lessons, for which on-line access for 6 weeks. You are supported by a E-Learning Coach during the course time. There is approx. 20 hours depending upon individual learning speed.

- Global Knowledge

Elearning course: Projektmanagement - Introduction

<http://www.globalknowledge.de/Default.aspx?page=461&coursecode=GK2868>

- bfz gGmbH

[www.learntec.de/cgi-bin/x-mkp/download.pl?file=/pressbox/3-51.pdf](http://www.learntec.de/cgi-bin/x-mkp/download.pl?file=/pressbox/3-51.pdf)

Offers of Universities in PM elearning courses:

- TU Berlin

Global Projektmanagement

A qualification program for scientific coworkers and high-level personnel in international research projects: Blended Learning: 130 on-line hours, 86 workshops hours

<http://www2.tu-berlin.de/zek/wb/gpm/index.html>

- Projektmanagement-Akademie

<http://www.pm-kurs.de/>



- E-learning in Hessen

[http://www.e-learning-hessen.de/de/kompetenzzentren/uebersicht/?no\\_cache=1](http://www.e-learning-hessen.de/de/kompetenzzentren/uebersicht/?no_cache=1)

- Übersicht Elearning Angebote an deutschen Hochschulen:

<http://www.studieren-im-netz.de/index.aspx>

## 2.7 Italy

Pursuing better quality projects and more effective Programme delivery is a strategic objective which has informed the second Round of EQUAL in Italy: the Single Programming Document, the applicant's package and the core TA service provision. In keeping with the logic of the new ESF, the Italian Managing Authority has delivered a set of capacity building actions aimed at upgrading the skill base of project and programme managers in EQUAL, and possibly beyond. To this end, a strategic investment was made to promote Project Cycle Management (PCM), an integrated approach successfully tested in a number of EU-funded programmes and international organisations.<sup>5</sup>

Companies which deal with PCM courses:

### **Scuola Superiore di Facilitazione**

[www.scuoladifacilitazione.it](http://www.scuoladifacilitazione.it)

- ISFOL, The Ministry of Labor in Italy, EQAL Community Initiative has created free e-learning course: „Project Cycle Management”.

<http://www.sns-equal.it/>

## 2.8 Greece

In Greece many institutions have courses for Project Management. These courses however use the classic method of teaching in classrooms rather than using e-learning tools as a method of delivery.

Companies, organizations or universities that are involved in Project Management courses are among others:

- ITEC :

<http://www.itec.edu/Forms/mainpage.aspx>

- National Technical University of Athens on-line course for PCM

<http://www.imu.iccs.gr/courses/pm-proptyxiako/material.html>

[http://mycourses.ntua.gr/course\\_description/index.php?cidReq=ECE1030](http://mycourses.ntua.gr/course_description/index.php?cidReq=ECE1030)

- Hellenic American Union Center for Excellence in Project Management

[http://www.hau.gr/?i=hau.en.mgt\\_exec\\_coe](http://www.hau.gr/?i=hau.en.mgt_exec_coe)

HAU CoE in Project Management has been the first training organization in Greece to offer a *holistic educational and cultural approach* to the methodology. Basic training, special tools, linking

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<sup>5</sup> [http://ec.europa.eu/employment\\_social/equal/news/200608-msf-it\\_en.cfm](http://ec.europa.eu/employment_social/equal/news/200608-msf-it_en.cfm)



methodology with other methods such as Six Sigma, RUP, etc, people skills, certifications, in-house solutions, library, networking, career planning and problem solving, constitute the framework of our services operating under a dual goal: aligning strategy with project management excellence and transforming project managers to champions of the profession.

- Democritus University of Thrace – Project Management Laboratory  
<http://utopia.duth.gr/~dpanag/>
- Project Management Institute Athens  
<http://www.pmi-greece.org/>
- Aristotle University of Thessaloniki, Research Comitee, Project Management  
<http://www.rc.auth.gr/%CE%94%CE%B9%CE%B1%CF%87%CE%B5%CE%AF%CF%81%CE%B9%CF%83%CE%B7%CE%88%CF%81%CE%B3%CF%89%CE%BD/tabid/62/Default.aspx>
- Economic University of Athens, Project Management  
[http://www.dmst.aueb.gr/gr2/Courses2/5sem/21\\_project\\_management/main.htm](http://www.dmst.aueb.gr/gr2/Courses2/5sem/21_project_management/main.htm)
- 3rd International Athens Conference on Project Management Best Practices, on 23/06/2008  
<http://conferences.hau.gr/?i=project2008>

### 3. Definitive e-learning course Index

In order to prepare the exhaustive e-course the Index of the content was elaborated. Each partner had taken part in preparing the final version of Index.

#### 3.1. First proposition

Below is the view of the first proposition of PCM course Index:

##### 1. Basic Concepts

- 1.1 Policy, programmes and European projects
- 1.2 European projects participants
- 1.3 The objective aims of the projects

##### 2. European projects

- 2.1. Origination as well as specification of the European projects
  - 2.1.1. Projects financed from the Structural Funds
  - 2.1.2. Interdependence of the projects pursued within the area of Common Regional Policy
  - 2.1.3. Projects realized within Community Initiatives
  - 2.1.4. Projects co-funded from the Common Regional Policy
  - 2.1.5. Projects deriving from EU programs
- 2.2. Kinds of European Projects

##### 3. Institutions participating in European projects

- 3.1. Payment Institutions
- 3.2. Management Institutions
- 3.3. Mediation Institutions



- 3.4. Providing Institutions
- 3.5. Beneficiaries
- 3.6. Monitoring Committees

#### **4. European Project Management Methodology**

- 4.1. Methodical requirements regarding European projects
- 4.2. Project cycle Management Methodology
- 4.3. Project cycle
  - 4.3.1. Project cycle concept
  - 4.3.2. Programming Phase
  - 4.3.3. Identification Phase
  - 4.3.4. Formulation Phase
  - 4.3.5. Implementing and Monitoring phase
  - 4.3.6. Evaluation and audit phase

#### **5. European Project planning**

- 5.1. Meaning and the scope of European project planning
- 5.2. European project structures
- 5.3. Project structure planning
- 5.4. Defining the project activities/functions
- 5.5. Planning the course of the project
- 5.6. Defining the miles stones of the project
- 5.7. Project resources planning
- 5.8. Project budgeting
- 5.9. Steering of the project

#### **6. European project Expenditures Eligibility**

- 6.1. General issues
- 6.2. Principle of incurred expenses
- 6.3. Principle of income accounting
- 6.4. Principle of purchasing
- 6.5. Principle regarding Vat and other taxes as well as payments
- 6.6. Principle regarding credit funds
- 6.7. Principle regarding guarantee funds
- 6.8. Leasing Principle
- 6.9. Principle regarding incurred costs
- 6.10. Principle regarding qualifying ventures depending on localization
- 6.11. Additional regulations regarding eligibility of expenditure.

#### **7. Calculation of project effectiveness**

- 7.1. Approach to the calculation of project effectiveness
- 7.2. Cost Benefit Analysis
  - 7.2.1. Analysis general principles
  - 7.2.2. Characteristics of the CBA analysis
  - 7.2.3. The principles of conducting the analysis
  - 7.2.4. Decision criteria based on CBA
  - 7.2.5. Advantages and disadvantages of the CBA analysis



- 7.3. European projects analysis
  - 7.3.1. Types of European projects analysis
  - 7.3.2. General characteristic of NPV and IRR
  - 7.3.3. Financial analysis of European projects methods
  - 7.3.4. European projects economic analysis
- 7.4. Risk assessment
  - 7.4.1. The gist and principles of risk assessment
  - 7.4.2. Sensitivity analysis

## **8. Evaluation, monitoring and control**

- 8.1. Significance of evaluation of EU projects
- 8.2. Project evaluation
- 8.3. Project Monitoring
- 8.4. Project control
- 8.5. Audit
- 8.6. European Projects Evaluation requirements
- 8.7. Classification of European Projects evaluation
- 8.8. of European Projects valuation
- 8.9. An example of project evaluation

## **9. Project team management**

- 9.1. Competences of project team
- 9.2. Characteristic of project manager
- 9.3. Tasks of project manager
- 9.4. Building of the project team
- 9.5. Betterment of project team
- 9.6. Coordination of work on project

## **10. Public orders in European Project**

- 10.1. Introduction
- 10.2. Public orders and structural funds
- 10.3. Basic rules of public orders financing
- 10.4. Public orders financing procedures

### **3.2. Final version of Index**

After discussion over the draft of Index partners decided to establish the following Index of PCM e-course:

#### **1. Basic Concepts**

- 1.1 Policy, programmes and European projects
- 1.2 European projects participants
- 1.3 The objective aims of the projects
- 1.3 Kinds of European Programmes (7FM, Lifelong learning, etc)

#### **2. European project cycle**

- 2.1. Building of the project consortium



- 2.2. Phase 1: preparing a proposal
  - 2.2.1 The Logical framework
  - 2.2.2 State of the art and innovation
  - 2.2.3 European add value
  - 2.2.4 Impact
  - 2.2.5 Budget
  - 2.2.6 Project resources planning
  - 2.2.7 GANTT diagram and PERT Chart
  - 2.2.8 Defining the miles stones of the project
  - 2.2.9 Deliverables
  - 2.2.10 Ethical issues
- 2.3. Phase 2: Evaluation and negotiation
- 2.4. Phase 3: Project management
- 2.5. Phase 4: take advantage of the project: exploitation

### **3. European Project Management Methodology:**

- 3.1. Workplan for each partner
- 3.2. Building of the project team
- 3.3. Administrative management
  - 3.3.1. Project Monitoring
  - 3.3.2. Type of reports
- 3.4. Financial management
  - 3.4.1. General issues
  - 3.4.2. Accounting
  - 3.4.3. Conditions of payment
  - 3.4.4. European project Expenditures Eligibility
- 3.5. Audit

### **4. Legal aspects**

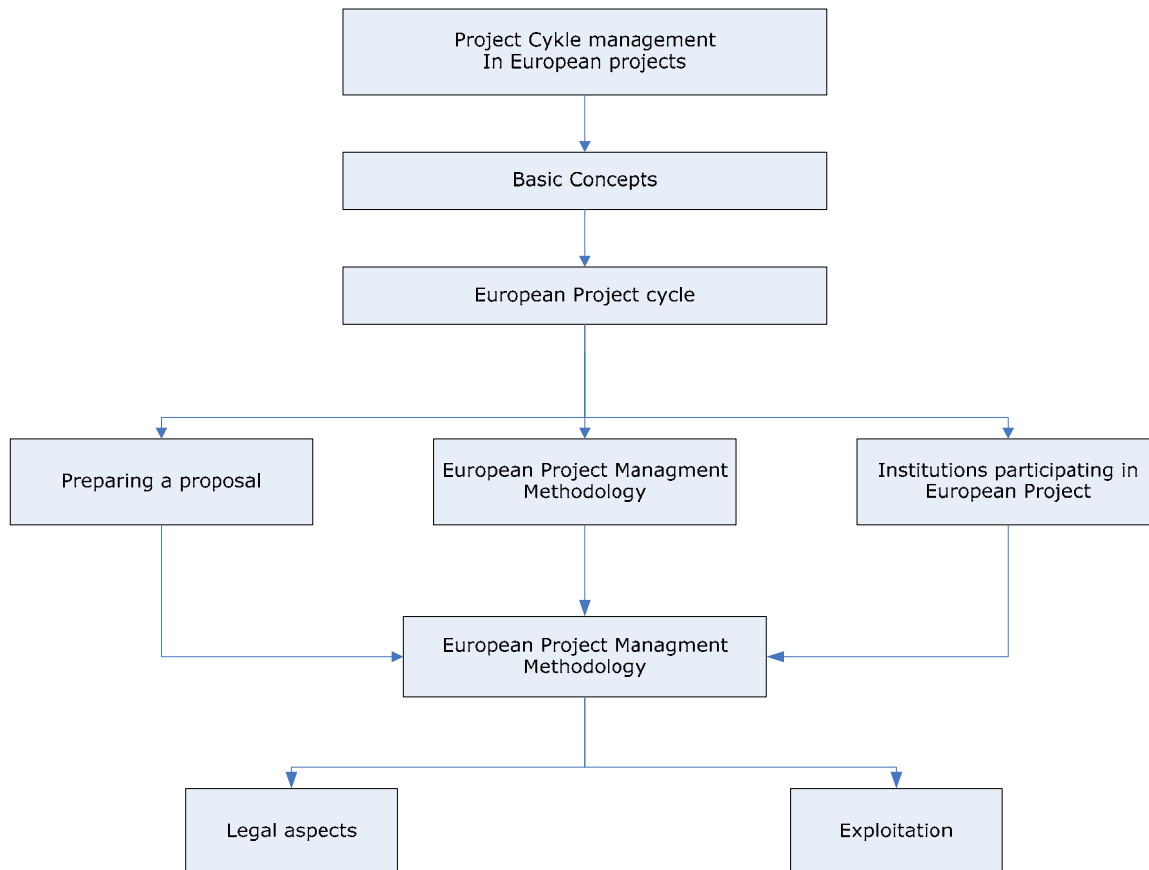
- 4.1. Consortium agreement
- 4.2. Agreement with the CE
- 4.3. Intellectual property rights

### **5. Exploitation:**

- 5.1. Dissemination plan
- 5.2. Business plan

### 3.3. PCM Diagram

Below is the diagram of PCM course Index structure:



### 4. Indication about Beginners and Advanced pathway

There are many ways to organise e-learning courses. It all depends on the structure of the data. Generating paths of learning allows verifying the knowledge and the skills of the student quickly. Using such a method allows mastering the training material in a shorter time than when using traditional methods. This is the innovative method of the training. Individual path in the course is the best way to learn because ready trainings can be adapted to individual goals and personal needs of the student.

To meet the students' needs more efficiently, all the course data must be specified and separated on a beginners and advanced part and then related pathways must be created for them.

These examples show how to do it:



## Example 1

Main course structure: after the end of the beginners part user will start the advanced one. Among the parts a special window will appear with information: "To start the advanced part of the course please click on the button "next" in the corner of the screen". Both parts can be finished with a simple test according to presented knowledge.

## Example 2

If the structure of the data is in a different kind and can't be separated on a beginners and advanced part easily, course has to be built in a different way. All the main pages of the course will be as the main easiest part and the enhanced information will be delivered simultaneously in a many ways. It can be, for example, a simple popup window or hidden page (pages) which shows up when a special button is clicked. It is only used if the student is simply interested in some extra and usually more difficult information.

It all depends on the structure of the materials to the course. For the beginners contest can be prepared as a simple information page, graphic page, easy test's question, etc. All primary definitions can be place in the special lexicon window which will be always available for the user. For the more advanced students all information will be built as a hi-tech pages (with popups, crosswords, drag&drop components, radio buttons, check boxes, flash components, audio components, role playing learning components (RPL), special layouts, etc.)

## 5. References and Links

There are lots of websites which have something in common with Project Cycle Management in European Projects. Below are pointed a few of them.

### For guidelines

[http://ec.europa.eu/europeaid/multimedia/publications/index\\_en.htm](http://ec.europa.eu/europeaid/multimedia/publications/index_en.htm)

### For EU programs

<http://www.e-isotis.org/> <http://www.welcomeurope.com/default.asp?id=4&info=1>

<http://cordis.europa.eu/fp7/>

### For IPR

<http://www.iprguide.com/>

### Link to the 15 thematic agencies of the European Union

[http://europa.eu.int/agencies/index\\_en.htm](http://europa.eu.int/agencies/index_en.htm)

### Council of the European Union

Homepage <http://ue.eu.int>

### Minutes of the Council meeting

[http://ue.eu.int/cms3\\_fo/showPage.asp?lang=en](http://ue.eu.int/cms3_fo/showPage.asp?lang=en)



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### **European Commission**

European business test panel <http://europa.eu.int/yourvoice>

European Commissioners [http://europa.eu.int/comm/commissioners/index\\_en.htm](http://europa.eu.int/comm/commissioners/index_en.htm)

Homepage <http://www.europa.eu.int/>

### **Committee of the Regions**

TED <http://ted.publications.eu.int/official/>

Homepage <http://www.cor.eu>

### **European Economic Social Committee**

Homepage <http://www.eesc.europa.eu>

### **European Parliament**

Homepage <http://www.europarl.eu.int>

### **Legislative observatory**

<http://www.europarl.eu.int/oeil>

### **MEPs database**

<http://www.europarl.europa.eu/members/public.do?language=en>

Parliamentary committees <http://www.europarl.europa.eu/activities/committees.do?language=EN>

### **Information web sites**

Eupolitix <http://www.eupolitix.com>

Euractiv <http://www.euractiv.com>

European Public Affairs Directory <http://www.landmarks-publishing.com/>

laculture.info <http://www.laculture.info>

## **6. Conclusion and recommendation**

Lack of free of charge courses concerning PCM in most of European countries leads to conclusion that the impact should be significant (especially on PDA and mobile technologies). Even more significant impact is expected in countries where EU funds for development is a biggest chance for financing their projects.

The e-learning methods of study in Europe are still more and more popular. In eastern countries e-learning is less popular but BONy project is a good way for the eastern countries people to become familiar with this kind of education. On Internet we can find a lot of courses, but not everything is free of charge and also they are not in good quality.