



EvalUE guide on inclusion in the Erasmus+ programme

Evaluator Perspectives

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Guide to the evaluation of inclusion in Erasmus+ applications and projects



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A word from the President of EvalUE

Already present in the Erasmus+ 2014-2020 programme, inclusion is one of the fundamental principles of the Erasmus+ 2021-2027 programme. The inclusion of vulnerable groups is a major challenge of this new programme that European project leaders are invited to take into account.

This guide has been designed by EvalUE, the Association of Experts and Evaluators of the European Union, to assist these experts in identifying, analyzing and evaluating inclusion in the projects they evaluate. It is also intended for all those involved in education and training who wish to promote the inclusion of all. We hope that this guide will be used to promote and implement inclusion for all.

Viviane Devrièsère



**Preface by Martine Reicherts,
former Director General for Education, Youth, Culture and Sport at
the European Commission,
President of the National Research Fund of Luxembourg Inclusion in
Erasmus**

How many times have I heard: "Erasmus is a programme for academics and for the elite"!

There is no smoke without fire, this criticism is, in part, justified,

The new Erasmus+ programme and this guide attempt to remedy this situation. Only time will tell whether this objective has been achieved. This guide has the merit of setting up avenues for reflection, indicators and good practices, but it does not solve everything.

The very notion of inclusion is almost infinite, the situations multiple!

The French philosopher Paul Ricoeur defined his ethical aim as follows: "A just life, with and for others, in just institutions". Erasmus offers young people the possibility of practicing this just life, with and for others, whatever their nationality, gender, etc. It is up to us, their elders, to ensure that we have just institutions that provide opportunities open to all.

This guide is a major step in that direction and I congratulate its authors! Only a just society can guarantee peace and democracy.

And together we can do it: let's respect the differences, but let's take them into account in our evaluations in Erasmus.

This guide makes proposals, bravo!

And see you in a while for a critical evaluation in the light of field experience...

It is by forging that one becomes a blacksmith.

1. Introduction and background

1.1. Inclusion and inclusive education: converging definitions by UNESCO ¹and European bodies²

UNESCO and the Council of Europe agree on very convergent and complementary general definitions of inclusion and inclusive education.

UNESCO defines inclusion as **a process of overcoming barriers that limit the presence, participation and achievement of learners.**

For the **Council of Europe**, inclusion is an **approach that values diversity and aims at equal rights and opportunities**, creating the conditions for the full and active participation of all members of society.

UNESCO also defines **inclusive education** as the strengthening of the capacity of the education system for all learners, which is shared almost identically by the Council of Europe, which also specifies that it is an essential factor for social cohesion in plural societies.

The term inclusion, which refers to the affirmation of the rights of all persons to have access to the various common institutions intended for all, regardless of their possible particularity³ The term "inclusion", which refers to the affirmation of the rights of all persons to access the various common institutions intended for all, regardless of their particularities, is gradually gaining ground in public, scientific and political language, replacing the term "integration", which gave the right to be similar, tolerating the exclusion of those who were unable to enter the "normal" world on their own, despite all the means of compensation available to them and the assistance of all the appropriate services⁴and even integration services.

Inclusion is one of the objectives promoted in 1994 by the Salamanca Declaration, in the rules for the equalization of opportunities promulgated by the UN in the same year, and in the Luxembourg Charter promulgated in 1996 by the European Union. Inclusion is one of the indicators used by the European Union in the Lisbon Agenda to evaluate public policies.

¹ <https://fr.unesco.org/about-us/introducing-unesco>

²Reminder on the governance arrangements of the European Union
<https://www.touteleurope.eu/actualite/les-institutions-europeennes.html>

³ CHAUVIERE Michel and PLAISANCE Eric, Dictionnaire encyclopédique de l'Éducation et de la Formation.

⁴ LE CAPITAINE Jean-Yves, L'inclusion n'est pas un plus d'intégration : l'exemple des jeunes sourds.

1.2. European Union (EU) Inclusion Strategy

The European Union's Social Rights Framework provides a general framework for inclusion around the three themes of equal opportunities and access to the labour market, fair working conditions and social protection and inclusion.

In its Action Plan for Integration and Inclusion for the period 2021-2027,

The EU has made inclusion one of its key objectives for the next seven years.

This Action Plan promotes inclusion for all, recognizes the important contribution of migrants to the EU and addresses the barriers that may hinder the participation and inclusion of people with a migrant background, both newly arrived and those already holding citizenship, in European society. It is based on the principle that inclusive integration requires efforts from both the individual and the host community and includes new actions that build on the achievements of the previous 2016 Action Plan.

The Erasmus+ programme is part of this strong political orientation of the EU's governing bodies and must contribute to it. The aim is to **promote access to lifelong learning, to encourage citizenship through exchanges, to encourage "ecological" and "digital" transitions⁵ to reduce the risks of fracture and strengthen inclusion among the most vulnerable**. The projects deployed throughout the period must therefore make it possible to reach more people **with fewer opportunities for economic, social, cultural, health and disability reasons, geographical isolation or learning difficulties**.

A new, more inclusive Erasmus+ 2021-2027 programme

Although it has often been held up as an example of successful European collaboration since its inception, the Erasmus+ programme is sometimes criticized for its difficulty in reaching the most disadvantaged groups, the very ones who would benefit most from a mobility stay abroad. Thus, the programme is evolving and tending to become more democratic⁶. The 2021-2027 programming plans to be more inclusive, to reach more learners with difficulties, from disadvantaged backgrounds or far from mobility, as well as to support smaller and less experienced local structures to engage in European projects.

With this in mind, the Erasmus+ 2021-2027 programme makes inclusion one of its three key themes for the next seven years.

⁵ With reference to the programme of the President of the European Commission Ursula Von Der Leyen https://ec.europa.eu/info/sites/info/files/political-guidelines-next-commission_fr.pdf

⁶ <https://agence.erasmusplus.fr/publications/observatoire-erasmus-n10-vers-une-democratisation-et-une-inclusion-reinforcee/>

Assessing inclusion in Erasmus+ applications: new challenges

With the strengthening of the inclusive dimension in the new programme, the members of EvalUE must enrich their knowledge of inclusive education, appropriate the definition proposed by the European Commission and supported by their country, and develop new methodologies to better take into account this priority. This increased awareness of the challenges of inclusion will enable them - among other things - to further refine the evaluation of applications in a harmonized manner.

1.3. Erasmus+ evaluators and their profiles

Erasmus+ evaluators are selected by the National Agencies (decentralized actions) or directly by the European Commission (centralized actions). They all have a clear knowledge of the field, experience and expertise in their respective sectors and in mobility in the broad sense. They are responsible for evaluating the applications submitted in response to the programme's calls for proposals. They are selected - among others - for:

- their experience of mobility,
- their project management skills,
- their experience and expertise in their respective sectors,
- their knowledge of mobility-related issues,
- their capacity for objectivity, analysis, synthesis and writing.

1.4. The EvalUE Association

EvalUE is the association of experts and evaluators of the European Union and the Erasmus+ programme. It has 165 members (international consultants, general inspectors, academics, inspectors, heads of schools, teachers, etc.) and works in the fields of education and training. The members of EvalUE provide expert advice on European programmes to one or more European agencies.

EvalUE also offers an annual training plan, in which experts from France, Europe and abroad (Erasmus+ Agency, OECD, UNESCO, etc.) are invited to participate.

The Association actively participates in many major European and international events. For example, this year, for the Erasmus days, EvalUE had the great honour of collecting more than thirty contributions from personalities on the theme of inclusion, including that of the 2015 Nobel Peace Prize Laureate, Mr Abdessatar BEN MOUSSA.

1.5. The EvalUE Guide on Inclusion: Working Methodology

With the focus of Erasmus+ 2021-2027 applications and projects on inclusion, new needs emerge for their evaluation.

This guide attempts to respond by providing information, resources, recommendations and examples of good practice. It will integrate European and national guidelines and recommendations (Official Bulletin of the National Education, Youth and Sports¹etc.).

The guide is part of a collaborative effort between Erasmus+ evaluators from EvalUE. Aware of the new challenges of a more inclusive Europe of Education, they have set up **an enlarged working group composed of 21 Erasmus+ evaluators** around inclusion and its evaluation.

They have different profiles that touch the different sectors of the programme (school and higher education, vocational training, adult education, youth, etc.).

Several meetings took place between June 2020 and April 2021, in order to establish the project roadmap and to contribute to the drafting of this guide. In addition to their involvement in Erasmus+ France/Education Training project evaluations, some evaluators carry out evaluations in other European agencies. The group is thus in contact with six other national agencies and the Brussels Executive Agency.

A small working group leads the larger working group. Its function was to draft and manage this guide. The small group has worked regularly on the theme of inclusion in mobility, mainly to

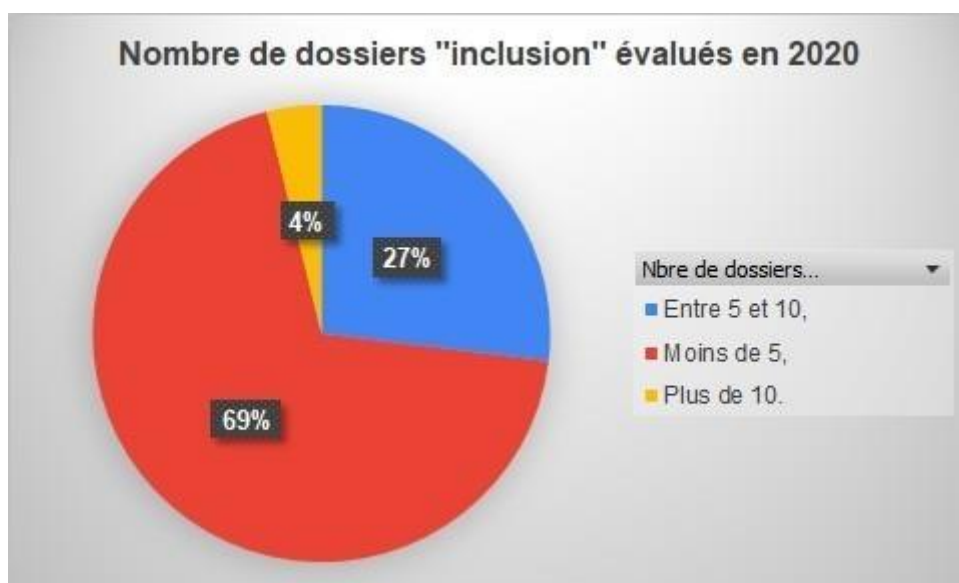
- conduct an empirical review of available literature and research reports,
- provide resources on inclusion for evaluation,
- identify groups under-represented in mobility and the barriers they face,
- to gather the needs of these people who are far from mobility,
- collect feedback, opinions and good practices from other Erasmus+ evaluators,
- suggest recommendations,
- to write this guide on the issue of inclusion to assist Evaluators of EUA,
- expand cooperation with European evaluators from other national agencies.

The Core Group also drew on the contributions and proposals of the evaluators who were members of EvalUE, and designed and submitted a questionnaire on inclusion to them.

¹ <https://www.education.gouv.fr/bo/21/Hebdo16/MENC2111645N.htm>

The 32 questions were divided into three main sections:

- proposals on the content and form of the guide,
- information based on the experience of the evaluators (2014-2020 programming),
- wishes or suggestions to improve the inclusion (2021-2027 programme). The analysis of the answers has helped to enrich and illustrate this guide.



1 Number of files indicated as inclusive by respondents to the EUAQ questionnaire in 2020

2. Inclusion in the Erasmus+ 2014-2020 programme

Different ⁸sectors of the programme, in particular the Youth and Higher Education sectors, have developed strategies, made recommendations and put in place suitable practices and support to facilitate access to quality mobility for the greatest number. From this body of data, we have identified some recommendations around inclusion.

2.1. Inclusion in the youth sector

At the launch of Erasmus+ 2014-2020, the Youth sector⁹ sector established an **inclusion and diversity strategy** for the seven years of the programme, in order to ensure that as many learners as possible with fewer opportunities or from disadvantaged backgrounds have access to it. With regard to the direct selection of applications (and thus the evaluation work), this strategy already recommended a careful assessment of inclusion and diversity.

Recommendations :

- **be aware** of inclusion and diversity,
- **be attentive to the specificities of** the projects,
- **know what specific materials** are needed,
- **know** the "six keys to success"*,
- **apply the concept of proportionality** by taking into account the differences :
 - in the nature and scope of projects,
 - in the experience and capacity of organizations.

Six keys to fostering and achieving inclusion and diversity were recommended:

- **reduce barriers** to reach different groups,
- keep **young people at the center of** the project,
- **to deal with diversity** of any kind,
- use **non-formal learning**,
- **set long-term social change impacts**,
- choose a **holistic approach** and build strong partnerships.

⁸ It is worth recalling that in some countries, the national agencies in charge of the Erasmus+ Youth programme are different from the national agencies in charge of the Erasmus+ Education and Training programme. This is the case in France, where there are two separate agencies.

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2.2. Inclusion in the higher education sector

Internationalization for all

The Academic Cooperation Association (ACA), the European Think Tank on Internationalization of Higher Education, whose members are the national agencies of the Erasmus+ programme, has published a 2019 discussion paper on the theme of 'Internationalization for all? Widening inclusion in the internationalization of higher education'.

The paper notes that some national agencies have already been particularly concerned with widening inclusion in a variety of ways:

- linking internationalization abroad with internationalization activities at home,
- using **multiple** and flexible **formats**, e.g. short-term mobility, more flexible and able to better meet the needs of students who are currently under-represented in mobility, while serving as a "motivator and preview" for longer-term mobility (these new formats complementing, but not replacing, longer-term physical mobility),
- with **complementary approaches** through curriculum and institutional mobility (usually referred to as Transnational Education - TNE), as well as other forms of linking domestic and foreign elements (virtual exchanges and blended learning - COIL modules) to joint curricula at different levels, home-based curricula in English or other foreign languages, summer and winter schools,
- by **adapting the financial conditions to the needs of the target groups**. Grants should be based on the real cost of living in the region and should take into account all access costs (including pre-visits, interpreters, etc.),
- providing **tailored advice and enhanced support services** before, during and after the mobility period such as:
 - assistance with application administration procedures,
 - language courses that meet special access needs (e.g., courses for deaf students going on mobility trips),
 - assistance in booking accommodation,
 - the request for reasonable adjustments,
 - medical and mental health services,
 - access to peer support networks,
 - reintegration assistance, etc.

Inclusion in International Credit Mobility (ICM)

The European Commission has commissioned the SPHERE consortium (University of Barcelona and European University Association) to carry out a study on the implementation of its policy towards disadvantaged students in the framework of the "international credit mobility" of the Erasmus+ programme.

The study focuses on the mobility of outgoing students from three groups of partner countries: Eastern, Southern Mediterranean and Western Balkans. It examines the extent to which the Erasmus+ programme's emphasis on the inclusion of disadvantaged people is addressed by partner countries and by Higher Education institutions active in partnership projects. Based on a body of evidence, the authors formulate findings and propose recommendations.

Summary of the results of this study.

- In order to address inclusion and diversity, the Erasmus+ Programme Guide provides a broad and indicative definition of disadvantage-disadvantaged).
- The definition is far from being supported by the legislation of the countries concerned by this study and by general opinion. In some of them it includes the notion of "special needs", in others it does not. There is very little convergence with the Erasmus+ definition. Even for the most convergent category, "physical disability", there is no unanimously accepted definition in all countries.
- Only a small minority of students reported answering questions to declare a "disadvantaged" situation when applying. With respect to disadvantaged students, the principal members interviewed indicated that the greatest barrier was the lack of appropriate prioritization in the selection process.
- The problem of the lack of consensus underlying the notion of "disadvantage" is fundamental. As long as differences in interpretation persist, it is impossible to estimate the actual number of disadvantaged students whose mobility opportunities under this programme are met - or not. Without an agreed programme-wide definition, partner countries will only accept those aspects of the disadvantage policy that fit their own legal and cultural profiles.

Summary of the recommendations of this study.

All actors should make additional efforts to promote existing opportunities for disadvantaged students. Erasmus+ National Agencies should advise Higher Education institutions on the status of national legislation on disadvantage, advise them on how best to overcome the gap between the national definition and the Erasmus+ definition, and facilitate the development of relevant staff at all levels.

The higher education institutions in partner countries should ensure that in their strategic planning, particular attention is paid to the needs of disadvantaged students. Authorities in partner countries should also consider convening national forums to discuss how to define, encourage, identify and certify disadvantaged students in order to facilitate their mobility.

- The Commission should also consider options to best address the additional financial problems faced by economically disadvantaged people wishing to benefit from the programme (unit costs to cover travel, visas and insurance; eliminating delays in the award of scholarships, etc.). All parties should harness the experience and enthusiasm of alumni in developing policies to integrate the Erasmus definition of disadvantage more effectively into the legal and cultural frameworks of partner countries.

Students with disabilities.

The Ministry of Education of the Flemish Community and the National Centre for Inclusive Education in Higher Education (SIHO) published in November 2020 a research report on inclusive mobility for students with disabilities, in the framework of the European project EPFIME-Establishing a thought-out Policy Framework for Inclusive Mobility across Europe.

In this report, a definition of inclusive mobility, proposed by the Inclusive Mobility Alliance, is used as a working basis (see part 3 on the Inclusive Mobility Alliance). The report points to a lack of clear harmonization of inclusion at European level, a lack of strategic planning for inclusion in mobility projects (both at institutional-local and ministerial-national level) and a crucial lack of knowledge of the barriers to mobility faced by the target audience.

In order to address these issues, the project, which analysed in detail the needs and expectations of 1134 students with disabilities from 114 higher education institutions across Europe and 23 Ministries of Education in the European Higher Education Area (EHEA), makes recommendations for:

- **Erasmus+ higher education institutions, ministries and national agencies**
 - Planning for inclusion in a strategic way. Establishing clear definitions, encouraging actors to set targets and putting in place the means to monitor these targets.
- **All the actors in mobility**
 - Training in the basic concepts of inclusion, and knowledge of - at a minimum - the barriers to mobility faced by the most disadvantaged populations,
 - Clear communication on the support for inclusion offered by mobility programmes, such as Erasmus+,
 - Contributing to their proper implementation in all stages of mobility projects,
 - Facilitating accessibility to the program by taking into account the needs of the learner wishing to go abroad for training.

The Inclusive Mobility Alliance: definition of inclusive mobility and recommendations for 2021-2027

The alliance defines **inclusive mobility** as follows:

"Inclusive Mobility" means creating and ensuring adequate conditions to learn, work, or volunteer abroad for people with fewer opportunities, by addressing their diverse support needs. It is a needs-based approach to what the individual beneficiary needs to ensure a safe and exciting mobility period abroad.

It is important to not generalize needs, needs are specific and the individualized aspect of it is highly important. What the person/beneficiary says they need is what they should receive they should receive"¹⁰.

Key elements to identify inclusive mobility according to this study:

- **fair and equal access** to the Erasmus+ programme,
- **clarity of the inclusive mobility project,**
- **individualized support for the person,**
- **autonomy** of the person going abroad,
- **understanding of needs,**
- **evaluation and monitoring** of mobility,
- **information/training/awareness-raising for project leaders and experts,**
- inclusion of all within **a universal design for learning,**
- implementation **of adequate communication and information facilities and effective structures** to address accessibility and inclusion issues.

¹⁰ "Inclusive Mobility means creating and ensuring adequate conditions for learning, working or volunteering abroad for people with fewer opportunities, by providing support for their diverse needs. It is an approach based on the needs of each beneficiary to ensure a safe and interesting period of mobility abroad. It is important not to generalize the needs, which are specific and individualized and what the person/beneficiary says he/she needs is what he/she should receive.

2.3. Disadvantaged groups : barriers encountered

An outline of a typology of disadvantaged and/or under-represented learners/people and common barriers to mobility was drawn up. This information was cross-checked against the following documents :

- the Erasmus+ Programme Guides 2014-2020 and 2021-2027,
- various research reports on inclusion in mobility programmes,
- the questionnaire responses to the Evaluators of Evaluate.

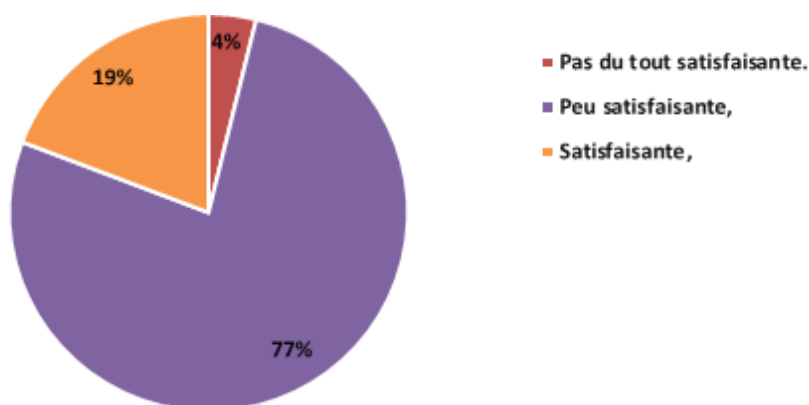
This typology is developed in chapter 3.1.3: Priority "Inclusion and diversity". It also incorporates the elements of the new 2021-2027 programme.

2.4. EvalUE evaluators' views on the place of inclusion in the files evaluated

In filling in the questionnaire, the EvalUE evaluators agreed that the notion of inclusion is complex to define in a European context, as its interpretation can be different in different countries. This finding supports the reports on TINs (EUA) and on inclusive mobility (EPFIME) which already pointed to the lack of a uniform definition of inclusion and of different disadvantaged groups.

Thus, in the 2014-2020 programming, the evaluators interviewed testify that inclusion was sometimes announced as a desire, a willingness to intervene in this area by project leaders, but that it was difficult to find precise and concrete elements in the application file.

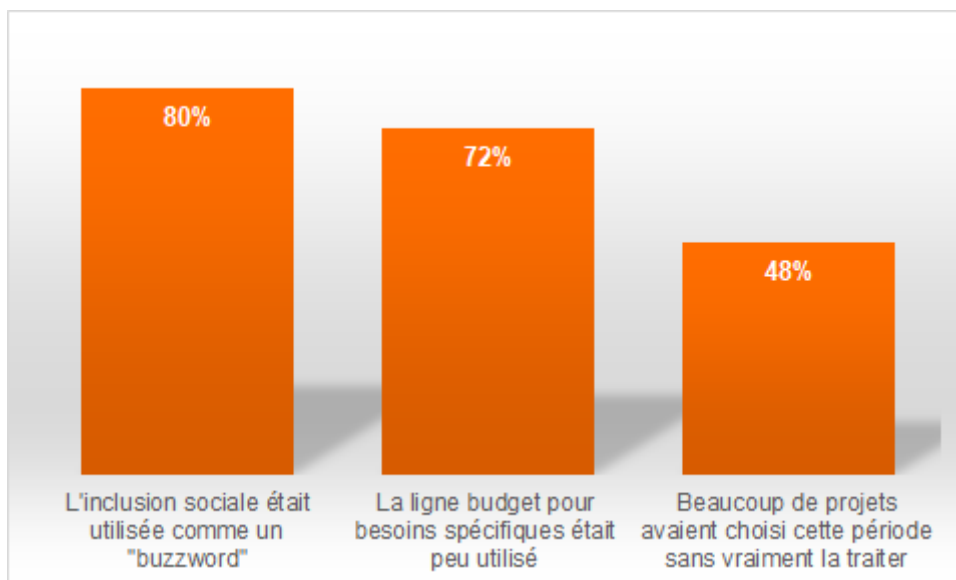
Overall, in the projects evaluated, the evaluators consider that inclusion was handled in a way that was: not very or not at all satisfactory 80.7%, satisfactory 19.2%.



2 - Treatment of inclusion in the projects evaluated. Only one answer possible. Results expressed as percentages.

The recurring problems most often encountered by the evaluators interviewed during their evaluations were :

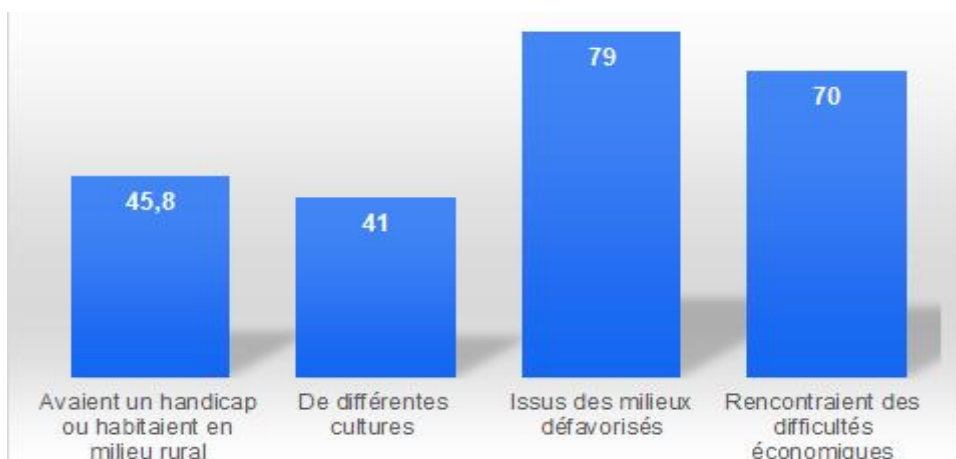
- the term inclusion is used as a buzzword (80%),
- the budget line for specific needs is little used (72%), many projects choose this priority without really addressing it (48%)



3 - Most recurrent problems in Erasmus+ projects in terms of inclusion. Several choices possible. Results expressed in percentages.

According to their responses to the questionnaire, the evaluators interviewed most often found applications for audiences with the following barriers

- from disadvantaged backgrounds (79%),
- experiencing economic difficulties (70%),
- with disabilities (45.8%),
- living in rural areas (45.8%),
- of different cultures (41%).

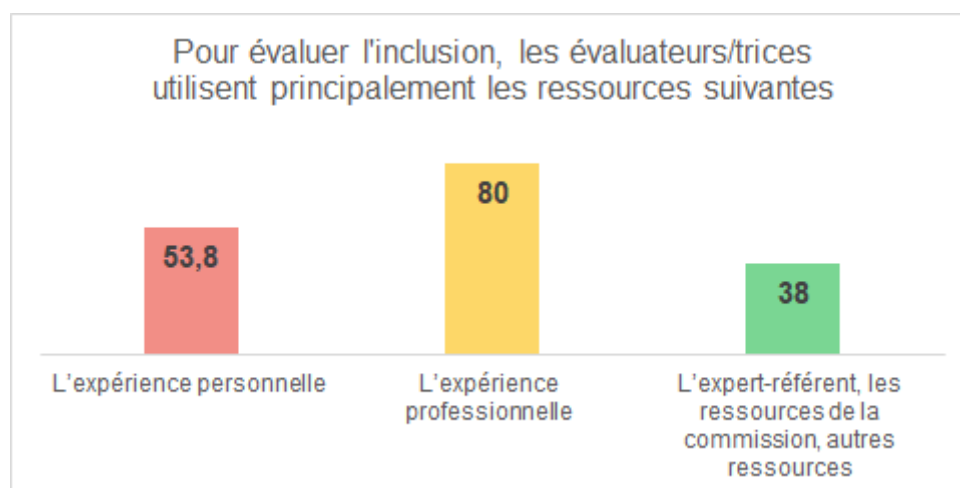


4 - Target audiences most often encountered in projects evaluated in 2014-2020. Several choices possible. Results expressed in percentages.

With regard to the final reports of the projects, the results of the questionnaire indicate that inclusion seems to be little present and little valued by the project leaders.

2.5.EvalUE evaluators' views on the need for support in evaluating inclusion in Erasmus+

In order to assess inclusion throughout the 2014-2020 period, the evaluators interviewed drew on the documents provided by the Erasmus+ national agencies, their personal and professional knowledge and their experience of assessing inclusion. Where the function of a Lead Expert exists, how, for example, in France, the evaluators also called upon these resource persons to assist them in their understanding of inclusion.



5 - Materials/resources that have helped to assess inclusion in Erasmus+ projects. Several choices possible.

Results in percentages.

For the period 2021-2027, the evaluators interviewed would like to see inclusion better defined and illustrated in the documents accompanying the implementation of the Erasmus+ programme.

In particular, they propose to illustrate with a precise definition, with examples of good practice, the indicators that can be used to identify projects that promote inclusion. This information could be adapted to each sector according to the target audiences.

To improve the evaluation of inclusion, evaluators would like to benefit from "tools" as follows :

- a document on inclusion in Erasmus + projects,
- examples of good practice,
- practical sheets on specific needs.

2.6. Inclusion in the "Erasmus+ Observatory"

A study on "Mobility triggers among vulnerable groups" was carried out and published by the "Erasmus+ Observatory" of the Erasmus+ France/Education Training Agency. The results are included in Fact Sheet N°. 13 of the new "Inclusion Series" published in September 2020. In the editorial, the Director of the Agency, Ms. Laure Coudret-Laut, puts this study in context and specifies in particular the challenges of inclusion in the Erasmus+ 2021/2027 programme.

This study is based, on the one hand, on the analysis of the pathways of some thirty vulnerable learners from higher education and vocational education and training who have completed an Erasmus+ mobility project. It is also based on the testimony of experts in the field and project leaders who are involved in supporting these groups.

The main obstacles encountered, both because of problems in France and on arrival in the host country, are of various kinds:

- **economic obstacles** (e.g.: "having to give up a student job in France, difficulty finding a job in the host country..."),
- **psychosocial barriers** (e.g., "fear of leaving your loved ones, but also fear of not being able to adapt to the host country"),
- **obstacles related to housing** (e.g. "fear of leaving one's home in France and not finding one upon return and fear of not finding housing in the host country").

The learners interviewed suggest four courses of action to make Erasmus+ more accessible to all audiences:

- an increase in **the level of scholarships**,
- **increased communication** with the various stakeholders in the organization of mobility,
- **networking for the exchange of experiences** with learners who have already gone on a mobility,
- **better adaptation of the language tests** to the level of the learner and the duration of his/her mobility.

2.7. Key tips

The following advice is based on the readings and summaries made by the EvalUE Inclusion restricted and extended working groups and on the inclusive practices carried out during the setting up of Erasmus+ projects or during expertise realized by their members for the Erasmus+ Agencies.

- Read carefully the definitions of inclusion proposed by the European Commission and the Erasmus+ Programme Guide (for France: BOEN 2021).
- Download the guides available in the Commission's resource area European Union, Erasmus+ Agencies, etc.
- Use the Erasmus+ Agencies' scoring grid.
- Understand the importance of each item, especially if extra points are awarded for inclusive projects.
- Look in the application for a **definition of inclusion** for the project or for organizations is given.
- Ensure that **inclusion is addressed at all stages of the application**, including the following criteria:
 - Is there an analysis of the needs of disadvantaged groups?
 - Are the candidate selection process and the selection criteria used inclusive?
 - Is the preparation for mobility adapted to disadvantaged learners and their specific obstacles?
 - Is the support provided during mobility adequate? Will reasonable adjustments or pedagogical adaptations be offered during the mobility for those who need them?
 - Is adapted assistance offered to disadvantaged people to return after their mobility?
- Consider whether **the needs of disadvantaged groups** are well defined in the application. Ideally, there should be a good description of the realities and needs of the participants according to the context of inclusion in each participating country. If the project starts from the experiences and analysis of the representations of disadvantaged learners, this is usually a good indicator.
- Check that the **promotion of mobility is carried out directly for disadvantaged groups and in a manner adapted to** their communication needs. It is unlikely that learners with fewer opportunities will spontaneously come forward to study or do an internship/volunteer placement abroad if no concrete effort is made to reach out to them, convince them and support them.
- Evaluate the **pedagogical approach used throughout the project**, from the idea to the final evaluation, and ask whether it is inclusive and takes into account the needs of disadvantaged audiences.
- Consider whether the planned activities will bring **real added value** to these audiences.
- Always ensure the **operational dimension of inclusion** through tangible elements present in the application:
 - presence of a budget line for specific needs,
 - special support for participants from disadvantaged backgrounds,
 - proposal of a linguistic or intercultural preparation,
 - presence of an accompanying person,
 - presence of an expert organization on inclusion in the consortium,
 - adaptation of pedagogical material,
 - etc.

If a request for financial support is made under the special needs budget line, ensure that the reasons for the request are clear and that estimates of additional costs are available (even if the needs are not yet known, they can be anticipated).

2.8. Some elements of analysis proposed by EvalUE to assess inclusion

A non-exhaustive list of some elements of analysis to be taken into account in the evaluation of Erasmus+ applications and projects has been drawn up. It concerns three important stages in mobility and is aimed at different types of less privileged and/or disadvantaged groups.

These elements, derived from readings, existing grids and individual experiences, are given here as an indication. They cannot, of course, be present in every application. It will depend on the individual learner and his/her inclusion needs.

This list can be used by the experts during the evaluation of the applications, but also by the project leader during the development of his proposal, the implementation of his project, but also in his final report to be submitted to the national agency.

Elements of analysis proposed by EvalUE to assess inclusion in an Erasmus+ application, according to the type of public concerned and the stages of the project

Type of audience	Before mobility	During mobility	After mobility
	<i>The candidate has</i>	<i>The candidate has</i>	<i>The candidate has</i>
Common to all disadvantaged audiences.	- established inclusive and responsive selection criteria - provided for communication between the actors	- programmed inclusive activities adapted to the identified needs - provided for personalized and adapted support	- developed tools to assess inclusion - provided a promotion of good inclusive practices

	- organized respectful procedures - requested specific financial support (budget line: support for inclusion) and encouraged the mobility of disadvantaged people		
Disability Learning disabilities Special needs	- Identified participants with special needs - proposed an individualized implementation with adapted objectives, activities and evaluations - ensured accessibility at all stages of the project - provided special and reassuring support with identification of the contribution of key actors (associations of disabled people, school nurse, psychologist, etc.) - designed logistical support adapted to the pedagogical, linguistic and intercultural preparation - established a medical record and translation and adapted the duration of the mobility to health	- provided a specific support - anticipated access to housing, health care, recreation, etc. - provided travel assistance - programmed pedagogical adjustments (e.g. adaptation of courses, exams, etc.) - translated useful forms - translated and harmonized the medical record	- identified good practices E+PRP platform for results
Economic barriers	- planed a connection with a social worker or social workers - adapted pedagogical, linguistic and intercultural preparation	- provided suitable accommodation - provided financial	- identified good practices among partners

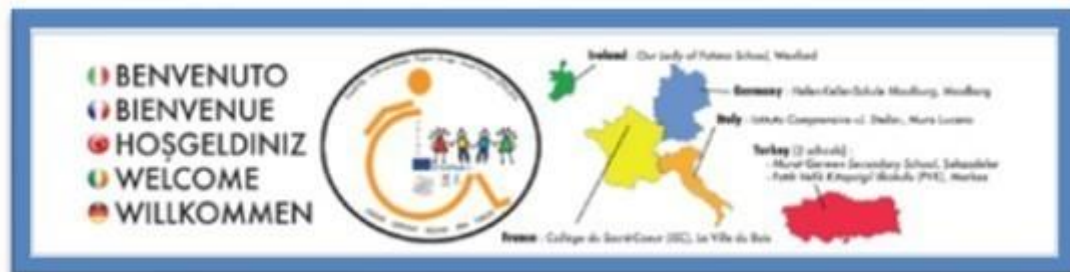
	- identified and mobilized municipal, departmental and other financial assistance	help for all associated costs	- disseminated the good practices observed
Cultural differences	- made the information accessible - carried out the necessary procedures - established links with a social worker - adapted to the pedagogical and linguistic and intercultural preparation	- informed the host partners of the situation - planned for developments	- Identified and disseminated the good practices
Social barriers	- made the information accessible - established a relationship with a social worker - adapted pedagogical, linguistic and intercultural preparation	- sought support, including financial support - designed tools to ensure autonomy - provided for the provision of homes	- Identified and disseminated the good practices
Geographic barriers	- made the information accessible	- provided for personalized support	- identified and disseminated the good practice

2.9. Some remarks on inclusive projects and an example of good practice

Here are some remarks and an example of good practice identified by the EvalUE evaluators:

- projects involving pairing or mentoring between participants to provide peer support for the most disadvantaged learners,

- projects working in close cooperation with structures that provide social, medical or legal support for disadvantaged learners,
- an example of good practice: the D.I.R.E.S. strategic partnership project
Key Action 2 on Health and Disability.



Project D.I.R.E.S.: DISABILITY, INCLUSIVE SCHOOLS, RESPECT, EUROPE, SOCIAL DIALOGUE

- ❖ PROJECT TYPE: School Strategic Partnership Project (Key Action 2)
- ❖ TARGET GROUP: Pupils in primary and secondary education, special and ordinary
- ❖ OBJECTIVE: To develop the inclusion of pupils with special and ordinary needs in Europe

The ERASMUS+ DIRES (Disability, Inclusive schools, Respect, Europe, Social Dialogue) project created a strategic school partnership (Key 2) with English as the language of communication and the aim of inclusion for all. Six partner schools in five countries, one primary school from Turkey, two secondary schools from France and Italy and two special schools from Germany and Ireland carried out learning mobilities in their schools over a two-year period.

The 198 one-week mobilities in Europe were attended by 114 pupils aged 8 to 17 (54 special needs pupils and 60 ordinary pupils), and 84 staff.

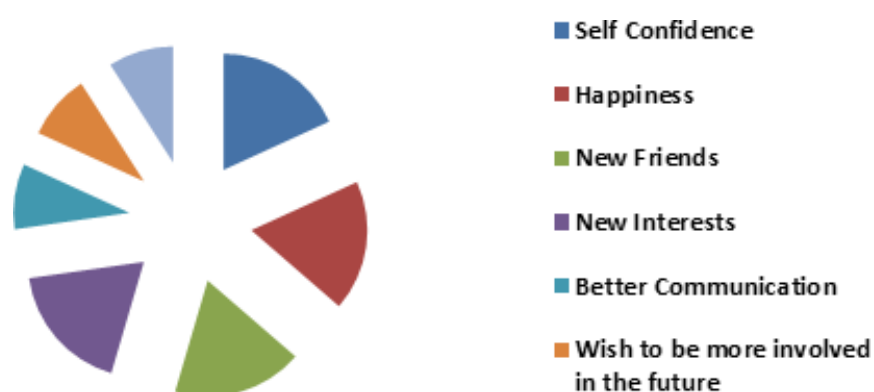
The activities were carried out in mixed inclusive workshops (ages, skills, disabilities, languages), focusing on the shared practice of art, cooking, interculturality, multilingualism, music and sport.

This rich educational programme, with a variety of fun activities, was designed in consultation with the staff of the six schools (head teachers,

teachers, special needs teachers, AVS, administrative staff). They mobilized to exploit their complementary skills and make the program accessible to all participants.

The D.I.R.E.S project and its mobility activities have represented important added values by encouraging, during two years, the living together of all these young students from Europe.

The evaluation of the benefits, made by the pupils of the six schools, highlights their increased confidence, happiness, discovery of new friends and new interests. The meetings also facilitated communication and reinforced the desire for greater involvement.

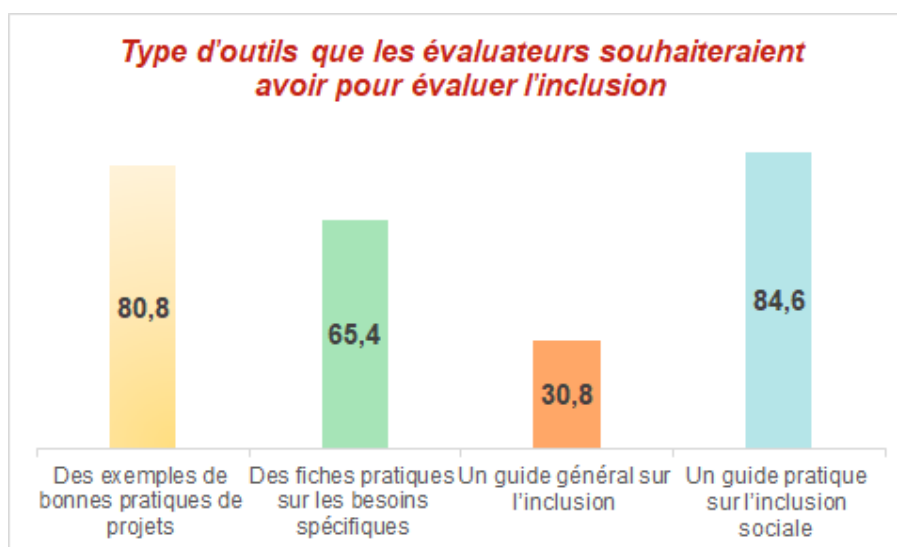


The students enjoyed this unforgettable experience. Their great fatigue did not change their good mood!

Great	Love	Friendly	Good mood
Exciting	Fun	Excellent	Happy
Unforgettable	Cheerful	Fantastic	Tired
New	Interesting	Cool	Share

In conclusion, all the students from the five schools expressed their wish to meet again and say: “ We would love to go back and meet everyone again. Thank you Erasmus+ ! ” .

2.10. EvalUE's recommendations based on the 2014-2020 experience



6 - Tools and resources desired by evaluators to assess inclusion. Multiple responses possible.

Results expressed as percentages.

Evaluators interviewed in 2020 who participated in the EvalUE Inclusion Working Group expressed needs in terms of tools and desired resources.

The evaluators also made a number of recommendations:

- **take into account a definition of inclusion**, addressing evaluators from **various horizons**,
- clarifying inclusion vs. social inclusion,
- explain more clearly the term **horizontal priority**, associated with inclusion,
- **systematically add extra points for inclusive projects** in all Erasmus+ Agencies (national and executive) with clear communication to evaluators,
- have **precise, dedicated reference materials available for evaluation**,
- include inclusion in a school project **as a long-term priority**,
- Develop a **list of criteria** that make a project inclusive,
- ensure **an inclusive architecture** for all projects, regardless of subject matter or objectives.

Some of the evaluators interviewed expressed the feeling that the Erasmus+ programme seems a little "elitist". In its practical implementation by project leaders, the programme still too often acts as a supplement for already privileged groups.

For the 2021-2027 programming period, the evaluators would like to see more projects with people as **priority target audiences**:

- from economically disadvantaged backgrounds (80 %),
- of different cultures (72 %),
- with disabilities (64 %),
- from rural areas (52 %), with social barriers (48 %)

3. Inclusion in the Erasmus+ 2021-2027 Programme Guide

The EvalUE Inclusion Working Group offers some thoughts based on its readings, experiences and a first reading of the new Erasmus+ Guide.

3.1. Inclusion Assessment Practices

Introductory remarks

As this guide is being written, the Erasmus+ programme guide and the service note of 15-4-2021MENJS - MESRI - DREIC relating to the Call for proposals for the school and university year 2021/2022 ¹² have just been published.

The first evaluations under the new programming period start in mid-May 2021. Therefore, the following "recommendations/advice" are mainly based on a first reading of the Erasmus+ Guide.

Erasmus+ 2021-2027: "a new programme philosophy". First commented reading of the inclusion in the Erasmus+ 2021-2027 programme

(This part is based on the French version of the guide, version of 08/04/2021).

For ease of reading, we have selected some parts of the guide concerning inclusion and offer a "perspective" as an EvalUE evaluator.

The new philosophy of the Erasmus+ 2021-2027 programme, by including a strategy of inclusion and diversity, aims to strengthen the accessibility of the different actions, the quality of the projects and the participation of a larger number of organizations and participants. Erasmus+ should thus contribute to a more diverse and inclusive Europe of education and living together.

The way inclusion is taken into account in the Erasmus+ programme is changing. As a result, in the Erasmus+ 2021-2027 programme strategy axis, inclusion and diversity become the priority of the programme. Each programme country must design and develop its own plan to achieve these objectives by facilitating the participation of more organizations that have never applied before, and participants that are more representative of the diversity of learners¹³.

¹² <https://www.education.gouv.fr/bo/21/Hebdo16/MENC2111645N.htm>

¹³ National plans should be available soon.

Inclusion: general philosophy

- **10 million¹⁴** European mobilities (as many as in the last 30 years) with a **total budget doubled to €23.4 billion**,
- **Accessibility** to organizations and participants with fewer opportunities,
- **Qualitative impact** to contribute to more inclusive and cohesive, greener and digitally enabled societies,
- Promoting equal opportunity, access and equity,
- **Inclusion and diversity as a priority**,
- **Inclusive strategy, mechanisms and resources in the programme, in applications and in European projects**,
- **Development of inbound mobility, including the hosting of experts or personnel for training.**

Some new features are identified in the new programme.

- **The priority given to inclusion and diversity**, the first of the four Erasmus quality standards. The activities supported must **respect these standards in terms of the concrete implementation practices of** the project tasks (selection, preparation, definition, evaluation, recognition of achievements, sharing of results),
- Inclusive financial supports:
 - **additional support**: package for participants with fewer opportunities,
 - **Specific support**: 100% of the eligible costs corresponding to the specific needs of certain participants in the mobility (agreement of the Erasmus+ Agency and supporting documents for travel, subsistence, accompanying persons, adapted equipment, etc.),
- **Possible preparatory visits** (staff, learners with fewer opportunities),
- **The concrete involvement of the participants in the important decisions** during the whole the project (preparation-implementation-monitoring of activities-evaluation), in order to maximize the beneficial effects),
- **Flexibility in the duration of the mobility for learners with fewer opportunities with the possibility of short mobilities, the minimum duration being two days**,
- **New short project formats** to make the programme more accessible to smaller, less experienced structures and participants with fewer opportunities.

¹⁴ <https://agence.erasmusplus.fr/documents-de-presse/budget-nouveautes-erasmus-2021-2027/>

Priorities of the Erasmus+ programme¹⁵

From the very first lines of this new programme, a European institutional strategy, centred on inclusion and diversity, the first of its four priorities¹⁶ is affirmed. The objective of this strategy is "to contribute to removing barriers that hinder access to the opportunities offered by the programme for different target groups in Europe and the rest of the world".

Inclusion is the key to achieving the general and specific objectives of the European Union in education, training, youth and sport. It should be reflected in the actions implemented, both at the level of the project promoters and of the learners and target groups.

This will is strong because inclusion is found at different levels, and words or expressions come up several times: "having fewer opportunities", "supporting", "making accessible", "access to information", "reaching the greatest number", "particular need of the individual" ... Inclusion is developed in detail and repeated in each action and for each sector.

Inclusion and diversity" priority

The Erasmus+ Guide provides a non-exhaustive list of potential barriers. It aims to provide a reference tool for taking steps to improve accessibility for people with fewer opportunities and for making representations to them" (p.7- 8):

- **Disabilities and/or health problems:**
 - physical, mental, intellectual or sensory disabilities,
 - serious, chronic or any other illness,
 - situation related to physical or mental health.
- **Educational difficulties linked to education and training systems :**
 - difficulties in achieving success in education and training systems,
 - failure to take into account individual needs in learning or training programs abroad,
 - early school leaving, lack of employment, lack of training (NEET), lack of qualifications.
- **Cultural/linguistic differences encountered by people:**
 - with an immigrant or refugee background, in particular migrants,
 - belonging to a national or ethnic minority,
 - with difficulties in language adaptation, cultural inclusion, etc.
 - using sign language.

¹⁵ See pages 7-11 of the guide in French.

¹⁶ See page. 4: "Increasing opportunities for a wider range of participants and organizations...More inclusive and cohesive societies".

- **Social barriers at different levels:**
 - limited social skills,
 - anti-social, high-risk behaviour, marginalisation,
 - difficult family situation (first in the family to access Education
 - (e.g., supervisor, single parent, caregiver, breadwinner or orphan, living in an institution).
- **Economic barriers :**
 - low standard of living, low income, precarious situations, homelessness,
 - learners having to work to support themselves,
 - dependence on the welfare system, long-term unemployment,
 - costs of travel abroad for accompanying persons of participants with fewer opportunities.
- **Barriers related to discrimination :**
 - Discrimination on the basis of gender, age, ethnic origin, religion, belief, sexual orientation, disability or other factors. Possible combination of two or more of the barriers mentioned.
- **Geographic barriers related to location:**
 - remote or rural areas, small islands or peripheral/extreme regions,
 - urban suburbs,
 - poorly served (limited public transport) or less developed areas of third countries, etc.

As a reminder, the new program guide identifies participants as follows:

"Individuals are the primary target group for the program. However, the programme essentially comes into contact with these individuals through the organizations, institutions, bodies or groups that organize such activities. The conditions of access to the programme therefore concern two types of actors: "participants" (individuals taking part in the programme) and "participating organisations" (a term that includes informal groups and self-employed people¹¹). For both participants and participating organizations, the conditions for participation depend on the country in which they are based" (p. 32).

Further on, the **guide defines the characteristics of a person with fewer opportunities:**

"This is a potential participant whose personal, physical, mental or health-related conditions are such that participation in the mobility project/action would not be possible without additional support" ... "For these participants, financial support may therefore be higher than the maximum amounts of individual grants" (p. 65).

Through the guide, **different measures are recommended** to the establishments, adapted to the different sectors, **in order to favor the accessibility of these audiences with fewer opportunities.**

- **Equal and equitable access and opportunities** for participants (learners and staff)
- Inclusion of **participants with fewer opportunities,**

- Involvement **of participants in key decisions** to ensure maximum impact,
- **Inclusive internal selection procedures** :
 - consideration of inclusion and diversity, equity,
 - assessment of merit, motivation, personal development, learning needs of participants,
- **Banalization of periods reserved** for mobilities,
- **Possibilities of mixed mobility.**

Design and implementation of accessible and inclusive project and mobility activities,

- Establishment of inclusion officers in institutions to :
 - define communication strategies,
 - contribute to awareness,
 - provide support throughout the mobility period in cooperation with the colleagues concerned,
 - encourage cooperation among staff members with expertise in inclusion.

To facilitate the implementation of the inclusion and diversity priority, the EU calls on the various partners and institutions to contribute to the implementation of projects, from their conception to their valorization (p. 20-30).

The Erasmus+ Programme Guide states that National Agencies shall:

- ensure that projects are as inclusive and diverse as possible,
- develop "inclusion and diversity plans" to address the needs of participants with fewer opportunities,
- support organizations working with target groups.

SALTO Resource Centers will support Agency staff and grantees to:

- ensure the promotion and deployment of inclusion and diversity measures,
- facilitate access to information on these measures, gather knowledge,
- develop and implement capacity-building activities.

The European Executive Agency for Education and Culture (EACEA) will play a key role in :

- manage centralized actions related to inclusion

EU Delegations and Erasmus+ National Offices (ENOs) will contribute to:

- bring the program closer to the target groups of the strategy.

Advice to Evaluators EUE

To be familiar with these different organisations involved, in order to identify, during the evaluation, whether the candidate has made appropriate use of them for the preparation and implementation of the project, and/or to be able to make recommendations, and to specify references to be consulted, to improve the current or future project

3.2. Description of the actions (p. 15-19)

Key Action 1: Learning mobility of individuals (p. 40-p. 176)

Overview

- Mobility project for students and staff in Higher Education
- Erasmus+ accreditation in the fields of Vocational Education and Training (VET), School Education and Adult Education,
- Mobility of VET learners and staff,
- Mobility of pupils and school staff,
- Mobility of learners and adult education staff,
 - Accredited projects (regular applications - consortium),
 - Non-accredited projects (new applicants-short term).

The Erasmus+ Guide states

Actions supported under this Key Action1 are expected to have a positive and lasting impact on their participants and the participating organizations involved, as well as on the strategic systems in which these activities take place.

The guide also explains

The activities supported in this action should also produce one or more of the following results for the participating organizations

- Improved ability to work at European/international level,
- Improved management skills and internationalization strategies,
- developed cooperation with partners in other countries,
- Increased financial resources allocated (other than EU funds) to organize European/international projects,
- Improved the quality of preparation, implementation, monitoring and follow-up of European/international projects.

Details are provided to promote accessibility to the programme and to promote inclusive mobilities, depending on the sector.

Higher Education Sector

In addition to the long-term physical mobility experiences, **more flexible physical mobility formulas** are proposed so that the programme is **accessible to students from all backgrounds**, regardless of their origins, personal situation and course of study (p. 43).

Vocational Education and Training Sector

In line with the Erasmus quality standards, organisations supported under the programme must ensure that the mobility opportunities they offer are accessible to participants from all backgrounds in an **inclusive and equitable way** (p. 85).

School Education Sector

Participating organisations **should actively promote inclusion and diversity, environmental sustainability and digital literacy** through their activities, taking advantage of the specific funding opportunities offered by the programme for this purpose, raising awareness among their participants, sharing good practice and choosing an appropriate design for their activities (p. 100).

Adult Education Sector

Short-term mobility projects for learners and staff offer a simple and easy way to exploit the potential of the Erasmus+ programme. Their purpose is to enable organisations to plan a small number of activities and gain experience of the Erasmus+ programme (p. 121).

Key Action 2: Cooperation between organisations and institutions

Actions supported under this Key Action 2 must make a significant contribution to the programme priorities, have a positive and lasting impact on the participating organisations, on the political systems in which the actions take place, and on the organisations and individuals directly or indirectly involved in the activities organized (p. 177).

Overview

The Erasmus+ Programme Guide proposes **two forms of cooperation projects**:

- Cooperation partnerships
- Small scales partnership project

The simplified partnership projects are designed to broaden access to the programme for small-scale actors and hard-to-reach people in the fields of school education, adult education, vocational education and training, youth and sport (p. 208).

Objectives of the action

- **Attracting first-time applicants, less experienced organizations and small actors and widening their access to the programme.** These partnerships should enable them to take a first step towards cooperation at European level.
- **Support the inclusion of target groups with fewer opportunities (p. 208).**

3.3. Advice to EvalUE Evaluators for Key Actions 1 and 2

Compared to the previous programme, there are few major changes in general and in the structure of the 2021-2027 programme.

But there are some important changes regarding inclusion.

1. **Take into account the broadening of the notion of inclusion** (see list above), the importance of diversification and above all the implementation of this priority.
2. **Be aware that the notion of inclusion is changing in scale** and that its implementation is becoming more precise in practice.
3. **Integrate the principle of inclusion and diversity from the beginning of the evaluation.** Whereas in the previous programme it was hoped that project leaders would ensure the participation of all the learners in the group and use the "financial tools" to help their participation, the new programme **seems to be more upstream and from the project design stage.**
4. **Encourage and enhance the participation of new structures**, usually "involuntarily" excluded from Erasmus+ funding, as well as of unrepresented groups that could benefit the most.
5. **First, be familiar with the issues and resources offered by the program** in terms of inclusion and diversity in the sector being evaluated.
6. **Identify, in the application, the needs of the organisation and all its audience and check their coherence with the proposed mobility activities.**
7. **Formulate constructive recommendations and mention references to consult.**
8. **Take particular account of the principle of proportionality**, especially for first-time and/or inexperienced applicants.
9. As other possibilities of exclusion may exist, it could be useful **to identify how the project approach was implemented by the applicant and how it was able to take into account "invisible barriers" to participation.**

Advice to EvalUE assessors when evaluating an application:

1. Check the evaluation logic to be adopted and the correct understanding of expectations. At the beginning of the programme, the evaluation evolves (due to the transition year), both in terms of content (new priorities) and form (new printed material, new platforms, etc.).
2. Make sure that you are familiar with the Erasmus+ programme, the European and national reference documents (**BOEN, for France**) in the Erasmus+ fields, depending on the sector of intervention (e.g. "digital education action plan", "inclusion and diversity strategy", "European reference framework of key competences for lifelong learning", etc.), the sector of intervention and its link with inclusion.
3. Download the reference documents.
4. Identify the specificities of inclusion in your sector of intervention.
5. Participate in or view EvalUE's inclusion training.
6. Please refer to the reference sheet attached to this guide.

Specificities for simplified partnership projects to assess the implementation of inclusion and diversity

Expectations identified for small scales project leaders

As simplified mobility and partnership projects are an instrument of inclusion and accessibility to the programme for first-time applicants and less experienced organisations, the level of information required in the completion of the application will be simplified, while ensuring relevance, quality of project design and follow-up actions, and respecting the EU financial provisions.

Therefore, the project description must include:

- the needs of the organization and the individuals,
- the objectives,
- the proposed activities,
- the expected results and their sharing.

The needs, objectives, activities and planned and shared outcomes must be clearly linked to each other and presented in a coherent manner.

Applications shall also include a general timetable for the implementation of the project indicating the expected date of achievement of the main milestones.

The applicant must provide sufficient budgetary information to enable the evaluators to assess the relevance of each activity, as well as the coherence of each activity with the others (p. 214).

Expectations for the implementation of an "inclusive evaluation strategy" for Key Actions 1 and 2

- Put into practice the inclusion and diversity strategy recommended by the European Commission and the National Agency,
- evaluate in a new logic of inclusion, diversity and valorization,
- keep, at the same time, the rigor in their evaluation work, but also a flexibility, an "openness" to encourage first-time applicants who are probably less used to the design and draft of European projects in the framework of the new priorities.

4. Perspectives

This guide is only one element of the EvalUE action for inclusion. It was initiated before the publication of the Erasmus+ 2021-2027 programme guides and the BOEN. The contribution of EvalUE's member evaluators has made it possible to start a capitalization of evaluators' experiences in this field.

At a time when the first evaluations of the new programme are beginning, this guide will be part of a new phase of a working group enriched by the initial feedback from the evaluations underway in the various sectors.

In addition, EvalUE has also initiated work on other programme priorities, including sustainable development and eco-citizenship.

All of this work will make further contributions to the success of the objectives of the new 2021-2027 programming, with each programme contributing more to the creation of a Europe of Education and Training for All.



5. Bibliography

Reference documents analysed for the production of this guide.

Erasmus+ Inclusive Mobility

- Recommendations of the Inclusive Mobility Alliance for a more inclusive Erasmus+ programme
- Inclusive Mobility Report - Making mobility programmes more inclusive for students with disabilities
- EUA study on International Credit Mobility for disadvantaged students
- ACA Reflection paper on internationalization for all
- UUKi study on widening participation in UK outward student mobility
- Strategy for inclusion and diversity in the Erasmus+ youth sector
- Erasmus+ Observatory - Mobility triggers for vulnerable groups
- Background paper on Inclusive Mobility in the EHEA - PLAR4SIMP project

Summary sheets of the main documents above have been produced by the working group. These are available to EvalUE and evaluators in a shared online folder.

To go further on inclusive education :

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6. Contributors/Acknowledgements

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EvalUE

