

Number

Date of Postmark

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SOCRATES PROGRAMME

Application Form for Full Proposals

Please tick the ERASMUS activity to which this application is addressed:

NEW PROG
(maximum duration of the project three years)

NEW MOD
(maximum duration of the project two years)

- -1-2004-1- - ERASMUS -

CLOSING DATE FOR SUBMISSION: 1 MARCH 2004
(as per postmark)

Applications bearing a postmark after this date will not be considered.
Applications must be sent by post. Applications sent by fax or e-mail will not be accepted.

The original application and 4 copies thereof are to be sent to:

Socrates, Leonardo and Youth Technical Assistance Office
Rue de Trèves / Trierstraat 59-61
B-1040 Brussels

Important instructions and information regarding the application and selection procedure

- Before completing the form, please read the relevant sections in the *SOCRATES Guidelines for Applicants* and the *SOCRATES General Call for Proposals 2004*, which contain additional information on closing dates and specific priorities for that year. Please also read the *Administrative and Financial Handbook for Applicants for Transnational Cooperation Projects* before completing Section 2 on the budget. All of these documents can be obtained from the Socrates, Leonardo and Youth Technical Assistance Office at the address below. Further information can also be found on the SOCRATES website: <http://europa.eu.int/comm/education/socrates.html>
- If the grant requested under this application exceeds 300,000 euros, the application must be accompanied by an external audit report produced by an approved auditor, unless the applicant is a public body or a secondary or a higher education establishment. The external audit report shall certify the accounts for the last financial year available and give an assessment of the financial viability of the applicant.
- In accordance with the Financial Regulation applying to the Community Budget, the Commission reserves the right to request additional information or documents for verification of the financial capacity of the applicant.
- The form must be completed in one of the 11 official languages of the European Union. These are marked with an asterisk (*) in Annex 1. Please note that all participating institutions must confirm in writing their agreement to the application as submitted. It is therefore suggested to use as application language a language which is common to the partnership.
- The application must be typewritten or word-processed using a computer, character size 11 pt minimum.
- The original of the application must bear the original signature of the person legally authorised to sign on behalf of the coordinating institution and the original stamp of this institution, if applicable.
- The signed original and 4 copies thereof must be sent in the same envelope.
- A copy of the application must be sent by 1 March 2004 to the appropriate National Agency in each of the countries which are participating in the project (in case of Lingua I, II; Grundtvig I, I.1; Comenius II.1). The copy must be accompanied by a translation of Section 1 Point 2 and Section 4 of the form, if this is requested by the National Agencies concerned. The list of National Agencies appears in the *General Call for Proposals 2004*. It is also available from the above-mentioned website and from the Socrates, Leonardo and Youth Technical Assistance Office at the address below.
- All applications will be acknowledged.
- Applications will be judged against the eligibility and quality criteria set out in the *Guidelines for Applicants* and the *General Call for Proposals 2004*.
- Applicants will be notified about the outcome of the selection in writing in late July 2004. A copy of the notification letter will be sent to the National Agencies concerned.
- In accordance with standard Commission practice, the information provided in your application may be used for the purposes of evaluating the SOCRATES programme. The relevant data protection regulations will be respected.

Any questions relating to this proposal should be addressed to the

Socrates, Leonardo & Youth Technical Assistance Office

Rue de Trèves / Trierstraat 59-61

B-1040 Brussels

Telephone: + 32 2 233 0111

Fax: + 32 2 233 0150

e-mail: info@socleoyouth.be

SECTION 1 - IDENTIFICATION

1. Project title

Please use a maximum of 12 words; start with an acronym or abbreviation, if applicable.

Molos: Master on Libre (Free, Open Source) Software

If necessary, please provide a translation either in EN, FR or DE of the project title.

2. Summary of the project

Please identify clearly, in a maximum of 200 words, the following aspects of your project: Objectives, Target groups, Main activities and Expected outputs.

If your application is successful, this summary will be used as the description of your project and will therefore be part of your contract.

This is a proposal for a master's programme within the Bologna framework, to be offered jointly by several universities across Europe. The subject of the master's will be "libre (free, open source)software", a field which has received little attention in higher education courses, but which is attracting increasing attention throughout Europe. The design of the curriculum not only provides the needed education on this field, but also explores ways of translating into education some practices that the libre software community has long demonstrated in the areas of quality assurance, collaboration among geographically distributed groups, creation of texts by communities of authors, etc. The course development also explores new directions in mixed learning practices, both in-place and distance, combining intensive teaching of theoretical and practical topics.

To fulfill the commitment expressed in this proposal, we have assembled a solid group of universities, with a multidisciplinary team of people already active in the libre software community, with a good knowledge of it, and with extensive pedagogical experience and an interest in education about libre software topics.

Applies only for ERASMUS:

Please identify how the project contributes to the aims and priorities described in the European Policy Statement of your institution and - if possible - of the other partner institutions, submitted with the application for the Erasmus University Charter.

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3. Duration and languages

Please indicate the total duration for which you are applying for a grant. The contractual period is likely to start on 1/10/2004.

Duration	
<input type="checkbox"/> 12 months <input type="checkbox"/> 24 months <input checked="" type="checkbox"/> 36 months	
Language in which you would like the grant contract to be issued	
1st preference <input type="checkbox"/> DE <input checked="" type="checkbox"/> EN <input type="checkbox"/> FR	2nd preference (language in which you would like a translation of the contractual package) <input type="checkbox"/> DA <input type="checkbox"/> DE <input type="checkbox"/> EL <input type="checkbox"/> EN <input type="checkbox"/> ES <input type="checkbox"/> FI <input type="checkbox"/> FR <input type="checkbox"/> IT <input type="checkbox"/> NL <input type="checkbox"/> PO <input type="checkbox"/> SE
Language in which you would like correspondence with the Commission to be conducted <i>(to facilitate cooperation with your partners, you are advised to enter the language most commonly used for communication within the partnership)</i>	
1st preference <input type="checkbox"/> DE <input checked="" type="checkbox"/> EN <input type="checkbox"/> FR	2nd preference <input type="checkbox"/> DA <input type="checkbox"/> DE <input type="checkbox"/> EL <input type="checkbox"/> EN <input type="checkbox"/> ES <input type="checkbox"/> FI <input type="checkbox"/> FR <input type="checkbox"/> IT <input type="checkbox"/> NL <input type="checkbox"/> PO <input type="checkbox"/> SE

4. Financial support from the European Community

Please note that according to the new financial regulation applicable to the general budget of the European Communities, **one project may not receive more than one grant from the budget of the European Communities to any one beneficiary.** In other words, if you are to be selected to receive a Socrates grant for a given project, you must not receive a grant from another Community programme for the same project and funding period.

Has the proposal, or any aspect thereof or any larger project to which it may belong, already been supported in the past by the European Community?

<input checked="" type="checkbox"/> No
<input type="checkbox"/> Yes. Please specify the programme, date, type of activity (e.g. preparatory visit) and, if possible, contract number(s):

Is this proposal, or any aspect thereof or any larger project to which it may belong, currently being supported under the SOCRATES Programme or some other European Community programme?

No

Yes. *Please specify the programme, date, type of activity (e.g. preparatory visit) and, if possible, contract number(s):*

Is this proposal, or any aspect thereof or any larger project to which it may belong, currently the subject of any other application for support from the European Community?

No

Yes. *Please specify the programme(s) and provide details under Section 2 Table 2.*

5. Coordinating institution (= Participating institution No 1)

To fill in this part, please use the type of institution codes, country codes and region codes indicated in Annex 1.

5.1 Legal Representative

This is the person entitled to sign the agreement.

Full legal name of the institution in the national language	Universidad Rey Juan Carlos		
Acronym of the institution, if applicable	URJC		
Full name of the Institution in English (formal or informal translation)	Rey Juan Carlos University		
Country code	ES	Region code	ES3
Type of institution code	EDU4	Erasmus ID code, for Higher Education Institutions only	E MADRID26
Website	http://www.urjc.es		
Legal representative of the institution: Last name First name			
Department/Unit			
Official function within the institution			
Legal address of the institution Street & Street Number Post Code & Town Country			
Phone (including country and area code)			
Fax (including country and area code)			
E-mail			
Is the institution able to recover VAT?			

Participating institution No 3

Full legal name of the institution in the national language	Universitat Oberta de Catalunya						
Acronym of the institution, if applicable	UOC	Erasmus ID code, for Higher Education Institutions only, if available					
Full name of the Institution in English, if possible	Open University of Catalonia						
Department/Unit	Estudis d'Informatica i Multimedia (Computing and Multimedia Department)						
Type of institution code	EDU.4	Country code	ES	Town / City	Barcelona	Region code	ES51
Contact person	Function: Lecturer		Male (x) Female ()				
	Family Name: Megias		First Name: David				
Phone (including country and area code)							
Fax							
E-mail							
Website	http://www.uoc.edu						
Is the institution able to recover VAT?							

Participating institution No 4

Full legal name of the institution in the national language	Universidad Politécnica de Madrid						
Acronym of the institution, if applicable	UPM	Erasmus ID code, for Higher Education Institutions only, if available			E MADRID05		
Full name of the Institution in English, if possible	Technical University of Madrid						
Department/Unit	Departamento de Lenguajes y Sistemas Facultad de Informática						
Type of institution code	EDU.4	Country code	ES	Town / City	Madrid	Region code	ES3
Contact person	Function: Associate Professor		Male (x) Female ()				
	Family Name: Seoane		First Name: Pascual				
Phone (including country and area code)							
Fax							
E-mail							
Website	http://www.upm.es						
Is the institution able to recover VAT?							

Participating institution No 5

Full legal name of the institution in the national language	Université Paris IX – Dauphine						
Acronym of the institution, if applicable	Dauphine	Erasmus ID code, for Higher Education Institutions only, if available					
Full name of the Institution in English, if possible	University of Paris-Dauphine						
Department/Unit	IMRI						
Type of institution code	EDU.4	Country code	FR	Town / City	Paris	Region code	FR1
Contact person	Function: Professor		Male (x) Female ()				
	Family Name: DALLE		First Name: Jean-Michel				
Phone (including country and area code)							
Fax							
E-mail							
Website							
Is the institution able to recover VAT?							

Participating institution No 6

Full legal name of the institution in the national language	École Nationale Supérieure d'Électronique Informatique et Radiocommunications de Bordeaux						
Acronym of the institution, if applicable	ENSEIRB	Erasmus ID code, for Higher Education Institutions only, if available			F Bordeaux 11		
Full name of the Institution in English, if possible	ENSEIRB						
Department/Unit	Computer Engineering						
Type of institution code	EDU.4	Country code	ES	Town / City	Talence	Region code	FR61
Contact person	Function: Associate professor		Male (x) Female ()				
	Family Name: Pellegrini		First Name: François				
Phone (including country and area code)							
Fax							
E-mail							
Website	http://www.enseirb.fr/						
Is the institution able to recover VAT?							

Participating institution No 7

Full legal name of the institution in the national language	Universite Denis Diderot						
Acronym of the institution, if applicable	Universite Paris 7	Erasmus ID code, for Higher Education Institutions only, if available			FPARIS007		
Full name of the Institution in English, if possible	University of Paris 7						
Department/Unit	UFR d'Informatique						
Type of institution code	EDU.4	Country code	FR	Town / City	Paris	Region code	FR1
Contact person	Function: Professor		Male (x) Female ()				
	Family Name: Di Cosmo		First Name: Roberto				
Phone (including country and area code)							
Fax							
E-mail							
Website	http://www.urf-info-p7.jussieu.fr						
Is the institution able to recover VAT?							

Participating institution No 8

Full legal name of the institution in the national language	Frei Universität Bozen – Libera Università di Bolzano						
Acronym of the institution, if applicable	FUB-LUB	Erasmus ID code, for Higher Education Institutions only, if available					
Full name of the Institution in English, if possible	Free University of Bolzano-Bozen						
Department/Unit	Facoltà d'Informatica						
Type of institution code	EDU.4	Country code	IT	Town / City	Bolzano	Region code	IT31
Contact person	Function: Assistant Professor		Male () Female (x)				
	Family Name: Russo		First Name: Barbara				
Phone (including country and area code)							
Fax							
E-mail							
Website	http://www.case.unibz.it						
Is the institution able to recover VAT?							

Participating institution No 9

Full legal name of the institution in the national language	Facultade de Engenharia da Universidade do Porto						
Acronym of the institution, if applicable	FEUP	Erasmus ID code, for Higher Education Institutions only, if available					
Full name of the Institution in English, if possible	School of Engineering of the University of Porto						
Department/Unit	Department of Physics						
Type of institution code	EDU.4	Country code	PT	Town / City	Porto	Region code	
Contact person	Function:		Male (x) Female ()				
	Family Name: Villate		First Name: Jaime				
Phone (including country and area code)							
Fax							
E-mail							
Website	http://						
Is the institution able to recover VAT?							

Participating institution No 10

Full legal name of the institution in the national language	University of Lincoln						
Acronym of the institution, if applicable	Lincoln	Erasmus ID code, for Higher Education Institutions only, if available			LINCOLN05		
Full name of the Institution in English, if possible	University of Lincoln						
Department/Unit	Department of Computing and Informatics, Faculty of Applied Computing Sciences						
Type of institution code	EDU.4	Country code	UK	Town / City	Lincoln	Region code	UKF3
Contact person	Function: Professor		Male () Female (X)				
	Family Name: Boldyreff		First Name: Cornelia				
Phone (including country and area code)							
Fax							
E-mail							
Website	http://facs.lincoln.ac.uk/Research/People/cboldyreff.html						
Is the institution able to recover VAT?							

Participating institution No 11

Full legal name of the institution in the national language	University of Salford						
Acronym of the institution, if applicable	NA	Erasmus ID code, for Higher Education Institutions only, if available			UK Salford01		
Full name of the Institution in English, if possible	University of Salford						
Department/Unit	Information Systems Institute						
Type of institution code	EDU.4	Country code	UK	Town / City	Greater Manchester	Region code	
Contact person	Function: Lecturer		Male (x) Female ()				
	Family Name: Fletcher		First Name: Gordon				
Phone (including country and area code)							
Fax							
E-mail							
Website	http://www.isi.salford.ac.uk						
Is the institution able to recover VAT?							

Participating institution No 12

Full legal name of the institution in the national language	Høgskolen i Agder						
Acronym of the institution, if applicable	HiA	Erasmus ID code, for Higher Education Institutions only, if available			N-KRISTIA01		
Full name of the Institution in English, if possible	Agder University College						
Department/Unit	School of Management, Department of Information Systems						
Type of institution code	EDU.4	Country code	NO	Town / City	Kristiansand	Region code	NO04
Contact person	Function: Assistant Professor		Male (x) Female ()				
	Family Name: Gailis		First Name: Janis				
Phone (including country and area code)							
Fax							
E-mail							
Website	http://www.hia.no/english/						
Is the institution able to recover VAT?							

SECTION 2 - BUDGET

General instructions

- Before completing this section, please read carefully the *Administrative and Financial Handbook for Applicants for Transnational Cooperation Projects*.
- The budget should cover the entire period of the SOCRATES grant (one, two or three years). The budget should be coherent with the work plan in Section 4.
- All amounts should be provided in euros.
- Please adhere strictly to the format provided in the tables, and check carefully the figures provided (applications containing calculation errors will be penalised in the selection process).

Table 1 : Overview of expenditure

Type of costs	Costs (€)
1. Staff costs	
2. Direct costs	
2.1 - Travel and subsistence	
2.2 - Equipment and materials	
2.3 - Sub-contracting, consultancy and other external services	
2.4 – Other costs	
Subtotal for Direct costs	
3. General costs	
TOTAL (identical to the total in Table 2)	

Table 2 : Overview of income

Sources	Amounts (€)
1) Grant requested from the SOCRATES programme	
2) Contribution from the regular budget of the participating institutions	
3) Support from public (national, regional, etc) sources, provided specifically for this project	
4) Support from the private sector or foundations, provided specifically for this project	
5) Other sources	
TOTAL (identical to the total in Table 1)	

Specification for Table 2

If income is indicated under items 3), 4) or 5), please specify the source envisaged.

Table 3: Specification for Contribution per participating institution

The reference numbers (No 1, 2, 3, etc.) of the participating institutions must correspond to those used in Section 1, questions 5 and 6 of the application and be grouped by country in the same order as that indicated in Annex 1. Add copies of this present page for the additional participating institutions, if necessary.

All amounts in euros	Total (equals amount in Table 2, item 2)	Coordinating institution (=Participating institution No 1)	Participating institution No 2	Participating institution No 3	Participating institution No 4
Contribution from the regular budget of the participating institution					
	Participating institution No 5	Participating institution No 6	Participating institution No 7	Participating institution No 8	Participating institution No 9
Contribution from the regular budget of the participating institution					
	Participating institution No 10	Participating institution No 11	Participating institution No 12		
Contribution from the regular budget of the participating institution					

Explanation for allocation of grant per participating institution

On what basis do you intend to distribute the SOCRATES grant among the participating institutions?

Table 4 : Specification for Staff costs

The reference numbers (No 1, 2, 3, etc.) of the participating institutions must correspond to those used in Section 1, questions 5 and 6 of the application and be grouped by country, using the same order as in Annex 1. Add copies of this present page for the additional participating institutions, if necessary.

All costs in euros	Total			Coordinating institution (=Participating institution No 1)			Participating institution No 2			Participating institution No 3			Participating institution No 4		
	Total number of days (a)	Average cost per day (b)	Total staff cost (a x b)	Total num ber of days (a)	Average cost per day (b)	Total staff cost (a x b)	Total number of days (a)	Average cost per day (b)	Total staff cost (a x b)	Total number of days (a)	Avera ge cost per day (b)	Total staff cost (a x b)	Total number of days (a)	Average cost per day (b)	Total staff cost (a x b)
Staff by category (*) :															
Staff Category 1(*)															
Staff Category 2(*)															
Staff Category 3(*)															
Staff Category 4(*)															
Total															

(*)Please refer to the International Standard Classification of Occupations (ISCO) as described in Annex 2.

Tables 5 : Specification for Direct costs

- 5.A - Travel and subsistence

Purpose of journey	Number of return journeys (a)	Average costs per journey (€) (b)	Total cost (a x b)
Total identical to item 2.1 in Table 1			

- 5.B - Equipment and materials

In the case of purchase of hardware costing over €1,000 per item, please indicate the depreciation rate. Before completing read carefully section D.2.2 of the explanatory note.

Description	Number of items	Cost of purchase or rent (€)	Usage rate %	Depreciation rate %	Total cost
Servers for installing support software and website					
Equipment for supporting work in the project					
Total identical to item 2.2 in Table 1					

- 5.C - Sub-contracting, consultancy and other external services

Subcontract	Task description	Number of person days (a)	Cost per day (€) (b)	Other costs (€) (c)	Total cost (a x b)+c
Subcontract 1					
Subcontract 2					
Subcontract 3					
Total identical to item 2.3 in Table 1					

- 5.D - Other costs

Description	Number of items (a)	Cost per item (€) (b)	Total cost (a x b)

Total identical to item 2.4 in Table 1			€

Table 6: Subdivision of costs according to workplan

Please use below one of the subdivisions indicated in your workplan table in Section 4.

Indicate here the type of subdivision you choose	Staff Costs (€) (a)	Direct Costs (€) (b)	General Costs (€) (c)	Total (a+b+c)
S1				
S2				
S3				
S4				
S5				
S6				
S7				
S8				
S9				
S10				
S11				
S12				
S13				
S14				
Total identical to the total of Table 1				

SECTION 3 - DECLARATION

To be completed by the person legally authorised to sign on behalf of the coordinating institution.

"I, the undersigned, certify that the information contained in this application, including Section 4 (description) is correct to the best of my knowledge.

The appropriate authorities of all the participating institutions have read and fully understood the application as submitted. They have confirmed in writing their agreement with the application as submitted.¹

I declare on my honour that the institution I represent has the financial and operational capacity to carry out the proposal as submitted and that it does not fall under any of the exclusion criteria listed in chapter II of the *General Call for Proposals 2004*.

I acknowledge that in case of false declarations, administrative and financial sanctions can be implemented against me or the institution I represent."

I am also sending by 1 March 2004 a copy of the present application to the appropriate National Agency in my country (together with a translation of Section 1 Point 2 and Section 4 in the language of this National Agency, if it is not the same as the language of the present application)- applies for Lingua I, II; Grundtvig I, I.1; Comenius II.1. I have arranged for each of the other participating institutions to send to the appropriate National Agency in its country a copy of the present application, together with a translation of Section 1 Point 2 and Section 4 in the language of the National Agency concerned, if this has been requested by the National Agency concerned.

Place: _____ Date / / (day/month/year)

Signature _____ Stamp of the coordinating institution, if applicable

Name and position in capitals

NAME

POSITION

¹ The Commission reserves the right to request a copy of these agreements.

Checklist

The application is completed in full . All questions have been answered .	<input checked="" type="checkbox"/>
Each page has been numbered .	<input checked="" type="checkbox"/>
The budget covers the whole project period, is indicated in euros and has been checked for calculation errors .	<input checked="" type="checkbox"/>
The application has been type-written or word-processed in one of the 11 eligible languages by using the correct application form .	<input checked="" type="checkbox"/>
The original application has been signed in original by the legal representative of the coordinating institution.	<input checked="" type="checkbox"/>
The original and 4 copies thereof are being sent to the Socrates, Leonardo & Youth Technical Assistance Office by post and in the same envelope before the closing date .	<input checked="" type="checkbox"/>
A diskette with an electronic version of the Summary (Section 1 Point 2) is enclosed with the application paper copies.	<input checked="" type="checkbox"/>
The bank details form (annex 3) has been filled in and duly signed in original. ²	<input checked="" type="checkbox"/>
If the grant requested exceeds 300,000 euros and if the applicant is neither a public body nor a secondary or a higher education establishment, an external audit report produced by an approved auditor is enclosed.	<input type="checkbox"/>
The necessary copies and translations are being sent to the National Agency in the country of each of the other participating institutions before the closing date.	<input type="checkbox"/>

² If your application was to be selected and your bank details changed before the issue of the contract, you must inform the Commission about this change urgently in writing. In any case, any such change will lead to a delay in your advance payment.

SECTION 4.– DESCRIPTION ERASMUS 1: ERASMUS CURRICULUM DEVELOPMENT PROJECTS (CD)

Please describe **all aspects** of your project set out below, on **numbered sheets**, using the **same order** and the **same numbering of questions** as given in the questions.

Please respect the maximum length of text indicated, and append **supporting documents** only where these have a direct and material bearing on the application for support.

1. Typology

1.1 Target groups (select one or several items)

- students at undergraduate level – studying for a (first degree e.g. BA, Diploma etc)
- students at graduate level ("master type") (studying for a second degree e.g. MA etc)
- students at doctoral/"PhD" level
- lifelong learners
- others - Please specify:

1.2 Type of programme

This project covers the development of:
(tick one option, please)

- a full first degree programme
- a full second degree programme
- a full third degree programme
- a European module for:
- a first degree programme
- a second degree programme
- a third degree programme

Once developed, the full degree programme will be delivered as:

- a single programme
Single programme delivery implies that the full responsibility for the degree programme lies with only one institution and that there is no award of a joint or double degree
- a joint programme
The development of a joint programme requires agreement on admission procedures, student and staff mobility, course integration, quality assurance mechanisms, recognition of periods of study abroad and the award of a joint or double degree

1.3 Duration of curriculum development project

The full degree programme development covers

- a one year development plus one year implementation
- a two year development plus one year implementation

NB: The development of a European Module covers a two year period consisting of a one year period for the development plus one year for the implementation

1.4 Implementation

In case of joint delivery of the degree programme by partners: please indicate which partners will participate in the joint delivery of the degree programme (minimum number of partners: 3)

NR 1	yes	<input type="checkbox"/>	no	<input type="checkbox"/>
NR 2	yes	<input type="checkbox"/>	no	<input type="checkbox"/>
NR 3	yes	<input type="checkbox"/>	no	<input type="checkbox"/>
NR 4	yes	<input type="checkbox"/>	no	<input type="checkbox"/>
NR 5	yes	<input type="checkbox"/>	no	<input type="checkbox"/>
NR 6	yes	<input type="checkbox"/>	no	<input type="checkbox"/>
NR 7	yes	<input type="checkbox"/>	no	<input type="checkbox"/>
NR 8	yes	<input type="checkbox"/>	no	<input type="checkbox"/>

If relevant which of the partners will award the joint or double degree? (minimum number of partners: 3)

Please indicate if the degree to be awarded is a joint degree or a double degree

NR 1	yes	<input type="checkbox"/>	no	<input type="checkbox"/>
NR 2	yes	<input type="checkbox"/>	no	<input type="checkbox"/>
NR 3	yes	<input type="checkbox"/>	no	<input type="checkbox"/>
NR 4	yes	<input type="checkbox"/>	no	<input type="checkbox"/>
NR 5	yes	<input type="checkbox"/>	no	<input type="checkbox"/>
NR 6	yes	<input type="checkbox"/>	no	<input type="checkbox"/>
NR 7	yes	<input type="checkbox"/>	no	<input type="checkbox"/>
NR 8	yes	<input type="checkbox"/>	no	<input type="checkbox"/>

2. Objectives (maximum 2 pages)

- 2.1 Explain the **rationale** of and the **background** to the project (current situation, previous or preparatory work, the results of any needs analysis undertaken etc.). You may attach appropriate but succinct supporting documents.
- 2.2 Define the concrete **aims and objectives** of the project and describe the ways in which the situation set out under 2.1 above will be changed and the needs set out in 2.1 addressed by the project. If applicable please relate the aims and objectives of the project to the Bologna process
- 2.3 Explain what you consider to be **innovative** about the project (in relation to each of the participating countries, if the situation is different in each of them), namely in relation to defining or building a European dimension.
- 2.4 Indicate, if applicable, the main **pedagogical and didactical approaches** and concepts which will be promoted by means of the project.

2.1 Rationale and background

Libre (free, open source) software is a reality increasingly ubiquitous in the world of computer and software engineering. During the last years, the world of libre software has increased exponentially (doubling in size, according to almost any parameter considered, every 18 or 24 months), and the published studies indicate that this tendency is going to continue in the next years.

The idea of a master on libre software has been discussed for some time in the community of experts on this matter and in the reports for public administrations in different countries [OSS-DK Oct 2002], [OSS-NO Oct 2003], [OSDC-SIDA 2004]. Currently, there is an increasing interest within the IT industry in libre software, while there are still little or no specific studies (in most Universities) specifically focused on libre software. Companies, public administrations and other institutions are demanding professionals (both from computer engineering and other backgrounds) with a solid knowledge on libre software from an holistic point of view (including economic, legal, sociological, computer engineering, and management approaches). As more and more organizations switch to libre software, and it becomes an integral part of the policies of many administrations, more and more specialists on these matters are needed.

Several master programs have already appeared or are being planned in this field, [UOC 2003] [UniPisa 2004] (both at Universities partners for this proposal). Although they are starting to fill a gap in higher education, and offer studies

with great demand, they are not designed as generic master on the matter, with structured and holistic approaches, and they have not implemented with the Bologna framework as a primary concern.

In parallel with them, and under a grant by the Regional Government of Madrid on the exploration of master studies under the Bologna framework, five Universities (all of them also partners in this proposal) drafted [Madrid 2004] the design of a Master's on libre software. This work finished on February 2004; and since the beginning this was conceived as an open project, with contributions from the partner institutions, companies, and the wider libre software community. In addition to a mailing list with more than 30 subscribers, and a web site with information, and open participation about the design, several presentations were made in Brussels (BE), Soissons (FR), and Madrid (ES).

In the last meeting, with 8 Universities represented, it was decided to initiate a follow-on project, with the idea of finally implementing the Master programme around 2006, completely within the Bologna framework, as a joint title, and with common and specific goals (see objectives, below). When this idea was announced, more Universities who had already participated with comments to the design decided to join (thus reflecting the current partnership for this proposal).

Therefore, this proposal looks for funding for an already running design, and the new extended partnership aims to follow on using an open process which would allow more Universities to participate later, or in any case benefit from the designs and other material prepared within this project.

2.2 Aims and objectives

The general objective of the Master's degree proposed in this project is to provide a high quality Master's programme on the subject of libre software within the European Higher Education Area, through the collaborative effort of several universities which will contribute to the project their extensive experience in this field.

More in details, some specific targets are:

- To design a Master's that complements the knowledge and abilities of computer and software engineers (and professionals with related backgrounds) in the Information Technologies with an in-depth exposition of the world of libre software, its unique features and peculiarities, and the new possibilities that libre software offers. It should provide a comprehensive, multidisciplinary education on the libre software.
- To teach it in a common language (English), using academics from several collaborating European Universities, all of them with in-depth experience, expertise and research in libre software.
- To take into account the inputs from well known professionals from companies and institutions with an active interest in libre software, and from the libre software community both in the design and in the implementation phases.
- To make the Master's design as much open as possible, with public discussions, dissemination of reports for comments, and presentations in meetings related to libre software. The design could even be used by other institutions not participating in this project to implement their own version of libre software master studies.
- To use mixed learning (both in-place and distance, with local tuition), by moving all students and educators to a given location during intensive periods, and using collaborative learning tools during the rest of the academic year. When needed, new software will be developed or integrated for supporting the specific needs of the master's design, and all such software will be released under libre licenses.
- To used methods and processes common in the libre software community to improve the quality, such as bug reporting systems and the peer review of materials (in addition to more traditional quality assurance methods).
- All educational materials produced by the master's project will be released under libre licenses
- Translation into languages other than English will be facilitated and encouraged, both by technical means and by releasing materials under suitable licenses.

In short, the main idea could be summarized by: "To let students reach, after successfully following the Master's programme, the level of a person with comprehensive and authoritative knowledge of the libre software world"

2.3 Innovative aspects

The most important innovative aspects of this proposal are:

- The multi- and inter-disciplinarity of the approach, covering economics, sociology, law, management, software development, etc.

- The exploration of open collaboration mechanisms: among students and educators, with external external users of the educational material developed, with other educators interested in the experience, and with the libre software community at large.
- Mobilization of competences from many European Universities (it is currently impossible that a single University has the resources and knowledge for implementing alone the proposed approach).
- This will be the first cooperation of this type in Europe, involving most of the Universities already active in this field.
- The project will contribute to the development and evaluation of new quality assurance mechanisms in the context of higher education.
- The implementation design of the master's will feature new ways of collaborating between educational institutions, and new templates and ways for the implementation of joint degrees, with a novel combination of in-place and distance learning.
- The characteristics of the programme will make it specially suitable for life-long education (with or without official enrollment in the master' programme).
- Exploration of new ways of collaborative production of knowledge and knowledge sharing with the redistribution of all the materials (texts, recordings, student projects, etc.) under libre licenses.

2.4 Pedagogical and didactical approaches

As it has already been detailed, the general approach of the Master's will make use of mixed learning modes. There will be periods of intensive in-place learning, assisted by educators available at the location where students and educators will meet together some weeks every six months; and the rest of the academic period will consist on distance learning supported by telematic tools and by local tutors. In addition, some specific processes of libre software development will be explored as possible pedagogical approaches:

- Collaboration in the preparation and evolution of educational material among several geographically distributed developers, including potentially the students.
- Use of tools like bug reporting systems, control version systems and online chats for the collaboration of distributed groups of students in the learning process (virtual groups).
- Widespread peer-review of the student's work (both by other students, and by any other interested people outside the Master's, by publication over the Internet following the libre software model, e.g. Savannah).
- Work in real projects, such as contributions to libre software projects as a part of the educational process.
- Exploration of new evaluation methods, based in the open peer review already mentioned.

References

SIDA [2004] Open Source in Developing Countries, a report written for SIDA by Sanjiva Weerawarana & Jivaka Weeratunge, Published by SIDA 2004, Can be downloaded from www.sida.se/publications

OSS-DK [Oct 2002] Open Source Software – in E-Government,
http://www.tekno.dk/pdf/projekter/p02_open-source-rapport.pdf (only in danish)

OSS-NO [Oct 2003] Open Source Software in Norway – Status, effects, constraints and motivations,
<http://enorge.org/FileArchive/246/Endelig%20rapport%20Open%20Source%202003112003.pdf> (only in norwegian)

[UOC 2003] Master en software libre, Universitat Oberta de Catalunya (ES), which started in 2003.

[UniPisa 2004] Proposal for a master on open source management,Universita di Pisa (IT), planned to start in April 2004.

[Madrid 2004] Preliminary design of a master on libre software within the Bologna framework. Work done jointly by Universidad Rey Juan Carlos (ES), Universidad Politecnica de Madrid (ES), Universidad do Porto (PT), École Nationale Supérieure Électronique, Informatique et Radiocommunications de Bordeaux (FR), Université Paris Dauphine (FR), under a grant by the Regional Government of Madrid.

[Lincoln 2004] Proposal for a taught Master of Science degree in Open Source Computing,Department of Computing and Informatics, University of Lincoln (EN).

3. Envisaged project outputs (maximum 4 pages)

3.1 Describe the following aspects of the project:

- subject area(s)
- learning outcomes/competencies to be acquired
- structure of curriculum/module
- admission criteria and admission requirements
- structure for student and/or staff mobility
- didactic materials and methodologies
- examination and assessment regulations

3.2 Explain if and how distance learning methodologies will be used.

3.3 Describe the role of each of the institutional partners in the future delivery of the module, the single programme or the joint programme

3.4 Describe the procedures for recognition of those programme components which the students/graduates follow at the partner universities, (use of ECTS/Diploma Supplement),

3.5 In case of development of a full degree programme with joint or double degree award describe in detail the steps which will be taken which will ensure the establishment of joint or double degrees recognised by the institutions and by the relevant national and professional bodies

3.6 In case of development of a full degree programme (with or without award of a joint or double degree) describe the relevant institutional, national, international and/or professional quality assurance mechanisms in relation to the programme: both internal quality assurance mechanisms (and among the partners) and external evaluations by quality assurance agencies

3.7 In case of development of a full degree programme (with or without award of a joint or double degree): explain why students would enrol in this programme? Does the course fulfil a need in society?

3.8 Describe how you will ensure that the module or programme continues after the end of the programme funding (business plan)

3.9 Please note that **at the end of the project period** you are expected to include in the final report a course description based on the following ECTS requirements:

- Qualification awarded
- Admission requirements
- Educational and professional goals
- Access to further studies
- Course structure diagram with credits (60 per year)
- Final test, if any
- Examination and assessment regulations
- ECTS departmental co-ordinator (if known)

Description of individual course units

- Course title
- Course code (if known)
- Type of course
- Level of course
- Year of study
- Semester/trimester
- Number of credits allocated (workload based)
- Name of lecturer (if known)
- Objective of the course (expected learning outcomes and competences to be acquired)
- Prerequisites
- Course contents
- Recommended reading (if known)
- Teaching methods
- Assessment methods
- Language of instruction

3.1 General aspects

- Subject area(s). Multi- and inter-disciplinary, including economy, law, sociology, management, software development, etc.

- Learning outcomes/competencies to be acquired. Decision making on different levels (political, ICT-strategy for public sector, CEO, systems architecture, software architecture, etc.) The idea is that the student enrolling the program will acquire competence for dealing with libre software issues in any environment, according to her previous background.

- Structure of curriculum

. The planned duration of the master will be of 90 ECTS credits (1.5 academic years), of which there will be 30 "core" credits (compulsory), 30 "specialization" credits (elective), and 30 practicum credits. In addition, some credits could be needed before starting the master (depending on background). These additional credits could also be used for adapting to the titles offered by partner Universities (which could therefore offer their own complements to this studies as a part of a master consisting of both the joint master and complements).

. Core credits will include subjects on economy and business models, legal matters, sociology and ethics, development environments and tools, project management, and some detailed multidisciplinary studies of interesting cases.

. Elective credits will provide students with specialized knowledge in some field, and will be prepared by specially recognized people in that field, jointly with professors with good experience, who will later teach the subject.

. Practicum will include participation in libre software projects, collaboration with companies using and developing libre software, institutions promoting it or using it in public administrations, etc. In all cases, the practicum will include a master thesis.

- Admission criteria and admission requirements

. The master program is targeted at computer engineers and other IT engineers, but could also be adapted to other backgrounds such as economists or business administrators.

. The general admission criteria will be best academic cv, but a number of places will be reserved for people with special skills, experience or recognition in the libre software community.

- Structure for student and/or staff mobility

. All professors and students will move twice a year, for several weeks, to a specific location in Europe (which usually will be different in different periods). During this time, intensive, in-place education will take place.

. During the rest of the academic period, students can go back to their Universities, or visit another of the partners. These visits are expected to be more common during the practicum, where students will be more motivated to visit the University where some expert on the matter of their practicum resides.

. Educators are expected to move to the intensive in-place location twice a year, about 8 days in one period and about 3-4 in the other. Therefore, each subject will have two in-place periods of that duration, one at the beginning and the other at the end of the corresponding semester.

- Didactic materials and methodologies.

. It is expected that new materials will be developed for this master, as almost no comprehensive material exists for studies of this kind.

. Partners are committed to elaborate and distribute such a material under libre licences, allowing for distribution, controlled modification and translation. That material will include texts, telematic services and digital recordings of the classes.

. With respect to methodologies, some uses common in the libre software community will be explored for use in education. Among them, open peer review, extensive bug reporting on materials and classes, collaborative distributed work among groups of students, etc.

. During the distance period, distance learning with local support by educators will be used.

. As a part of the project, some more detailed pedagogical guidelines will be explored.

- Examination and assessment regulations.

. Written exams will be performed by students after the second in-place period,

. Continuous evaluation, based on the use and tracking by the telematic tools and on open, peer review will also be used for evaluation.

4. Evaluation and dissemination (maximum 2 pages)

- 4.1 Describe what measures you will take to monitor and evaluate the project and indicate them in the work plan (point 6.5 below)
- 4.2 Indicate the means by which **the outputs** will be **tested** and **assessed** prior to/during their implementation and dissemination
- 4.3 Describe the arrangements planned for **publishing and disseminating** the results and experiences of the project. In particular, describe how the participating institutions will contribute to the dissemination activities. Mention dissemination networks that could make the materials easier to access and obtain for the target group(s) across Europe.

4.1 Measures to monitor and evaluate the project

There will be several mechanisms to ensure the general coordination of the project:

- Continuous synchronization and monitoring of the progress within the project, by using telematic tools (mainly mailing lists and event reporting tools) to ensure that all partners are completely informed about the status of the project.
- Periodic meetings. Five are foreseen (see details in the budget for travel and subsistence).
- Strict control on the deliverables produced (by the coordinating partners).
- In general, a web site will be installed for most coordinating tasks.

In the workplan, several stages (and actions within stages) are specifically dealing with monitoring and evaluation:

- In S4, activity A4.3 will consist on the elaboration of the first version of a quality assurance plan for the master, which will include monitoring and evaluation mechanisms.
- In S6, activity A6.2 will consist on the actual testing of the software platform, with the aim of monitoring its usefulness and problems, in order to fix them.
- In S7, activity A7.2 will monitor the quality of the material developed in A7.1 by using feedback from other parties interested in the development.
- S8 is as a whole a monitoring/testing stage, since its aim is to check whether the designed subjects are of enough quality, and to detect problems with them by delivering them to real students, in a semi-controlled environment.
- S10 is a stage devoted to use the output provided by all monitored activities, and some evaluation that will be done specifically in it, to redesign the master according to the results of that information.
- In S11, activity S11.2 is the quality control and evaluation of the implementation of the master, with the aims of detecting any remaining problem, of monitoring its progress, and of improving its quality as much as possible.
- S12 is a stage devoted to use the output provided by all monitored activities, and some evaluation that will be done specifically in it, to redesign the master according to the results of that information, in what will be the third version of the design.

4.2 Testing / assessment

In addition to these specific activities, every task will be clearly defined, scheduled, and assigned to a group of partners. Every few time (probably three months) a progress evaluation will be done by the coordinator, with the help of all the participants. Deviations from the scheduled plan will be addressed and corrected. Milestones will be set up at certain points in every task, so that progress can be monitored easily.

For each milestone, and at the end of every task, several deliverables will be clearly defined. Those deliverables will be usually project reports (marked in the work plan as "outputs"). The consortium will evaluate in regular progress meetings the availability of those deliverables in due time, and their quality.

In addition, the whole process will also be open to the public, therefore ensuring peer review and external monitoring by third parties, which should help to ensure the quality control of the results of the project.

All the educational material developed by the project will also be evaluated with genuine users in real life educational courses during the test implementation and the first implementation of the whole master in the third year. As a result of these evaluations, corresponding studies will be elaborated as deliverables of the project.

These actions will also help to the dissemination of the results of the project.

4.3 Dissemination

All the materials produced (reports, courseware, recordings) will be made available as libre software / documentation (see details below). In fact, the project is in part aimed at producing a whole collection of material suitable for the delivery of a master on libre software, which any University could use as the basis for implementing their own curricula on libre software.

We shall also evaluate the impact of this project in improving the quality of educational material on libre software, and in designing joint studies on multidisciplinary fields. That will be the source for presentations at conferences, organizing an international workshop on libre software education (one is specifically planned in the budget and work plan), and demonstrations at international events.

The central point of dissemination of the results will be the project web site. This web site will be established and managed by the coordinating partner, as a part of its coordination and management tasks, since it will also be used for exchange of information among the partners of the project, which in a great extent is expected to be public. In addition, the web site will include the following contents and services:

- Information about the goals and plans for the project, including progress reports and most deliverable documents produced during its development.
- Packaged and ready to use educational materials and design documents related to the master, and services oriented to encourage participation in the creation and use of the material.
- Information and services related to the use of the materials produced by the project. These services and information should help to the newcomers to implement their own studies on libre software, and to make their own designs within the European Higher Education Area.

All the software used as a part of the project will be licensed under libre (free/open source) licenses (according to Debian Free Software Guidelines, DFSG, http://www.debian.org/social_contract#guidelines). Educational materials, reports and other documentation will be licensed under GNU FDL, <http://www.fsf.org/licenses/licenses.html#TOCFDL>, The Creative Commons Attribution ShareAlike License, <http://creativecommons.org/licenses/by-sa/1.0>, or a similar license agreed by all partners of the project.

All these provisions should ensure that the results of the project can be easily disseminated and used in real cases by third parties. Of course, that possibilities will be fostered by the comprehensive promotion of the results, specially by telematic means.

5. Partnership composition and contribution

5.1 Provide for the **coordinating institution** and **each of the other institutions participating** in the project, the following information:

- **expertise** of the institution in the field covered by the project and **experience** in cooperation at local, regional, national and trans-national level (Socrates and other). Indicate experience both in content and project organisation.

Provide for the non university partners involved in the project also the following information:

- **type of the institution (legal status in national language** accompanied by an approximate translation into English if possible; short description of main areas and types of activity).
- **size** of the institution in terms of the total number of (a) personnel (absolute numbers and full-time equivalents) and (b) learners (if applicable)

5.2 Indicate which **specific tasks** are to be assigned to each partner institution involved and indicate the number and the profile of **personnel** from within and outside the partnership to be **involved in the project**.

5.3 **In addition** to the formal partner institutions, list any **other institutions** which will participate actively in the project without receiving a Socrates grant (name, address, type of institution, contact person).

5.1 Expertise and other details about the institutions

Coordination institution, Institution No 1 URJC

Personnel: about 650 (including professors and auxiliary personnel)

Learners: about 11,000 students

Universidad Rey Juan Carlos, Móstoles, Spain (URJC) is a major University in the Madrid area and its GSyC (Sistemas and Communications Group) has a long interest in libre software, and a strong relationship with the libre software community. When the GsyC group was previously at Carlos III University, it organized several national seminars and congresses on libre software, including the first Spanish seminar on libre software (with speakers like Richard Stallman, founder of the Free Software Foundation) and the 2nd Hispalinux Congress (the largest Spanish congress on libre software), in 1999. After moving to URJC, the group has continued with its activities related to libre software, with a periodic seminar on libre software and libre software engineering, a PhD course on libre software, etc.

Experience in cooperation. URJC is participating in many research and education programs at the regional, national, European and international levels. In the European educational context, it has participated in Socrates-Erasmus programs with tens of institutions across Europe. It is also participating in the European thematic educational networks on topics like Chemistry or Management of Public Administrations. URJC is also participating in European educational projects like Leonardo DATAPROT, Leonardo NEMANIS, and Minerva Edukalibre. With respect to research, URJC is a participant in several European projects (in the context of V and VI Framework Program, European Science Foundation and NATO grants, or bilateral agreements).

Expertise related to the project. URJC contributes with a solid experience in the study of libre software development. Professors in URJC are teaching the first subject specifically devoted to on libre software in a PhD program, since 2000. They have also organized and taken part in many seminars, courses and workshops devoted to that topic. Since 2003, URJC has been coordinating some exploratory work on an international master on libre software, with a grant by the Regional Government of Madrid.

Core participants:

- Jesús M. González Barahona, professor in Computer Engineering and Telecommunications engineering, started his activities related to libre software around 1991 being a founder member of PDSOFT (later Sobre), the first Spanish group (and one of the earliest in Europe) interested in the study of libre software. Since then, he has carried on several activities in this area, including the participation in working groups on libre software (among them, the Working Group on Libre Software promoted by the DG-INFO of the European Commission (see <http://eu.conecta.it>). Currently, he collaborates with several libre software projects (including Debian, of which he is a developer), participates in associations like Hispalinux and EuroLinux, writes in several media about topics related to libre software, and consults for companies and public administrations on topics related to their strategy on these issues (a well-known case being

the Extremadura Regional Government, on the strategies related to LinEx). His research interests include libre software engineering, and in particular quantitative measures of libre software development and distributed tools for collaboration in libre software projects. On the academic side related to libre software, he has been teaching subjects on libre software since 1999 (the last three years in PhD programs), and coordinated a project for designing a master on libre software financed by the Regional Government of Madrid during 2003 (with the collaboration of four Universities of Spain and abroad).

- Pedro de-las-Heras-Quirós and Vicente Matellán-Olivera, both professors, have a long history of relationship with the libre software community. Both have been promoters of the use and study of libre software in Spain, and have organized and participated in the activities in this area carried out by the GSyC (and already mentioned)

- Gregorio Robles-Martínez, teaching assistant, joined URJC after having worked on libre software research at Fraunhofer FOKUS (Berlin) and MERIT/Infonomics (UM), where he worked on the WIDI survey of libre software developers and the FLOSS project.

Specific tasks:

- Coordination of the project
- Testing and implementation of the curricula
- Study of similar experiences

Institution 2: UAH

Universidad de Alcalá (UAH), in Alcalá de Henares, Spain, is a major University in the Madrid area. The Polytechnic School with more than 5.000 registered students is located on the Campus Universitario. The Computer Engineering Department has research groups in Network Security, Web Technologies, Satellite Technology, Computer Architecture, Computer Animation and Active Networks. Our Operating System Group (gso) has been involved in libre software use as a teaching tool since 1995. The interest of the gso in free and open source software is also shown by the use of these technologies not only for educational purposes but also in daily use and research. Gso has made a Linux port to the ERC-32 architecture (proposed by the European Space Agency) based on the SPARC v7 processor and nowadays is developing several tools to make full test coverage in embedded systems.

Core participants:

- Elena Campo Montalvo works as a Lecturer of the Computer Engineering Department, teaching Operating Systems at the University of Alcalá. She has been involved in the use of the web as a teaching tool for students in the computer field. She is active in the libre software world since 1997 and currently she is interested in libre software engineering and education.

- J. Ignacio García Tejedor received the B.S. degree from the University de Alcalá (UAH). He is now lecturer of the Computer Engineering Department at the University of Alcalá in Spain where his research and teaching activities are in the areas of Operating Systems, Computer Architecture and Embedded Systems. He has participated actively in some research projects in the area of hardware and software on-board satellites such as FUEGO 2 or the development of Linux for the ERC32 computing platform. He is active in the libre software world since 1995 and currently he is interested in libre software engineering and education.

- Óscar García Población works as a Lecturer of the Computer Engineering Department, teaching Operating Systems and Linux administration at the University of Alcalá. He has been involved in the design, programming and implementation of real time systems for industrial control. He is active in the libre software world since 1993 and currently he is interested in libre software engineering and education.

- Sebastián Sánchez Prieto received the B.S. degree from the Universidad Politécnica de Madrid (UPM) and the Ph.D. degree from the Universidad de Alcalá. He is now Staff Lecturer of the Computer Engineering Department at the University of Alcalá in Spain where his research and teaching activities are in the areas of Operating Systems, Computer Architecture and Embedded Systems. He has written several books related to Operating Systems, UNIX and Linux subjects. He has participated actively in several national and international research projects in the area of hardware and software on-board satellites such as SOHO, PHOTON and FUEGO 2. He is active in the libre software

word since 1993 and currently he is interested in libre software engineering and education.

Specific tasks:

- Coordination of the project
- Detailed preparation of selected subjects
- Testing and implemetation of the curricula

Institution 3: UOC

The Universitat Oberta de Catalunya, UOC (Barcelona, Spain) is a distance learning institution which offers 18 official bachelor and engineering degrees, an unofficial degree and several postgraduate, master and PhD programmes. The UOC is internationally recognized as the first institution to offer distanceeducation of university degrees using exclusively the Internet as the basis of the academic activity. Since the early foundation of the UOC, in 1995, its educational system relays on a Virtual Campus platform which allows the students and the lecturers to interact under the condition that no coincidence in either time or space is assumed. Nowadays, more than 25000 students are registered in the different programmes at the UOC. As a result of its contributions to the distance education and e-learning initiatives, the UOC has been awarded with the most relevant international prizes in this field.

Since November 2003, the UOC includes in its educational offer an International Master Programme on Free Software, which is a pioneer initiative in this field. In the first edition, more than 90 students have enrolled this programme. The interest of the UOC in free and open source software is also shown by the use of these technologies not only for educational purposes (free and open source software are extensively used and distributed to our students since 1997) but also in the implementation of the Virtual Campus platform. In addition, several lecturers of this institution have collaborated in free software projects and in the diffusion of free software technologies by taking part in different international and local conferences and meetings.

Core participants:

- David Megias, MEng, PhD, Member IEEE Dr. David Megias achieved the Engineering degree in Computer Science in July 1994, the Master Engineering degree in Computer Science (Advanced Automatic Control) in October 1996 and the PhD in Computer Science in July 2000, all of them by the Universitat Autònoma de Barcelona (UAB). He was an assistant lecturer at the UAB from September 1994 to October 2001. Since October 2001, he is a lecturer at the UOC (Universitat Oberta de Catalunya) with a permanent position. Since October 2002, he is also the co-director of the International Master Programme on Free Software which is currently offered at the UOC (first semester November 2003 - February 2004 with 90 students). His current teaching activities are mostly related to free and open source software and has participated in several forums and conferences concerned with education and free software. His current interests include free software and open source software, security and copyright protection schemes, and process control. He has published several research papers in different international conferences and journals. He has participated in several national joint research projects both as a contributor and as a manager (main researcher). He has also experience in European projects, such as the European Network of Excellence of Cryptology (joint group with the Universidad de Vigo) of the FP6.

- Rafael Macau Mr. Rafael Macau achieved the degrees in Computer Science by the Universitat Politècnica de Catalunya, in Information Sciences by the Universitat Autònoma de Barcelona and Mathematics by the Universidad de Barcelona. Since 2001, he is the Director of the Department of Computing and Multimedia at the UOC, and since 2002 he is also the co-director of the International Master Programme on Free Software which is currently offered at the UOC. He has more than 20 years of experience in managing positions related to Information Technologies (Nelson Taylor Sofres, Organising committee of the Olympic Games Barcelona 1992, INDRA, CIGESA and the Centre of Telecommunications and Information Technologies of the Catalan Government), and was the Director of the computer systems of the Olympic Games which took place in Barcelona in 1992. He has a wide experience in managing and has participated in several forums and conferences related to information and communication technologies.

- Julia Minguillon MEng, PhD. Dr. Julia Minguillon achieved the Engineering degree in Computer Science in 1995, the Master Engineering degree in Computer Science (Digital Communications and Combinatorics) in 1997, and the PhD in Computer Science in 2002, all of them by the Universitat Autònoma de Barcelona (UAB). He has been part of the teaching staff of the UAB since 1995, and he joined the Universitat Oberta de Catalunya (UOC) in 2001. He has been involved in the open software world since 1994. Among other projects, he has helped to develop the progressive

operation mode of the Independent JPEG Group (IJG) library, widely used. He has also participated in the organization of several seminars and courses about open software, programming and other topics. Since 2002, he is the coordinator of an e-learning project (UOC, IBM Espana and Fundacio "la Caixa") which involves the use of structured languages for e-learning environment design and the use of data and web mining tools for studying the navigational behavior of the users of such environments. His research fields are copyright protection schemes, watermarking and fingerprinting, the distribution of multimedia content using structured metadata, and web and data mining for user and system analysis.

- Josep Prieto, MEng Mr. Josep Prieto Graduated in Computer Science at the Universitat Politecnica de Catalunya (UPC) in 1993 and attained a teaching certificate in the Doctoral Course of Computer Science in the Dept. of Computer Architecture DAC-UPC (1996-1998). He is currently completing his doctoral thesis. Since 1998, he has worked as a lecturer within the department of Computer Science and Multimedia of the UOC, and since February 2001 as director of the Technical Engineering for Information Systems programme (ETIS). His line of research principally centers on exploratory and application technology in the field of ICT, and has participated in the wireless, and free software tools for learning in virtual environments projects, and is also a member of the K-riptography and Information Security for Open Networks (KISON) research group. He has participated in the organization of several seminars and courses, about free software (Registered user GNU/Linux #201676).

- Jordi Serra, MEn. Mr. Jordi Serra achieved the Engineering degree in Computer Science in July 1997 and the Master Engineering degree in Computer Science in October 2001 all of them by the Universitat Autònoma de Barcelona (UAB). He was an assistant lecturer at the UAB from September 1997 to July 2002. From July 2002, he is a lecturer at the UOC (Universitat Oberta de Catalunya) with a permanent position. His current interests include free software and open source software, operating systems (GNU/Linux) and copyright protection schemes applied to audio. He is currently carrying out his PhD research on watermarking.

Specific tasks:

- Software platform for distance learning
- Detailed preparation of selected subjects
- Testing and implemetation of the curricula

Institution 4: UPM

The Universidad Politécnica de Madrid as such was 25 years old in 1996 although most of its centres are over a hundred years old, having been founded in the 18th and 19th centuries and existing independently until they were grouped together in the U.P.M. It is no exaggeration to say that much of the history of Spanish technology for over one and half centuries was written by the Schools of Architecture and Engineering of this university, in that for many years some of them were the only schools in existence. Nowadays it has about 40.000 students in 22 centres. Of them, the Telecommunication Engineering School and the Computer Science Faculty are participating in the preparation of the master on libre software.

The General School of Telegraphy was founded in 1913 and in 1920 the qualification of Engineer in Telecommunications was created. Nowadays, with around 2700 students, is one of the most prominent Spanish institutions in the field of Telecommunications and Information Technology. Since 1992 it teaches its students with libre software, and since 2002 it started a PhD course on libre software.

The newest of the centres, the only one to be considered a Faculty, is that of Computer Science. The Madrid Computing Institute was created in 1969 outside the university framework but in 1976 the studies attained university rank and the Madrid Computer Science Faculty was set up which, from its start in October 1977, has formed part of the U.P.M. Nowadays it has around 2600 students.

Core participants:

- Manuel Carro got his PhD in Computer Science from the Technical University of Madrid, where he is currently assistant professor. He has focused his researchwork on logic and constraint programming, specifically in the areas of design and implementation abstract machines for sequential and parallel systems, optimizing compilation, debugging, visualization, and concurrency in logic programming. He is one of the key architects of the Ciao Prolog systems, which stands out as being one of the most flexible and extensible presently available, while retaining very competitive performance and has been downloaded by thousands of programmers worldwide. Ciao Prolog is an Open Source product. He is highly interested in Open Source Software, its use for building and deploying real

systems, and its deep implications in the research model of Computer Science and Mathematics. He is currently the key researcher of an EU-sponsored project studying semi-formal approaches to the selection of OSS components. He has also participated in more than 12 international and 5 national research projects so far, published a good number of papers in international journals, conferences, and workshops, and served as PC member and organizer in a good number of international conferences.

- Joaquín Seoane, born in 1953, is currently an associate professor in the Telecommunication Engineering School of the Technical University of Madrid, teaching several computer science courses, ranging from programming to protocols, distributed operating systems, internet services, databases, systems administration, and free software. He got his telecommunication engineering degree in 1976 and a PhD in 1989, and worked in real time control and supervision companies, but the main professional activity was devoted to the University since 1978. His current interests are distributed systems administration, internationalization and localization, SGML and XML based teaching tools, free software, and low cost telematic systems for less developed regions. Since 2000 is the technical director of the EHAS (Enlace Hispanoamericano de Salud), a program aiming to empower the health sector in isolated rural areas through telematics.

Specific tasks:

- Detailed preparation of selected subjects
- Testing and implementation of the curricula

Institution 5: Dauphine

University of Paris-Dauphine (Paris IX) is one of the leading French universities in economics and in organization and decision sciences. At Dauphine, IMRI has been recognized for several years as a major European team in the economics of technology, knowledge and innovation.

Personnel: 446 lecturers and researchers including 89 full professors.

Learners: 7460 students.

Experience in cooperation: IMRI has notably been a coordinator for several European projects funded under FP4 and FP5, among which projects COLLINE, on collective invention, TIPIK, on technology and infrastructure policy in the knowledge-based economy, and EPIP, on intellectual property rights. Within this spectrum, IMRI has also recently acquired international recognition for its specific expertise on the economics of libre (open-source) software: IMRI is typically a partner in the new FP6 network CALIBRE, lead by the University of Limerick (IRL), and in a new NSF grant lead by Stanford University (USA).

Core participants:

- Jean-Michel Dalle holds a joint position as a researcher with IMRI - University of Paris-Dauphine (Paris IX), where he also lectures in the economics of innovation, and as an Adjunct Professor with University Pierre-et-Marie-Curie (Paris VI). He is also currently Director of Agorinov, a joint incubation program for science-based high-tech start-ups founded by several prestigious higher education institutions in Paris and supported by the French Ministry of Research and by Local Authorities. As an academic, Dalle has been working on the economics of open-source software since 1998. He had originally developed the first analytical and simulation model of technological competition between open-source and proprietary software. Dalle has also been a lead researcher for a RNTL (National Innovation Network for Software Technologies, F) grant dedicated to study the business models and the new industrial organization associated with the emergence of OSS, which involved both economists, computer and social scientists, and practitioners. He is currently continuing his collaboration with Prof Paul A. David (SIEPR-Stanford University, USA, and Oxford Internet Institute, UK) in the context of an US NSF (National Science Foundation, USA) grant, on the development of a simulation model of the allocation of developer efforts in open-source software development. Dalle also works in the context of the RNTL "LibreSource" grant, analysing how software technology transfers between academic communities and private entities could switch to an open-source mode and be supported by a collaborative development platform, and is further involved as a team leader for IMRI-Dauphine in the newly funded EU "CALIBRE" grant dedicated to studies of open-source software. Previously, Dalle had pioneered among economists the use of local interaction models to analyse standardization as an emergent phenomenon of technological competition. Dalle is an alumnus of Ecole Polytechnique and ENSAE, and holds a PhD in economics of innovation.

Specific tasks:

- Detailed analysis of requirements
- All elaboration related tasks
- Accreditation process

Institution 6: ENSEIRB

Ecole Nationale Supérieure d'Electronique, Informatique et Radiocommunications de Bordeaux (ENSEIRB) is an engineering school that also is an active member of Conférence des Grandes Ecoles.

Personnel: 60 lecturers and researchers

Learners: 690 students.

Core participants:

- Francois Pellegrini is associate professor in computer science at ENSEIRB, and currently in a temporary full-time research position at INRIA. He is interested in libre software since the end of the 1990s. He is vice-president of ABUL (<http://www.abul.org/>), the Association of Libre Software Users of Bordeaux, which is involved in major libre software projects such as AbulEdu (<http://www.abuledu.org/>), an integrated libre software environment for schools ranging from pre-school to high-school, and the Libre Software Meeting (<http://lsm.abul.org/>), a five-day-long world-class meeting of libre software developers and activists. Francois Pellegrini has been a co-organiser and the president of the program committee of the first three issues of the LSM (<http://lsm2000.abul.org/>, <http://lsm2001.abul.org/>, <http://lsm2002.abul.org/>) gathered in 2002 more than 500 people from 40 countries of the 5 continents. The 2004 edition of the LSM will take place at ENSEIRB from July 6 to July 10, 2004.

Specific tasks:

- Detailed analysis of requirements
- Testing and implementation of curriculum
- Dissemination

Institution 7: Universite Paris 7

University of Paris 7, in Paris, France, is a major University in the Paris area and is located on the Jussieu Campus together with University of Paris 6.

Personnel: 2300 lecturers and researchers.

Learners: 26000 students

Experience in cooperation:

The campus of Jussieu has a long tradition of contribution to libre software (the file system used on most Linux distributions, named ext2, was born here, for example). The researcher at the computer science department are well known for their work in foundations of computer science, whose applications are always distributed in the form of libre software, but are also very active on the libre source international scene, both on a vulgarisation level (contributing to the explanation and understanding of the libre software phenomenon in international forums), and on a development level (participating in leading projects like XFree).

Core participants:

- Roberto Di Cosmo is full professor of Computer Science in University of Paris 7. He has been in charge of the "Maitrise d'informatique" (4th year on studies) for several years and is now the director of "DEA Programmation", the 1st year of graduate studies of the University (see <http://www.deaspp.pps.jussieu.fr>). Besides being an active member of the research community on formal methods and foundations of computer science, he has written several influential articles on open source and free software, has been invited as an expert in free software issues by several governments (notably Belgium and Italy), and has participated in various successful open source projects (most notably, the DemoLinux project, see <http://www.demolinux.org>, the first full fledged Linux distribution on a Live CD, that he created in 1999). He teaches a course on free software and law in informatics in the year 2004/2005.

- Juliusz Chroboczek is associate professor at University of Paris 7. He teaches courses on networks and operating systems, and besides being a known expert in game semantics, he is a significant contributor to the XFree projects (in charge of fonts, and of the Xvesa tiny X server). He has participated in several conferences devoted to free and open source project over the past years.

Specific tasks:

- Detailed analysis of requirements
- Study of similar experiences
- Testing and implementation of curriculum

Institution 8: FUB-LUB

The Faculty of Computer Science, the third faculty at the Free University of Bozen-Bolzano, began its teaching and research activities in the academic year of 2001/2002. With this step the University includes, amongst its courses and areas of research, a field of study has made rapid advances in recent years and has become indispensable in many spheres of today's living. Beginning in the academic year 2001/2002, a three-year Degree Course in Applied Computer Science was introduced. This course is characterised by its practical, industry-oriented approach and by its linguistic aspects. While foundations and core subjects of computer science are examined, the application-oriented aspects of computer technology play a predominant role of our teaching. Courses are mostly taught in English and hence give, Bozen-Bolzano, the university's principal location, a highly competitive edge.

Experience in cooperation:

The Faculty of Computer Science started in 2001 together with a center of research, the Center for Applied Software Engineering (CASE). The major goals of CASE are: promoting excellence in software engineering and management conducting experimental studies with its partner software companies, assessing quantitatively their practices and identifying areas for improvement with respect to the so-called best practices, including the area of education and corporate learning in software engineering disseminate knowledge in software engineering across companies. The specific objectives of the research are: collection of software engineering data from the partner industries, analyzes and manages a customizable set of software metrics identification of models from experimental software engineering data identification of techniques to extract experience analysis of best practices in development methodologies, like Agile Methodologies Analysis of best solutions for Public Administrations with particular focus on Open Source and Libre Software packaging and dissemination of acquired experience

Core participants:

- Giancarlo Succi. Prof. Giancarlo Succi received the Laurea degree in Electrical Engineering and the Ph.D. in Computer and Electrical Engineering from the Universite di Genova and the MSc in Computer Science the State University of New York, Buffalo, NY. He is Professor and Director of the Center for Applied Software Engineering at the Free University of Bolzano-Bozen. Before joining the FUB, he has been Assistant Professor at the Universite di Trento, Associate Professor at the University of Calgary and Full Professor at the University of Alberta. He was also chairman of a small software company, EuTec. The research activity of Prof. Succi focuses on software open source and open standards, agile methodologies, software quality, empirical software engineering, software product lines, software reuse, software engineering over the internet. He has published more than 100 scientific papers and several books. He has been principal investigator for projects amounting more than EUR 3.5M cash and, overall, he has received more than EUR 7M in research support from private and public granting bodies. He has been chairing and co-chairing several international conferences and workshop, member of the editorial board of international journals, and leader of international research networks.

- Prof. Succi is a consultant for several private and public organizations worldwide in the area of software system architecting, design, and development; strategy for software organizations; training of software personnel. - Barbara Russo received her Laurea degree and her PhD degree from the University of Trento, Italy, respectively in 1991 and 1996, all in Mathematics. Dr. Russo was post-doc fellow and research assistant in Mathematics in the University of Trento, Italy. She was research associate at the Center for Applied Software Engineering of the Free University of Bolzano-Bozen. Currently she is Assistant Professor at the Free University of Bolzano-Bozen. Her current research interests focus on Defects Detection Process, Development Process Analysis and Measure with special focus on agile methods. Recently her research concerns Open Source and Libre Software - Roberto Cappucciois a third year

working student of the University of Bolzano-Bozen. He is the webmaster and senior developer of the Teleacademy (platform for the distance learning) project. He was a consultant, analyst for several companies. He has experience in different programming languages and platforms (ASP/SQL, .Net, ASP, ASP.net, Java, JSP - Eclipse, Netbeans, JBoss, ...)

Specific tasks:

- Detailed analysis of requirements
- Software platform for distance learning

Institution 9: FEUP

Faculdade de Engenharia da Universidade do Porto, <http://sifeup.fe.up.pt>. FEUP is one of the leading Engineering Schools in Portugal, with origins on the XVIII century. It is one of the largest Schools in the University of Porto, the largest University in Portugal, with several campuses throughout the city of Porto. The School is formed by 7 Departments, which offer 10 undergraduate degree programs, 24 Masters degree programs and 12 Ph. D. programs in various fields of Engineering.

Personnel: approximately 450 teaching staff

Learners: approximately 6262

Experience in cooperation. The School of Engineering of the University of Porto (FEUP) has a strong tradition of participation in research and educational networks throughout Portugal, Europe, Latin-America, Africa and East Timor. It has participated in the Erasmus, Socrates and Comenius programs. There are currently 729 research projects listed in the School's database of projects; many of them being European and Ibero-american projects.

Expertise related to the project. The group at FEUP provides teaching and research experience in the fields of Physics and Computer Science. In addition, they have experience in web publishing, development of software for collaborative projects via web and free software development and fundamentals. The group has also participated in some local open and distance learning initiatives. More generally, the group also provides experience on information systems and the use of information technologies in teaching, including distance learning.

Core participants:

– Jaime Villate, is an assistant professor in the Department of Physics at FEUP. His main research interests are in the areas of theoretical physics and computing. He is currently involved in research at the European Particle Accelerator (CERN), where he is working in development of information systems for the ATLAS experiment, which involves a collaboration of 1850 researchers from 34 countries. He has been a webmaster since the early 90's when the World Wide Web was introduced at CERN. He has participated in several courses and projects on teaching and the use of new technologies. He currently maintains a web portal at <http://fisica.fe.up.pt/ensino> for the courses he teaches at FEUP. Jaime Villate is also very active in the international Free Software community and he is the president of the Portuguese Free Software Association (ANSOL, <http://www.ansol.org>) an associate of the Free Software Foundation Europe (<http://www.fsfeurope.org>). He contributes to the development of Moodle (<http://moodle.org>), a free software Learning Content Management System (LCMS).

Specific tasks:

- Requirements analysis
- Testing and implementation of curriculum

Institution 10: Lincoln

University of Lincoln, <http://www.lincoln.ac.uk>. The University of Lincoln is the UK's newest city-centre university, and is expanding rapidly. The University of Lincoln is renowned for its progressive and pioneering approach to education. With some of the newest and most exciting campus developments in the country, most of which are located right at the heart the cathedral city, our students enjoy the best education as well as a great university experience. The Faculty of Applied Computing Sciences has research groups in distributed software engineering and AI and computer vision.

Experience in cooperation. The distributed software engineering research group has expertise in providing open-source tool support for collaborative distributed software engineering projects. Much of this work has built on open-source software, and the research group has been an active participant in the Open Source Software Engineering Workshops co-located with ICSE for several years, and is involved in CALIBRE, an EU-funded network of excellence in open-source software.

Expertise related to the project. The Faculty of Applied Computing Sciences within the university offers an exciting range of professionally recognized courses, research, and consultancy services in the broad areas of ICT and Media Technologies. There are research groups dedicated to Vision and Artificial Intelligence (AI), and Distributed Software Engineering. These groups are involved in a challenging range of projects such as AI applications in medicine, satellite imaging, and DSE applications in open source computing, web-based development, and collaborative software development environments. The DSE research group has expertise in providing open-source tool support for collaborative distributed software engineering projects. Much of this work has built on open-source software, and the research group has been an active participant in the Open Source Software Engineering Workshops co-located with ICSE for several years, and is involved in CALIBRE, an EU-funded network of excellence in open-source software.

Based on the Lincoln campus, the Department of Computing and Informatics has a broad range of up to date undergraduate core courses such as Computing, Internet Computing, Computer Information Systems and Informatics. One of our particular areas of expertise is Computer Games, which is now becoming a major area of economic growth worldwide. Our Games Computing degree is one of our most successful courses offering specialist training in an area which pushes computer technology to its limits. We offer a MSc programme in Internet Computing and are developing a MSc programme on Open Source Computing, as well as a variety of PhD research opportunities. The Lincoln team have a large number of publications in the field of collaborative and distributed software engineering, and have taken part in the ICSE workshops on open-source software engineering.

Core participants:

- Professor Cornelia Boldyreff will be the Open Source Computing MSc programme leader at Lincoln. She has over 25 years experience in Software Engineering and took up her post as a Professor of Software Engineering at Lincoln in January 2004 where she leads the Distributed Software Engineering research group. In her previous post at the University of Durham, she developed and taught the Advanced Software Engineering for the Internet Module on the Master's programme and was extensively involved in the development and teaching of the BSc in Software Engineering. Her group developed the Open Source Component Artefact Repository, OSCAR, within FP5 GENESIS and is currently developing support for collaborative design teams based on OSCAR within EPSRC CoDEEDS. Her group has made contributions to the support for collaborative software development for student groups in the SEGWorld project. Prof. Boldyreff has published papers on Software Engineering education and in Collaborative e-Learning. She currently participates in the LEGE-WG (Learning Grid of Excellence Working Group), a Thematic Network funded by the European Commission (2002-2004).

- Stephen Rankis is a post-doctoral research associate on the CoDEEDS project at Lincoln. The project's main aim is to build a platform of tools to support distributed, collaborative software engineering. At Durham, Stephen's research has been concentrated on the problems involving collaboratively developed artefacts (such as distributed configuration management). He and David Nutter, the other full-time researcher on the GENESIS project at Durham, designed and built the artefact management component, OSCAR. The GENESIS project released its tools under an open-source licence, and itself used various open source components and tools in its own developments. His research background is in the engineering of maintainable software systems, which is a problem just as much for Free/Open-Source software as for any other kind.

- David Nutter has been the lead implementer of OSCAR and is carrying out part-time PhD research on awareness within collaborative software development environments supervised by Prof. Boldyreff. Both Mr Nutter and Dr Rank are currently employed as research associates on EPSRC Collaborative Determination Elaboration and Evolution of Design Space (CoDEEDS) project working with Prof. Boldyreff in the development of an open source advanced environment to support collaborative design of large software systems from components. The CoDEEDS prototype has been implemented using OSCAR as its underlying artefact management component.

- Professor Andrew Hunter leads the Vision and Intelligence research group at Lincoln, which is currently active in a number of areas, including: automated diagnosis of diabetic retinopathy, the leading cause of blindness in the developed world; security surveillance and monitoring of the vulnerable; automated dosing of Warfarin; the inference of comprehensible models for medical practitioners; and satellite imaging. Professor Hunter is responsible for the development of the free GA system, Sugali, to support research and implementation in Genetic Algorithms on a

common software platform. Sugal supports a large number of variants of Genetic Algorithms, and has extensive features to support customisation and extension.

- Mr Paul Reeve is the Head of the Department of Computing and Informatics at the University of Lincoln. He is an advocate and practitioner in the development of learning resources, using open formats, and of student learning environments, using Open Source software, with expertise in human factors and software development. His most recent development work has been within web-based projects. He has excellent links with local further education providers in Lincolnshire; a number of whom are moving to Open Source platforms with development staff who may be potential students on the Master's in Libre Software.

Specific tasks:

- Analysis
- Distance Learning
- Coordination of Subject Preparation
- Implementation of Master

Institution 11: Salford

University of Salford, <http://www.salford.ac.uk>. The University of Salford is committed to high quality education, research and academic enterprise that benefits industry, business and the wider community. The University is renowned for its innovative courses and its highly employable graduates: over 90% of students get jobs or go on to further study within six months of graduating. The Information Systems Institute is concerned with the theory and application of information systems and technologies in businesses and other organisations.

Learners: about 18,000 students (including 2,500 postgraduates and 2,000 international students)

Experience in cooperation. Our highly successful degree courses have a pedigree stretching back to 1986. They have been designed in collaboration with our partners in business, industry and the public sector and are inspired by our leading-edge information systems research.

Expertise related to the project. A major strength of the ISI is its research effort, which has already been combined for some years. As one of the leading IS research groups in the UK, it has an international reputation, while also maintaining a key presence in local initiatives such as the GEMISIS project, exploiting internet technology to the benefit of the Greater Manchester community. In addition to research-active staff, a large number of full-time and part-time research students are working towards a PhD. The 2001 Research Assessment Exercise has given top marks for Information Systems Research at Salford.

Core participants:

- Gordon Fletcher is a lecturer in the Information Systems Institute, University of Salford. Gordon convenes the undergraduate modules Further Programming (in Java) and Software Engineering. He also convenes the Masters level modules Systems Development with Java. Gordon's research focuses on the social and cultural aspects of information technology and virtual environments. He has published a range of papers for Information Systems and Anthropology that discusses the application of concepts of tribalism and conflict to virtual communities. Gordon recently presented a paper at the Java in the Computing Curriculum conference that considered the development of cargo cults among reluctant and new programming students. Gordon has also developed a taxonomic approach to the interpretation of popular web search terms in an effort to ascertain their relevance and relationship to contemporary culture. Gordon has also worked in a professional staff development role disseminating and educating HE academics on good flexible learning practices (with a particular emphasis on Web-based delivery).

- Professor Grahame Cooper is Professor of Applied Information Systems Engineering at the University of Salford. After completing his PhD in Computational Physics in 1987, he has been teaching and researching in areas related to software engineering for over 17 years, with a particular emphasis on Object-Oriented Systems, and their application in the Construction Industry. Grahame has been strongly interested in open source software since 1998, is very experienced in Linux implementation and networking, and is able to contribute to the development of an MSc under a wide range of areas ranging from the technical to the organizational. After completing a term of nearly 9 years as Head of School, Grahame is now taking a year's sabbatical leave to concentrate on developing further his interest in open source software.

- Frances Bell will also contribute to the project.

Specific tasks:

- Analysis
- Distance Learning
- Implementation of Master

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nstitution 12: AUC

Agder University College, <http://www.hia.no>. The Agder University College (AUC) has three campuses located in the three Norwegian south coast towns, Kristiansand, Arendal and Grimstad. The Faculty of Engineering and Science is located in Grimstad. The research activities at the Department of ICT are organised in research groups. The groups conduct research in mobile communication, systems design, systems security, open systems development, systems dynamics, information communication management, and applied ICT, respectively. In the course of an ongoing quality reform an increasing number of courses are available also in English. Personnel: about 840

Learners: about 8000 students

Experience in cooperation. For many years, Grimstad has been considered the "Technology Park" of the south coast Sørlandet. Consequently, many important technology and industry players have located departments or regional offices to the Grimstad area. The ICT department of AUC is known to have strong co-operation with industry both in form of student's projects, guest lectures and as joint research. AUC is already participating in a Norwegian national expert group appointed by the Norwegian board of Technology to elaborate on further development of Information Society specially considering issues like open standards, democracy, security and competition based on merit. This work will produce a policy document to the Norwegian Parliament.

Expertise related to the project. Open Source has through persistent promotion and teaching activities gained interest both in local municipalities, in local media and also on European level where AUC is in the process of developing an IST project for measuring the use of open standards based on measurement tools developed in open source. This year AUC will also host the Gnome Users and Developers European Conference (GUADEC). In co-operation with local SMEs, the university college has organised popular seminars on Machine learning for complex problem solving. A common feature of the group at AUC behind this proposal is that open standards for representing and exchanging information are used as much as possible. In addition to work with a pilot version of an internet accessibility robot called ROBACC, the current projects include activities to design a system for low cost secure and stable Internet access, based on Linux and obsolete hardware. The group has ongoing projects on pattern recognition techniques for intrusion detection and image analysis. In addition, research interests include datawarehousing, and UML modelling.

Core participants:

- Maung K. Sein is Professor of Information Systems (IS) at Agder University College (AUC) and University of Bergen (UB) (both in Norway). A Ph.D. graduate from Indiana University, USA, he has served at Georgia State University, Florida International University and Indiana University, all in USA. His current research interests are Information and Communications Technology (ICT) in national development, IT in public sector, and, e-Government. He has conducted research in end-user training, human-computer interaction, conceptual database design, systems development methods, data warehousing, computer personnel, and IS management. He has published widely in such prestigious journals as Information Systems Research, Management Information Systems Quarterly (MISQ), Communications of the Association of Computing Machinery (CACM), The Information Society, and Human Computer Interaction and presented his research around the world. He has lectured widely on different aspects of research methods such as research approaches and their philosophical paradigms and has conducted workshops and seminars on research methods at several universities in USA, Norway, Finland and Tanzania. He has or is serving on editorial boards of MISQ, MISQ Executive, Communication of the Association of Information Systems, and E-Service Journal and guest-edited a special issue of CACM. He has chaired and has served on program committees of several international conferences. He is currently a member of the steering committee of the Norwegian network on ICT and development.

- Nils Ulltveit-Moe works as a consultant, and is also a lecturer at Agder University College. He has a MSc in Cybernetics from Stavanger University College, and has wide experience in software development, system integration, computer networks and computer security from Telenor and Ericsson. He has taught Data

Communication, Operating Systems and System Programming, and Client Server programming at Agder University College. Research includes "Low cost sensor for managed distributed IT security service", funded by Norwegian Research Council, and ROBACC - a web accessibility monitor. He is one of the founders of Agder Linux User Group, and has experience from arranging Open Source related conferences. Current interests range from Open Source business models, law, e-government and to designing accessible cultural heritage portals with OAI metadata interoperability.

- Andreas Prinz was appointed as a professor for Systems Development at HIA in 2003. He studied mathematics and computer science at the Humboldt-University in Berlin, Germany, and received his M.Sc. in mathematics (1988) and Ph.D. (1990) in computer science there. From 1990 until 1993 he was a post-doctoral fellow at the Humboldt-University. From 1993 to 1994 he worked at the Software Verification Research Centre (SVRC) in Brisbane, Australia. From 1994 to 1997 he again worked at the Humboldt-University. From 1997 to 2003 he worked with DRResearch GmbH, a company in Berlin. His research interests include formal methods together with their application and use in tools. So he has also strong interest in software technology and compiler construction. Prof. Prinz has worked in several projects dealing with the development of modern telecommunication systems using advanced technology.

- Agata Sawicka, M.Sc. Eng., graduated with honours from the Warsaw University of Technology in 1998. Her Master Thesis concerned usability study of the information system supporting real-estate registers in the regional courts of justice in Poland. In 1999, she worked briefly as a software test engineer with Microsoft European Product Development Center in Dublin, Ireland, and spent one semester in Trondheim, Norway, studying HCI at the Norwegian University of Science and Technology (research scholarship from the Norwegian Research Council). In 2000 she entered a doctoral program at the University of Bergen, Norway. Simultaneously, she has been employed as a doctoral research fellow at Agder University College (AUC). Her doctoral research concerns dynamic aspects of human factors in IT-security and design of robust security policies. The research involves experimental studies as well as development of simulation models to assist design of robust security policies. At AUC, she has participated in research conducted by the Open Systems group (<http://osys.grm.hia.no>). She has been involved in work on development of low cost Internet access, based on Linux and obsolete hardware, and a pilot version of an Internet accessibility robot, ROBACC.

- Mikael H. Snarud, Dr. Techn. is Associate Professor of Computer Science at Agder University College in Norway. He received his M.Sc. in mechanical engineering from the University of Luleå, Sweden in 1986. He submitted his doctoral thesis on knowledge based systems to the Technical University of Vienna, Austria in 1995. From 1991 to 1997 he was responsible for management of the information system at the Institute for Virology, University of Vienna, working with relational database and user interface designs as the system was upgraded. From 1998 to 2003 he was with Agder Research Foundation in Kristiansand, Norway, leading a number of projects on eLearning, development of standards for electronic business transactions in the Maritime sector (as input to ISO standardisation work), and accessibility to the built environment. In 2000 he has joined Agder University College as Associate Professor in ICT. He teaches courses on advanced database theory, accessibility in Information Technology. Beyond his teaching responsibilities he has been actively involved in a range of research activities. He also was the co-ordinator of the Agder ICT-lab. Currently he is leading the research group for Open Systems at the College (more information about the group can be found at <http://osys.grm.hia.no>) and is responsible for international contacts for the Institute of ICT. In this capacity he has organised student exchange with Germany and guest lectures such as a visit by Bruce Perens. (A video of his talk is available at <http://osys.grm.hia.no/opensource/>). He has been engaged in a number of projects in the European arena: MIDAS-Net (Multimedia Information Demonstration and Support Network) - organising events, initiating projects and presenting talks at MIDAS events. He was the Exploitation Manager of the BARRIER INFO (DE 3202): Development of a Multimedia Database Providing Information on Accessibility of Public Buildings for People with Reduced Mobility. The project was funded by The Telematics and Applications Programme and successfully completed in 2000 (see also www.you-too.net). For the European Observatory for SMEs, Sixth Report, he was the chapter co-ordinator of a chapter on Electronic Commerce and SMEs. A summary and the full report is available at http://europa.eu.int/comm/enterprise/enterprise_policy/analysis/observatory.htm. He was the Norwegian co-ordinator of IECOMM, aiming at enabling SMEs to conduct international electronic commerce in Europe. The project was funded by DG-Enterprise. In 2003 he was appointed by the Norwegian Board of Technology to an expert committee on Software policy. The committee deals with democracy issues in Information Society with respect to Software and will report to the Norwegian Parliament in April 2004. He has published papers on Computer Science, Control Engineering and Internet Accessibility. His research interests are Accessibility, Open Standards, Usability, Device Independence and Open Source in Information Society. He formulated the first ideas for ROBACC. Other recent activities include co-organisation of a number of events on use of Open Source and Open Standards in municipalities and the public sector in general. He was a member of the Ibsen Society board in Grimstad (2000-

2003) and President of Lillesand Rotary Club (2002-2003). Currently, he is a board member of Agder Linux User group, and "Linux i Skolen" - a national user organisation for www.SkoleLinux.no. He is fluent in English, Swedish, Norwegian, and German, and has a basic knowledge of Spanish.

- Janis Gailis, Cand. Scient., is Assistant Professor of Informatics at Agder University College (AUC). He received his Cand. Scient. (M.Sc. Equivalent) in informatics with the specialization in mathematical modeling from the University of Oslo, Norway in 1996. From 1996 to 2000, he had consultant positions for several companies, also for companies related to the Open Source community. In this period he was mainly involved in software development projects. In 2000 he has joined AUC as Assistant Professor in Information Systems. He has developed several modules for bachelour level studies based on Free / Open Source Software and also integrated general issues of Free / Open Source Software in the courses he has been responsible for. In the co-operation with Mikael Snaprud and others from AUC, a Linux-lab has been established at the AUC. This lab has been used in teaching related to the bachelour studies in information systems. He has also been involved in the organisation committees for the Linux install weeks at AUC and GUADEC V GNOME users' conference. He is also participating in a group of teaching and administrative staff, that has established a Center for Open Source at AUC february 2004. The main objective of this center is to coordinate and consolidate the open source related actors in companies, public administration and educational institutions. He is supervising several master degree students working on master thesis realated to the Free / Open Source Software His research interests are related to the software development methodologies in Open Source Communities and general, social and political aspects of Libre Software. He is planning to start work for his Ph.d degree related to the Libre Software.He is fluent in Latvian, Russian, English, Norwegian and has a basic knowledge of German.

Specific tasks:

- Analysis
- Distance Learning
- Implementation of Master

5.2 Specific tasks

See above in Point 5.1.

5.3 External partners

Inside a network of partners several co-operation initiatives will be realized, for instace, co-operation with the University of Latvia, Technical University of Latvia and University of Oslo, among others. We have also explored some networks of enterprises in different countries, which have been interested in both development and implementation of the Molos. We are going to strengthen relation to those networks in near future.

6. Planning of activities (maximum 2 pages plus work plan in table format below)

- 6.1 Describe and justify the **overall working methods** the partnership intends to use when carrying out the project (management procedures, research and pedagogical methods, data gathering, joint design, types of meetings, teleconferencing etc.).
- 6.2 Justify in overall terms the **duration** of the Socrates support (two or three years), in relation to the nature and number of the outputs envisaged.
- 6.3 Describe any plans or intentions you may have for establishing **links with other projects** and / or networks, within Socrates or beyond.
- 6.4 **On the basis of the above**, provide an overall **work plan** using the table format given below. To this end, please:
- Divide the project into the relevant **stages** (such as needs analysis, identifying common elements/components, collection of materials, definition of teaching methods drafting the design of the curriculum, design and content of the courses, editing and production of material, publication , testing of the curriculum (by involving students), implementation of the curriculum at the participating institutions, dissemination etc.) which you envisage in order to produce the project outputs identified;
 - Show within each stage, what **activities** the partnership will undertake, which **partner(s)** will be responsible for each stage, how many **persons** (person / days or person / months) each activity will require and **by when** each activity will have been completed.

6.1 Overall working methods

Research and pedagogical methods

Pedagogically, the focus will be on the learning by co-operation and learning by doing. Different models of evaluation will be proposed (online methods, map-evaluation, where students delivers small peaces of work during the course and some or all of them are used as a background for grades). The aims are to guarantee a continuous work on the subject and also test the communication skills (in this case in the international groups).

In order to achieve the learning objectives of each module, a set of Continuous Evaluation Activities (CEA) will be suggested to the students. Typically, 3-4 CEA will be necessary for each subject or module. Final exams will also be scheduled at the end of each term for the theoretical subjects. In some subjects (the practical ones), the CEA can be the only way of evaluation and the students will be asked to deliver a final essay to synthesise the module.

The continuous evaluation can be carried out in the distance-learning part of the semester. Whenever group cooperation is required for the CEA, some free software tools for cooperative work should be found or developed. The CEA will be designed in such a way that the most important concepts of each subject are included, and they can be viewed as the conducting wire of the learning process of each subject.

Project work will be emphasized, especially co-operation in virtual groups, where the students from different locations co-operate by the means of some collaboration tool (which will be installed in the preparation stage of the project). The reasoning and reflectiveness as a result of group work will be appreciated in the evaluation process.

A framework to collect and analyze requirements should be created. Definition of common agreed standards and integration of the existing and new approaches will be emphasized. A prototype platform for distance learning will be build and evaluated and validated against requirements. On-line manuals and usage workflows will be produced. Results will be disseminated.

Joint design

Design and implementation of a framework for the joint course development (related to the context of this particular program) will be a part of this project.

Types of meetings

5 face to face meetings are scheduled. Teleconferencing will also be used.

6.2 Duration of the project

The development of joint degree is relatively new phenomenon in the European Higher Education Area. With more than 10 participating institutions such a development requires a great amount of coordination and depends on legislative changes in the countries of the participating institutions. Therefore three years are proposed, to achieve the objectives of the project and deliver all of the envisaged outputs.

6.3 Links with other projects

Some contacts have already being established with the CALIBRE project (which is in the final stages of approval withing the 6th Framework Program of the Commission). CALIBRE is a Coordinated Action wichestablishes a network of centers with active research on libre software. Among its interests is also the promotion of higher education (mainly postgraduate) on research topics related to libre software. Two partners in CALIBRE are also in this master proposal, and therefore it is expected that those links are simple to establish. Currently, there are conversations to set up a joint meeting by the end of 2004, followed by mainly telematic conversations.

Also sime contact have been established with Edukalibre, a Minerva project which started in 2003, which also shares two partners with this proposal. Edukalibre is developing tools for building educational materials using procedures similar to those of the libre software community. It is expected that some of those tools will be useful for the preparation of materials for this master. Coordination with Edukalibre will be done through the common partners, and by using telematic tools.

FUB-LUB is involved in VI EU framework project COSPA: "A Consortium for studying, evaluating, and supporting the introduction of Open Source software and Open Data Standards in the Public Administration".

6.4 Activities and outputs

S1. Preparation and kickoff (2004.10-2005.01)

- A1.1. Establishment of management environment, including all committes
- A1.2. Installation and testing of the software used for coordination
- A1.3. Establishment of economical and contractual relationships among partners
-
- O1.1. Agreed management and cooridnation plan (document)
- O1.2. Website with access to the software used for coordination (software)
- O1.3. Signed contracts among members (documents)
-

S2. Detailed analysis of requerements (2005.02-2005.05)

- A2.1. Design of surveys and other instruments to build a base for requirements collection
- A2.2. Send and collect surveys, and informally ask for requirements and opinions to experts in the field
- A2.3. Process all the material to determine the requirements for the curricula
-
- O2.1. Surveys (document)
- O2.2. Requirements document
-

S3. Study of similar experiences (2005.02-2005.05)

- A3.1. Study of master programs in this field
- A3.2. Study of logistic aspects of other international masters
-
- O3.1. Report on current academic experiences in the field (document)
- O3.2. Report on current logistics experiences relevant to this master
-
- S4. Elaboration of the first iteration of the design (2005.06-2005.09)
 - A4.1. Elaboration of the academic design
 - A4.2. Elaboration of the logistics design
 - A4.3. Elaboration of detailed QA plan
 - A4.4. Elaboration of student recruitment plan
 -
 - O4.1. Academic design v1 (document)
 - O4.2. Logistics design v1 (document)
 - O4.3. Quality assurance plan v1 (document)
 - O4.4. Student recruitment plan v1 (document)
 -
- S5. Prospective studies on accreditation and international coordination (2005.06-2005.09)
 - A5.1. Studies on accreditation requirements in participating countries
 - A5.2. Study of conflicts among the requirements and uses of participating countries and Universities
 -
 - O5.1. Report on accreditation requirements (documents)
 - O5.2. Report on conflicts among requirements, and exploratory solutions (document)
 -
- S6. Software platform for distance learning (2005.10-2006.09)
 - A6.1. Study of the available software, and election of the one to be used
 - A6.2. Installation and testing of the software
 - A6.3. Maintenance
 -
 - O5.1. Report on available software (document)
 - O5.2. Installed selected software (software)
 -
- S7. Detailed preparation of selected subjects (2005.10-2006.02)
 - A7.1. Elaboration of details of selected subjects
 - A7.2. Feedback on those subjects
 -
 - O7.1. Detailed design of each selected subject (document)
 - O7.2. Report on comments on the detailed design (document)

-
- S8. Testing of selected subjects (reduced version of the curricula) (2006.02-2006.07)
 - A8.1. Implementation of a downscaled version of the master
 - A8.2. Quality followup and continuous evaluation of the implementation
 -
 - O8.1. Report on the first implementation of the downscaled version of the master (document)
 - O8.2. Report of problems found, strengths detected, and evaluation summary
 -
- S9. Accreditation process (2005.10-2006.09)
 - A9.1. Accreditation of the master studies in the participating countries
 -
 - O9.1. Report on the accreditation status
 -
- S10. Elaboration of the second iteration of the design (2006.06-2006.09)
 - A10.1. Reelaboration of the academic design
 - A10.2. Reelaboration of the logistics design
 - A10.3. Reelaboration of detailed QA plan
 - A10.4. Reelaboration of student recruitment plan
 -
 - O10.1. Academic design v2 (document)
 - O10.2. Logistics design v2 (document)
 - O10.3. Quality assurance plan v2 (document)
 - O10.4. Student recruitment plan v2 (document)
 -
- S11. Implementation of the full version of the master (2006.10-2007.06)
 - A11.1. Implementation of the full version of the master
 - A11.2. Quality followup and continuous evaluation of the implementation
 - A11.3. Maintenance of the software used for the master
 -
 - O11.1. Report on the implementation of the master (document)
 - O11.2. Report of problems found, strengths detected, and evaluation summary
 -
- S12. Elaboration of the Third iteration of the design (2007.06-2007.09)
 - A12.1. Reelaboration of the academic design
 - A12.2. Reelaboration of the logistics design
 - A12.3. Reelaboration of detailed QA plan
 - A12.4. Reelaboration of student recruitment plan
 -

- O12.1. Academic design final version (document)
 - O12.2. Logistics design final version (document)
 - O12.3. Quality assurance final version (document)
 - O12.4. Student recruitment final version (document)
 -
- S13. Dissemination (2006.10-2007.09)
- A13.1. Seminar about the master
 - A13.2. Presentations on magazines, congresses and workshops
 - A13.3. Setting up of a website with information on the master
 -
- O13.1. Documents for the dissemination of the master (document)
 - O13.2. Website with information on the master
 -
- S14. Management (2005.02-2007.09)
- A14.1. Management and coordination of the master
 - A14.2. Quality assurance of the project
 - O14.1. Reports on the evolution of the master

6.5 Work Plan

Project:						
<i>Stage in life of project</i>	<i>Outputs: By the end of this stage we will have achieved / produced</i>	<i>Activities leading to this output</i>	<i>Activity to be started by this date and completed by this date</i> Start Complete		<i>Partners / Persons involved</i>	<i>Time input (person / days, estimation)</i>
S1 Preparation and kick-off	[O1.1-3]	[A1.1-3]	1 October 2004	30 January 2004	All coordinated by URJC	40
S2 Detailed analysis of requirements	[O2.1-2]	[A2.1-3]	1 February 2005	31 May 2005	All coordinated by FUB- LUB	40
S3 Study of similar experiences	[O3.1-2]	[A3.1-2]	1 February 2005	31 May 2005	All coordinated by URJC	45
S4 Elaboration of the first iteration of the design	[O4.1-4]	[A4.1-4]	1 June 2005	30 September 2005	All	40
S5 Prospective studies on accreditation and international coordination	[O5.1-2]	[A5.1-2]	1 June 2005	30 September 2005	All	30
S6 Software platform for distance learning	[O6.1-3]	[A6.1-2]	1 October 2005	30 September 2006	FUB-LUB, UOC, AUC, Lincoln, URJC	90
S7 Detailed preparation of selected subjects	[O7.1-2]	[A7.1-2]	1 October 2005	28 February 2006	All coordinated by URJC, Lincoln, Salford and Paris 7	40
S8 Testing of selected subjects (reduced version of the curricula)	[O8.1-2]	[A8.1-2]	1 February 2006	31 July 2006	All	50
S9 Accreditation process	[O9.1]	[A9.1]	1 October 2005	30 September 2006	All	30
S10 Elaboration of the second iteration of the design	[O10.1-4]	[A10.1-4]	1 June 2006	30 September 2006	All	50
11 Implementation of the full version of the master	[O11.1-2]	[A11.1-3]	1 October 2006	30 June 2007	All coordinated by URJC	84
12 Elaboration of the third iteration of the design	[O12.1-4]	[A12.1-4]	1 June 2007	30 September 2007	All	65

13 Dissemination	[O13.1-2]	[A13.1-3]	1 October 2006	30 September 2007	All	60
14 Management	[O14.1]	[A14.1-2]	1 February 2005	30 September 2007	URJC, UAH, AUC, FUB- LUB	50

7. Contribution to transversal policies (maximum 1 page)

In terms of (a) the **impact of the project** on the target group and (b) **participation in the project itself**, please specify where applicable how and to what extent the project will actively

- promote equal opportunities between women and men;
- promote equal opportunities for disabled persons;
- contribute to the fight against racism and xenophobia;
- promote social and economic cohesion;
- promote ICT in education and eLearning;
- promote language learning and linguistic diversity;
- prepare the enlargement of the Union;
- promote sustainable development;
- promote stability and security;
- tackle the future challenges to education and training systems and lifelong learning;
- promote the European Year of education through sport 2004.

8. Contribution to the annual priorities as published in the annual SOCRATES call for proposals (maximum 1 page) (see <http://europa.eu.int/comm/education/socrates/download.html>).

Horizontal priorities

Molos will be inclusive for the new EU member countries (priority A; see also Section 4 Point 5.3).

Molos contributes to annual priority B by developing the master in libre software which can contribute to a more levelled playing field in the IT sector, which opens up for a sustainable IT ecosystem in both EU and developing countries, developed in mutual solidarity between IT practitioners in first and third world countries.

Molos contributes to annual priority C - stability and security by providing a subject on security in Libre Software, and also by focusing on intercultural dialogue between students cooperating on libre software projects distributed between several member states cultures or countries.

Molos contributes to annual priority D by actually implementing the course as joint work between the member universities, which will give greater insight into the future challenges concerning integration of education and training systems within Europe, and structured cross-institution development of courses at Master level.

Molos contributes to annual priority E - promoting equal opportunities for all by emphasising that course material should be accessible for people with disabilities and also accessible for different technologies. The course itself will emphasise technologies that follow accepted standards and best practices for accessibility. Awareness about libre software will also open up for more competition for IT products for minority languages, which also may cause a greater diversity of localised commercial software for minority groups. The course itself will be available in several translations. Libre software introduces a levelled playing field which helps offsetting the socio-economic effect of the digital divide. Gathering all students during some weeks lectures and workshops will help the students understanding of other cultures, and reduce racism. Molos will contribute to Annual priority F and G by providing a course that is well suited both for students as well as practitioners that have long experience, but want more knowledge about technology and methodologies within the field of libre software. Designing the courses so that the students actively participates in Libre software collaboration projects as part of the studies provides new possibilities for new pedagogical as well as new assessment methods. Most of the courses will be done as distant courses using e-learning technologies, and some parts involves gathering the students and expert practitioners for lectures and workshops.

9. Other aspects (maximum 1 page)

Please state any other aspects of the proposed project, which you feel the Commission should take into account when assessing your proposal.

Knowledge at expert level about libre software, and why it works is a new cross disciplinary field. It is important to raise the level of knowledge among future practitioners and IT-experts in this field, to improve awareness for when Libre software solutions should be considered, and when they are less well suited. This counts both for project managers, developers, politicians and future IT industry leaders that have to take IT policy decisions or perform IT purchasing. Building a well founded master study on Libre Software is a first step in professionalising the field as a new area of research which should be followed up with PhD programmes doing proper research on how, when and why libre software works and when it should be applied for businesses, e-government and other products. It could be followed up by working tightly with European regional and national centres of excellence on Open Source which are under development by the European Union.

ANNEXES

ANNEX 1

Annex 1: List of codes to be used in the application

You will find here the codes you will have to use when filling in the application, i.e. :

- Type of institution codes
- Country codes
- Language codes
- Region codes (NUTS)

Type of Institution(*)	
EDU.1	Nursery school
EDU.2	Primary school
EDU.3	Secondary school (incl. Vocational / technical)
EDU.4	Higher education institution
EDU.5	Adult or continuing education provider
ASS.1	Non-profit association (regional/national)
ASS.2	Non-profit association (European / international)
ASS.3	Association of Universities
RES	Research institute
PUB.1	Public authority (local)
PUB.2	Public authority (regional)
PUB.3	Public authority (national)
IND	Private company (manufacturing)
SER	Private company (services)
OTH	Other type of organisation

(*) The term "Institution" is understood to mean any type of institution, establishment or organisation eligible to participate in the Action of the SOCRATES Programme to which the present application form refers (see *Guidelines for Applicants*)

Country				Language(**)			
BE	Belgium	IS	Iceland	DA	* Danish	IS	Icelandic
DK	Denmark	LI	Liechtenstein	DE	* German	NO	Norwegian
DE	Germany	NO	Norway	EL	* Greek	BG	Bulgarian
GR	Greece	BG	Bulgaria	EN	* English	CZ	Czech
ES	Spain	CZ	Czech Republic	ES	* Spanish	EE	Estonian
FR	France	EE	Estonia	FI	* Finnish	LV	Latvian
IE	Ireland	CY	Cyprus	FR	* French	LT	Lithuanian
IT	Italy	LV	Latvia	IT	* Italian	HU	Hungarian
LU	Luxembourg	LT	Lithuania	NL	* Dutch	MT	Maltese
NL	The Netherlands	HU	Hungary	PO	* Portuguese	PL	Polish
AT	Austria	MT	Malta	SE	* Swedish	RO	Romanian
PT	Portugal	PL	Poland	GA	Irish	SI	Slovene
FI	Finland	RO	Romania	LE	Letzeburgesch	SK	Slovak
SE	Sweden	SI	Slovenia			TR	Turkish
UK	United Kingdom	SK	Slovak Republic				

(**) Only the languages shown in this table are eligible "target languages" for Lingua projects, and for language projects within Comenius.

REGION CODES (NUTS)

BE BELGIUM

BE1	BRUXELLES CAP. BRUSSEL HOF
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BE21	ANTWERPEN
BE22	LIMBURG
BE23	OOST-VLAANDEREN
BE24	VLAAMS BRABANT
BE25	WEST VLAANDEREN

BE31	BRABANT WALLON
BE32	HAINAUT
BE33	LIEGE
BE34	LUXEMBOURG
BE35	NAMUR

DK DANMARK

DK001	Københavns og Frederiksberg Kommuner
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DK002	KØBENHAVNS AMT
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DK009	SØNDERJYLLANDS AMT
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DK003	FREDERIKSBORG AMT
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DK00A	RIBE AMT
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DK004	ROSKILDE AMT
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DK00B	VEJLE AMT
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DK005	VESTSJÆLLANDS AMT
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DK00C	RINGKØBING AMT
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DK006	STORSTRØMS AMT
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DK00D	ÅRHUS AMT
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DK007	BORNHOLMS AMT
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DK00E	VIBORG AMT
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DK008	FYNS AMT
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DK00F	NORDJYLLANDS AMT
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DE DEUTSCHLAND

BADEN WÜRTTEMBERG	
DE11	STUTTGART
DE12	KARLSRUHE
DE13	FREIBURG
DE14	TÜBINGEN

NIEDERSACHSEN	
DE91	BRAUNSCHWEIG
DE92	HANNOVER
DE93	LÜNEBURG
DE94	WESER-EMS

BAYERN	
DE21	OBERBAYERN
DE22	NIEDERBAYERN
DE23	OBERPFALZ
DE24	OBERFRANKEN
DE25	MITTELFRANKEN
DE26	UNTERFRANKEN
DE27	SCHWABEN

NORDRHEIN-WESTFALEN	
DEA1	DÜSSELDORF
DEA2	KÖLN
DEA3	MÜNSTER
DEA4	DETMOLD
DEA5	ARNSBERG

DE3	BERLIN
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RHEINLAND-PFALZ	
DEB1	KOBLENZ
DEB2	TRIER
DEB3	RHEINHESSEN - PFALZ

DE4	BRANDENBURG
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DEC	SAARLAND
-----	----------

DE5	BREMEN
-----	--------

DE6	HAMBURG
-----	---------

SACHSEN	
DED1	CHEMNITZ
DED2	DRESDEN
DED3	LEIPZIG

HESSEN	
DE71	DARMSTADT
DE72	GIESSEN
DE73	KASSEL

DE8	MECKLENBURG-VORPOMMERN
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GR	ELLADA
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VOREIA ELLADA	
GR11	ANATOLIKI MAKEDONIA, THRAKI
GR12	KENTRIKI MAKEDONIA
GR13	DYTIKI MAKEDONIA
GR14	THESSALIA

KENTRIKI ELLADA	
GR21	IPEIROS
GR22	IONIA NISIA
GR23	DYTIKI ELLADA

ES	ESPAÑA
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NOROESTE	
ES11	GALICIA
ES12	ASTURIAS
ES13	CANTABRIA

NORESTE	
ES21	PAÍS VASCO
ES22	NAVARRA
ES23	LA RIOJA
ES24	ARAGÓN

ES3	COMUNIDAD DE MADRID
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ES7	CANARIAS
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SACHSEN-ANHALT	
DEE1	DESSAU
DEE2	HALLE
DEE3	MAGDEBURG

DEF	SCHLESWIG-HOLSTEIN
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DEG	THÜRINGEN
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GR3	ATTIKI
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NISIA AIGAIU, KRITI	
GR41	VOREIO AIGAIO
GR42	NOTIO AIGAIO
GR43	KRITI

GR24	STEREA ELLADA
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GR25	PELOPONNISSOS
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ESTE	
ES51	CATALUÑA
ES52	COMUNIDAD VALENCIANA
ES53	ISLAS BALEARES

SUR	
ES61	ANDALUCIA
ES62	MURCIA
ES63	CEUTA Y MELILLA

CENTRO	
ES41	CASTILLA-LEÓN
ES42	CASTILLA- LA MANCHA
ES43	EXTREMADURA

FR	FRANCE
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FR1	ILE DE FRANCE
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BASSIN PARISIEN	
FR21	CHAMPAGNE – ARDENNE
FR22	PICARDIE
FR23	HAUTE NORMANDIE
FR24	CENTRE
FR25	BASSE NORMANDIE
FR26	BOURGOGNE

FR3	NORD - PAS DE CALAIS
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EST	
FR41	LORRAINE
FR42	ALSACE
FR43	FRANCHE-COMTE

SUD-OUEST	
FR61	AQUITAINE
FR62	MIDI-PYRENEES
FR63	LIMOUSIN

CENTRE-EST	
FR71	RHÔNE-ALPES
FR72	AUVERGNE

MEDITERRANEE	
FR81	LANGUEDOC-ROUSSILLON
FR82	PROVENCE-ALPES-CÔTES D'AZUR
FR83	CORSE

OUEST	
FR51	PAYS DE LOIRE
FR52	BRETAGNE
FR53	POITOU-CHARENTE

DEPARTEMENTS D'OUTRE-MER	
FR91	GAUDELLOUPE
FR92	MARTINIQUE
FR93	GUYANE
FR94	REUNION

IE	IRELAND
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IE011	BORDER
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IE023	MID-WEST
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IE021	DUBLIN
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IE024	SOUTH-EAST (IRL)
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IE022	MID-EAST
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IE025	SOUTH-WEST (IRL)
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IE012	MIDLAND
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IE013	WEST
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IT	ITALIA
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NORD OVEST	
IT11	PIEMONTE
IT12	VALLE D'AOSTA
IT13	LIGURIA

IT6	LAZIO
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IT2	LOMBARDIA
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ABRUZZO-MOLISE	
IT71	ABRUZZO
IT72	MOLISE

NORD EST	
IT31	TRENTINO-ALTO ADIGE
IT32	VENETO
IT33	FRIULI-VENEZIA GIULIA

IT8	CAMPANIA
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IT4	EMILIA-ROMAGNA
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SUD	
IT91	PUGLIA
IT92	BASILICATA
IT93	CALABRIA

CENTRO	
IT51	TOSCANA
IT52	UMBRIA
IT53	MARCHE

ITA	SICILIA
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ITB	SARDEGNA
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LU	LUXEMBOURG (Grand Duché)
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NL	NEDERLAND
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NOORD-NEDERLAND	
NL11	GRONINGEN
NL12	FRIESLAND
NL13	DRENTHE

WEST-NEDERLAND	
NL31	UTRECHT
NL32	NOORD-HOLLAND
NL33	ZUID-HOLLAND
NL34	ZEELAND

OOST-NEDERLAND	
NL21	OVERIJSEL
NL22	GELDERLAND
NL23	FLEVOLAND

ZUID-NEDERLAND	
NL41	NOORD-BRABANT
NL42	LIMBURG (NL)

AT	ÖSTERREICH
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OSTÖSTERREICH	
AT11	BURGENLAND
AT12	NIEDERÖSTERREICH
AT13	WIEN

WESTÖSTERREICH	
AT31	OBERÖSTERREICH
AT32	SALZBURG
AT33	TIROL
AT34	VORARLBERG

SÜDÖSTERREICH	
AT21	KÄRNTEN
AT22	STEIERMARK

PT	PORTUGAL
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CONTINENTE	
PT11	NORTE
PT12	CENTRO
PT13	LISBOA E VALE DO TEJO
PT14	ALENTEJO
PT15	ALGARVE

PT2	AÇORES
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PT3	MADEIRA
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FI	SUOMI / FINLAND
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MANNER-SUOMI	
FI12	ETELÄ-SUOMI
FI13	ITÄ-SUOMI
FI14	VÄLI-SUOMI

FI15	POHJOIS-SUOMI
FI16	UUSIMAA (SUURALUE)

FI2	ÅLAND
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SE	SVERIGE
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SE01	STOCKHOLM
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SE06	NORRA MELLANSVERIGE
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SE02	ÖSTRA MELLANSVERIGE
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SE07	MELLERSTA NORRLAND
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SE04	SYDSVERIGE
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SE08	ÖVRE NORRLAND
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SE0A	VÄSTSVRIGE
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SE09	SMÅLAND MED ÖEARNÄ
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UK	UNITED KINGDOM
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NORTH EAST	
UKC1	TEES VALLEY AND DURHAM
UKC2	NORTHUMBERLAND, TYNE AND WEAR

SOUTH WEST(UK)	
UKK1	GLOUCESTERSHIRE, WILTSHIRE AND NORTH SOMERSET
UKK2	DORSET, SOMERSET
UKK3	CORNWALL AND ISLES OF SCILLY
UKK4	DEVON

YORKSHIRE AND THE HUMBER	
UKE1	EAST RIDING AND NORTH LINCOLNSHIRE
UKE2	NORTH YORKSHIRE
UKE3	SOUTH YORKSHIRE
UKE4	WEST YORKSHIRE

WEST MIDLANDS	
UKG1	HEREFORD & WORCESTERSHIRE, WARWICKSHIRE
UKG2	SHROPSHIRE, STAFFORDSHIRE
UKG3	WEST MIDLANDS

EAST MIDLANDS	
UKF1	DERBYSHIRE, NOTTINGHAMSHIRE
UKF2	LEICESTERSHIRE, RUTLAND, NORTHAMPTONSHIRE
UKF3	LINCOLNSHIRE

NORTH WEST (UK)	
UKD1	CUMBRIA
UKD2	CHESHIRE
UKD3	GREATER MANCHESTER
UKD4	LANCASHIRE
UKD5	MERSEYSIDE

EASTERN	
UKH1	EAST ANGLIA
UKH2	BEDFORDSHIRE AND HERTFORDSHIRE
UKH3	ESSEX

LONDON	
UKI1	INNER LONDON
UKI2	OUTER LONDON

WALES	
UKL1	WEST WALES AND THE VALLEYS
UKL2	EAST WALES

SOUTH EAST (UK)	
UKJ1	BERKSHIRE,BUCKINGHAMSHIRE,OXFORDSHIRE
UKJ2	SURREY, EAST AND WEST SUSSEX
UKJ3	HAMPSHIRE, ISLE OF WIGHT
UK55	GREATER LONDON
UKJ4	KENT

SCOTLAND	
UKM1	NORTH EASTERN SCOTLAND
UKM2	EASTERN SCOTLAND
UKM3	SOUTH WESTERN SCOTLAND
UKM4	HIGHLANDS AND ISLANDS

UKN	NORTHERN IRELAND
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IS	ISLAND
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LI	LIECHTENSTEIN
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NO	NORGE
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NO01	OSLO OG AKERSHUS
NO02	HEDMARK OG OPPLAND
NO03	SØR-ØSTLANDET
NO04	AGDER OG ROGALAND

NO05	VESTLANDET
NO06	TRØNDELAG
NO07	NORD-NORGE

BG	BÄLGARIJA
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BG1	SOFIA STOLITSA
BG2	SEVERNA BÄLGARIJA

BG3	YUZHNA BÄLGARIJA
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CZ	ČESKÁ REPUBLIKA
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CZ01	PRAHA
CZ02	STŘEDNI ČECHY
CZ05	SEVEROVÝCHOD
CZ06	JIHOVÝCHOD

CZ03	JIHOZÁPAD
CZ04	SEVEROZÁPAD
CZ07	STŘEDNI MORAVA
CZ08	OSTRAVSKO

EE	EESTI
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CY	KYPROS
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LV	LATVIJA
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LT	LIETUVA
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HU	MAGYARORSZÁG
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HU01	KÖZÉP-MAGYARORSZÁ
HU02	KÖZÉP-DUNÁNTÚL

HU05	ÉSZAK-MAGYARORSZÁG
HU06	ÉSZAK-ALFÖLD

HU03	NYUGAT- DUNÁNTÚL
HU04	DÉL- DUNÁNTÚL

HU07	DÉL-ALFÖLD
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MT	MALTA
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PL	POLSKA		
PL01	DOLNOŚLASKIE	PL09	PODKARPACKIE
PL02	KUJAWASKO-POMORSKIE	PL0A	PODLASKIE
PL03	LUBELSKIE	PL0B	POMORSKIE
PL04	LUBUSKIE	PL0C	ŚLASKIE
PL05	ŁÓDZKIE	PL0D	ŚWIETOKRZYSKIE
PL06	MAŁOPOLSKIE	PL0E	WARMIŃSKO-MAZURSKIE
PL07	MAZOWIECKIE	PL0F	WIELKOPOLSKIE
PL08	OPOLSKIE	PL0G	ZACHODNIOPOMORSKIE
RO	ROMÂNIA		
R001	NORD-EST	R003	SUD
R002	SUD-EST	R004	SUD-VEST
R005	VEST	R007	CENTRU
R006	NORD-VEST	R008	BUCUREȘTI
SI	SLOVENIJA		
SK	SLOVENSKÁ REPUBLIKA		
SK01	BRATISLAVSKÝ KRAJ	SK03	STREDNÉ SLOVENSKO
SK02	ZÁPADNÉ SLOVENSKO	SK04	VÝCHODNÉ SLOVENSKO
TR	TURKEY		

Annex 2: Explanatory notes on the budget (Section 2)

A. Introduction

These Notes provide applicants with information concerning the financial procedure, the rules for eligibility of costs and guidance on how to complete Section 2 (Budget) of the application forms for transnational co-operation projects or networks under the following Actions:

- Comenius 2.1 and 3
- Erasmus 1 and 3
- Grundtvig 1 and 4
- Lingua 1 and 2
- Minerva

B. Financial procedure

1. **Presentation of financial data by the Applicant**

For the presentation of the budget, a distinction is made between the following main categories of expenditure (see section D below for details):

1. Staff costs
2. Direct costs:
 - 2.1 Travel and subsistence costs
 - 2.2 Costs relating to the purchase or rental of hardware and equipment
 - 2.3 Subcontracting costs
 - 2.4 Other costs
3. General costs

2. **Financial analysis of proposals**

The *budget proposed* by the co-ordinator is analysed by the Commission in order to:

- a) assess whether it is consistent with the proposed project and sufficiently clear and detailed;
- b) assess whether the proposed budget is appropriate for achieving the concrete objectives / results of the project;
- c) eliminate any item of expenditure which cannot be accepted according to the rules on eligible expenditure;
- d) propose, if necessary, a downward revision of some items of expenditure, where these are considered excessive compared to the nature of the project and/or to the volume of work to be implemented in order to achieve the planned results.

At the end of this analysis, an *approved budget* for the project is drawn up by the Commission. If the proposed budget is realistic and acceptable in relation to Community rules, the proposed budget and the approved budget will be identical, and the Community grant may be the same as the amount requested by the applicant. In most cases, however, the analysis is likely to result in reductions.

3. **Calculation of the Socrates grant**

Once the approved budget has been defined, the grant to be awarded is calculated on the following basis:

- the total grant may not exceed the amount requested by the applicant;
- the total grant may not normally exceed 75% of the approved budget. In most cases, it is likely to be fixed at an appreciably lower level;
- the policy for awarding grants under the specific Socrates Action concerned;
- the available budget.

A table is drawn up by the Commission containing the approved budget and the grant envisaged distinguishing between staff costs and direct costs. General costs may not be covered by the grant.

C. Rules on Eligibility of costs

1. General Principles

The applicant must ensure that:

- all costs presented are necessary for the carrying out of the project and are not unnecessarily high;
- no member organisation of the partnership may derive a profit from financial assistance awarded by the European Community;
- each item of expenditure is only included under one heading.

All costs must be actual expenses, except for the lump sums allowed under these rules. At the end of the project, all expenditure except for items based on lump sums, must be justified by receipted invoices or equivalent accounting documents.

VAT may be included as an item of expenditure if it represents a final cost and is not recoverable under the national VAT system.

2. Eligible costs

Costs incurred by member organisations of the partnership are eligible if they are:

- directly related to the implementation of approved activities contained in the project work plan;
- related to activities involving the countries eligible to participate in the programme.

3. Ineligible costs

The following items of costs are not eligible and should therefore not be included under any headings in the Budget:

- entertainment or representation expenses
- replacement costs of persons involved in the project
- expenses for travel to countries other than those participating in the programme, unless explicit prior authorisation is granted by the Commission
- expenditure incurred before or after the period of eligibility for expenditure indicated in the contract
- expenditure already funded by another source, in particular by other Community funds (if complementarity between funds is envisaged, this must be explicitly justified)
- contributions in kind
- costs of invested capital
- provisions for possible future losses or debts
- provisions for liquidation, winding up of business, breaking off of a lease or legal liabilities
- provisions for contractual or moral obligations
- reserve funds
- debts and bad debts
- fines, financial penalties and costs of legal proceedings.

For Comenius 2.1 and Grundtvig 1 projects, see also the last two paragraphs of D.2.1 of these notes.

D. Principles applied to the different categories and types of costs

1. Staff costs

Staff costs refer to any payment made to a **person attached to a member organisation of the partnership or working on a regular or recurrent basis for the project** (regardless of his or her status). Staff costs must be broken down into categories 1 to 4 of the International Standard Classification of Occupations (ISCO). A list of the occupations included in each of these ISCO categories is given in Appendix A.

Staff costs will be calculated on the basis of the actual daily salary/fees of the employee/service provider, multiplied by the number of days to be spent on the project. This calculation may include, if necessary, all the normal charges paid by the employer, such as social security contributions and related costs, but must exclude any bonus, incentive and profit-sharing arrangements or running costs. **Staff costs may not exceed the normal costs for each staff category in the country concerned.** In any case, the following maximum amounts apply:

- Staff category 1 (maximum amount 450 euros/day)
- Staff category 2 (maximum amount 300 euros/day)
- Staff category 3 (maximum amount 250 euros/day)
- Staff category 4 (maximum amount 125 euros/day)

If it is planned to employ or hire the services of persons, whose costs exceed these maximum amounts, the necessary explanations should be provided when submitting the application.

2. Direct costs

2.1 *Travel, accommodation and subsistence costs*

Only travel directly related to the project and concerning precise and clearly identifiable activities will be considered eligible.

Travel and insurance costs are based on the actual costs incurred. The most economical fares must be used. Several travel agencies should be contacted in order to obtain the best possible prices.

Rail travel (first class if the participant prefers and if this is allowed by the institution concerned) must be used for journeys of up to 400 kilometres, except in an emergency or where a sea crossing is involved.

For journeys of more than 400 kilometres (or less where a sea crossing is involved or in an emergency), air travel may be used. Apex tickets or special fares must be used as far as possible. Air travel costs higher than an economy class fare are not allowed.

The cost of travel by car will be eligible, provided it is calculated according to the following conditions:

- a) private car or taxi: the amount to be considered eligible is limited to the cost of one equivalent first class rail fare (regardless of how many people are travelling in the car);
- b) hired car (class A except where more than two persons are travelling, in which case maximum class B may be used): the actual costs will be eligible. However, a hired car may only be used if no other suitable transport is available.

Travel insurance costs will be considered eligible.

Travel costs incurred outside the countries participating in the SOCRATES programme are not eligible, unless explicit prior authorisation is granted by the Commission.

Accommodation and subsistence costs are eligible provided:

- they are indispensable and reasonable, taking into consideration the place of the stay;
- they are calculated in accordance with the internal regulations of the partner concerned;
- they do not exceed the maximum daily amounts per person detailed in the table below:

Country	Maximum in EUR	Country	Maximum in EUR
BE Belgium	150	IS Iceland	183
DK Denmark	179	LI Liechtenstein	174
DE Germany	127	NO Norway	171
GR Greece	113	BG Bulgaria	157
ES Spain	141	CZ Czech Republic	214
FR France	130	EE Estonia	129
IE Ireland	165	CY Cyprus	100
IT Italy	130	LV Latvia	174
LU Luxembourg	143	LT Lithuania	126
NL The Netherlands	148	HU Hungary	136
AT Austria	122	MT Malta	86
PT Portugal	143	PL Poland	227
FI Finland	156	RO Romania	185
SE Sweden	157	SI Slovenia	148
UK United Kingdom	199	SK Slovakia	164
		TR Turkey	114

The amounts specified in this table include all costs associated with the stay in the country concerned. If there is no overnight stay, the amounts are reduced by 50%.

Within these limits, accommodation and subsistence expenses may be reimbursed on an actual or fixed cost basis. However, if the internal regulations of the institution of the person making the journey impose a lower limit than the amounts in the above table, this lower amount must be used.

Projects are required to pay for up to two trips to Brussels a year from this budget item in order to attend the Co-ordinators Meetings.

For Comenius 2.1 and Grundtvig 1 projects, operating and mobility costs related to the organisation of continuous training activities are only eligible for testing the courses concerned. Costs related to the organisation of continuous training activities will be funded through mobility grants provided within the framework of Comenius 2.2. and Grundtvig 3.

Travel and subsistence costs, within the framework of Comenius 2.1, are not considered as eligible expenditure as far as the students taking part in initial training activities are concerned.

2.2 *Costs related to the purchase, leasing or rental of hardware and other equipment*

The costs relating to the acquisition of hardware and other equipment, whether by purchase, leasing or rental, is only eligible if it is strictly necessary for carrying out the project.

The decision to lease, rent or purchase hardware or equipment must be based on the least expensive method. Several suppliers must be contacted in order to obtain the most economic terms.

In the case of rental or leasing, the cost of any buy-out option at the end of the lease or rental period is ineligible.

Where the purchase of hardware and equipment is allowed, installation, maintenance and insurance costs are also eligible, but limited to the proportional use of the equipment for the project. The whole of the costs for the reference period will be considered as eligible, but adapted according to the percentage of use within the scope of the project.

When the purchase of hardware or equipment is allowed, eligible expenditure is calculated as follows:

- a) for the purpose of calculating depreciation, hardware and equipment will be considered as having a life expectancy of three years, where the purchase price exceeds 1,000 EUR;
- b) costs per annum will be calculated on the basis of a depreciation factor of 33.33%, adjusted to the percentage use in the project concerned. For example, the allowable cost in year one for a piece of equipment worth 10,000 EUR, which is used 50 % for the project, amounts to 1,666 EUR:

$$10\,000 \times 33.33\% \times 50\% = 1,666 \text{ EUR}$$

In the second year of the project, eligible costs will also be 1,666 EUR if the percentage use of the hardware or equipment remains the same. If the hardware or equipment is not planned to be used for the project in the second year, then no cost (depreciation or other) will be considered eligible;

- c) where the total value of the hardware or equipment does not exceed 1,000 EUR, then the full purchase value will be allowed as eligible expenditure for the relevant year, adjusted to the percentage use in the project;
- d) depreciation or purchase costs will not be eligible if the hardware or equipment was purchased prior to the start of the period of eligible expenditure indicated in the contract, except in the cases of renewed projects where the depreciation costs were allowed as eligible expenditure for the previous contractual year.

2.3 Cost of subcontracting, consultancy and commissioning other outside experts

Any amount paid to an outside body **which is not part of a member organisation of the partnership** and which carries out **specific and limited work** for the project, shall be charged to the heading "Subcontracting costs". Work such as translation, interpretation and printing carried out by bodies outside the partnership organisations, is considered as subcontracting costs.

Such expenditure may only be allowed if the staff of the member organisations of the partnership do not have the skills required for the performance of the work concerned.

Subcontracting costs will only be considered eligible if they are in accordance with the provisions of the Agreement concluded with the Commission. If a member of the partnership is required to conclude a subcontracting contract, he/she must enter into an agreement with the subcontractor which assures that the subcontractor will comply with the main Agreement concluded between the applicant and the Commission.

Subcontracting agreements must contain at least the following information:

- subject of the subcontracting
- dates of start and end of subcontracting
- amount to be paid
- detailed description of costs
- work schedule or phases
- payment procedures (one or more instalments, staggered payment, etc.)
- penalty clause(s) in the event of non-fulfilment of the subcontracting agreement or delays in the performance of work.

None of the basic activities of the project may be subcontracted, in order not to distort the partnership concept. For this reason, the beneficiary may not subcontract the management and general administration of the project, and no member organisation of the partnership may subcontract the majority of the activities assigned to it.

If the subcontracting agreement for a particular kind of service (e.g. translations, publications, etc.) exceeds 10,000 EUR, the beneficiary must obtain three competitive quotes, and the partnership must confirm its agreement with the concluding of the subcontracting agreement.

If the beneficiary calls on the services of an outside expert (i.e. a person not on the payroll of the organisations constituting the project partnership) as a consultant, the costs will be eligible subject to the conditions mentioned above and provided that they are strictly necessary for the performance of the project and are reasonable in amount. The remuneration of the consultant should not normally exceed 400 EUR per day (VAT excluded). All the costs directly connected with sub-contracting must be declared under the subcontracting budget heading whatever the nature of the costs concerned (e.g. travel costs). The costs of an independent consultant working full-time or frequently for the project should normally be registered under Staff costs and not under subcontracting.

The total amount devoted to subcontracting may not exceed **30% of the total cost** of the project.

For translations, only expenditure directly related to translations from and into the official languages of the countries formally participating in the Socrates programme will be accepted, unless explicit prior authorisation is granted by the Commission. Translation costs may not be higher than the market prices in the country where the translation is done.

2.4 Other costs

Other costs, not covered by those indicated above, may be allowed, provided they are:

- necessary for the performance of the project
- reasonable in amount
- fully documented and clearly itemised in the application
- not indicated under another category or item of expenditure.

Specific items of expenditure eligible under this heading include:

- bank charges relating to the opening or maintaining of an account established especially for the project, as well as bank transfer and exchange costs relating to receipts and payments for eligible expenditure under the project. However, charges relating to establishing or maintaining lines of credit, overdraft or guarantee facilities are not eligible;
- the hiring of conference halls or training premises, provided that it is strictly necessary for achieving the objectives of the project;
- costs incurred in producing, translating and publishing documents, when those activities are performed by one of the member organisations of the partnership;
- communication costs (e.g. connection to the Internet) in duly justified cases for projects where activities require very intensive use of communications.

3. General costs

General costs are all administrative costs directly related to project management:

- communication costs (postage, fax, telephone, mailing, etc.)
- infrastructure costs (rent, electricity, etc.) of the premises where the project is being carried out, in proportion to the use of these premises by the project
- office supplies
- photocopies

The costs involved in reproducing documents and publishing are included under the budget item "Subcontracting costs" or "Other costs", as the case may be. The item "General costs" may not cover staff costs or any other costs already declared for another item.

General administrative costs must be calculated on the basis of an estimate of the actual costs borne by the beneficiary (all the member organisations of the partnership) for the activities concerned. General costs may not exceed a maximum of **7% of the total cost** of the project.

STAFF CATEGORIES

According to the International Standard Classification of Occupations
(ISCO-88 (COM))**STAFF CATEGORY 1**

- 100 Legislators, senior officials and managers**
- 110 Legislators and senior officials**
- 111 Legislators and senior government officials
- 114 Senior officials of special-interest organisations
- 120 Corporate managers**
- 121 Directors and chief executives
- 122 Production and operation managers
- 123 Other specialist managers
- 130 Managers of small enterprises**
- 131 Managers of small enterprises

STAFF CATEGORY 2

- 200 Professionals**
- 210 Physical, mathematical and engineering science professionals**
- 211 Physicists, chemists and related professionals
- 212 Mathematicians, statisticians and related professionals
- 213 Computing professionals
- 214 Architects, engineers and related professionals
- 220 Life science and health professionals**
- 221 Life science professionals
- 222 Health professionals (except nursing)
- 223 Nursing and midwifery professionals
- 230 Teaching professionals**
- 231 College, university and higher education teaching professionals
- 232 Secondary education teaching professionals
- 233 Primary and pre-primary education teaching professionals
- 234 Special education teaching professionals
- 235 Other teaching professionals
- 240 Other professionals**
- 241 Business professionals
- 242 Legal professionals
- 243 Archivists, librarians and related information professionals
- 244 Social science and related professionals
- 245 Writers and creative or performing artists
- 246 Religious professionals
- 247 Public service administrative professionals

STAFF CATEGORY 3

- 300 Technicians and associate professionals**
- 310 Physical and engineering science associate professionals**
- 311 Physical and engineering science technicians
- 312 Computer associate professionals
- 313 Optical and electronic equipment operators
- 314 Ship and aircraft controllers and technicians
- 315 Safety and quality inspectors
- 320 Life science and health associate professionals**
- 321 Life science technicians and related associate professionals
- 322 Health associate professionals (except nursing)
- 323 Nursing and midwifery associate professionals

- 330 Teaching associate professionals**
- 331 Primary education teaching associate professionals
- 332 Pre-primary education teaching associate professionals
- 333 Special education teaching associate professionals
- 334 Other teaching associate professionals
- 340 Other associate professionals**
- 341 Finance and sales associate professionals
- 342 Business services agents and trade brokers
- 343 Administrative associate professionals
- 344 Customs, tax and related government associate professionals
- 345 Police inspectors and detectives
- 346 Social work associate professionals
- 347 Artistic, entertainment and sports associate professionals

STAFF CATEGORY 4

- 400 Clerks**
- 410 Office clerks**
- 411 Secretaries and keyboard-operating clerks
- 412 Numerical clerks
- 413 Material-recording and transport clerks
- 414 Library, mail and related clerks
- 419 Other office clerks
- 420 Customer services clerks**
- 421 Cashiers, tellers and related clerks
- 422 Client information clerks

