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Linnaeus-Palme

Guidelines for the 2012-2013 and
2012-2014 academic years

Internationella
PROGRAMKONTORET



The Linnaeus-Palme programme
Guidelines for the 2012-2013 and 2012-2014 academic years

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1 INTRODUCTION

1.1 Linnaeus-Palme

Linnaeus-Palme is a programme for teaching staff and students at university first-cycle (undergraduate) and second-cycle (graduate) level that aims to strengthen Swedish educational institutions' cooperation with universities in developing countries in order to expand and increase global contacts within higher education. The programme is open to all subject areas.

The Linnaeus-Palme programme aims to stimulate cooperation based on mutual benefit between higher education institutions in Sweden and developing countries. While the overall objective is to increase participants' international awareness, each project should have a specific academic objective for its exchange. The intention is for mutual cooperation between higher education institutions to benefit participating countries in the long term and to form the basis for a broader partnership between them. Mutual benefit is central to the Linnaeus-Palme programme; the partners should be able to cooperate on an equal footing, despite the fact that there may be a considerable difference in their available resources.

The exchange programme consists of two parts: The Linnaeus grant is for Swedish participants going abroad, named after Swedish botanist Carl Linnaeus, who sent his pupils out into the world to gather information. The Palme grant for foreign participants visiting Sweden, is named after Olof Palme, who was deeply involved in issues relating to developing countries and opportunities for capacity building. The intention is that mutual cooperation between higher education institutions will benefit participant countries in the long term and form the basis for a broader partnership between them.

The programme is administered by the Swedish International Programme Office for Education and Training and is financed by Sida, the Swedish International Development Cooperation Agency. The programme contributes to the achievement of the objectives in the Government's current strategy for capacity development and cooperation by providing excellent capacity and competence of both the Swedish players and stakeholders in developing countries and in that way contribute to the longer-term goal of sustainable poverty reduction. The stimulation of Swedish universities to become more global in their internationalisation by helping to strengthen relations with countries outside Europe and North America is an important aspect of this work.

Countries that qualify for cooperation under the program are those defined as developing countries by the OECD's Development Assistance Committee (DAC).¹ Cooperation is therefore possible with a number of countries in Africa, Asia and Latin America, as well as a number of countries in Central and Eastern Europe.

The programme is in addition to a university's other international cooperations, and is not an all-encompassing measure for developing contacts with new countries.

¹Eligible countries are those defined as developing countries by the OECD's DAC in "The DAC list of ODA Recipients effective for reporting on 2009 and 2010 flows." In accordance with a decision by Sida, eligible countries are those in the categories: "Least Developed Countries", "Other Low Income Countries", "Lower Middle Income Countries and Territories" and "Upper Middle Income Countries and Territories." The full DAC list is available at: <http://www.oecd.org/dataoecd/32/40/43540882.pdf>

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Some self-financing is required from participating institutions, such as for salary costs for participating teaching staff. See sections 1.3 and 2.5.

1.2 General principles

- The programme provides support for long-term bilateral cooperation at the level of institutions² between educational establishments in Sweden and developing countries. The requirement that a project be operated and owned by the institution in question is linked to the need for the cooperation to be integrated in an institution's day-to-day activities. No more than two institutions may enter into the same Linnaeus-Palme contract, but an institution may undertake several Linnaeus-Palme cooperation projects. This is applicable both for the Swedish and the foreign institution.
- The mutual benefit of the cooperation must be well defined and be made clear in the application.
- In its cooperation with the foreign institution it is the Swedish institution that must make the application for the project and that is thus the operationally responsible unit for the cooperation project. This responsibility includes paying out scholarships and grants and collecting, documenting and evaluating experiences and results from the cooperation project, as well as compiling project reports.
- The application process requires educational establishments to make an overall application for the entire establishment, known as a general application, which includes individual institutions' project applications and the educational institution's comments on these applications. The International Programme Office uses this application process to encourage the Linnaeus-Palme programme to be integrated into the international profile of institutions.
- Funds are granted for one or two academic years at a time. Projects that have been in the programme for at least two years can apply for funding for two academic years in the same application, others should apply for one academic year.
- The project application should relate to long-term cooperation and funds may be granted for cooperation projects of up to eight years.
- Each application is assessed individually, it is not possible, to refer to a previous application, the project applied for must be able to be understood from the application in question. The Swedish Programme Office assesses applications together with an external assessment group. The Swedish International Programme Office determines the allocation of funds. A Linnaeus-Palme project that has already been granted funds for eight years can not apply again.
- After a decision is reached, a contract is drawn up between the International Programme Office and the respective institution. The results of the exchange in relation to plans, budget, experience gained etc. must be provided in a final report to the International Programme Office after completion of the contract. Projects that have been granted funding for two years also undertake to submit

²The term institution is used to also describe corresponding units at the educational establishment. If the educational establishment is not organised into institutions, or if the efficient administration of funds requires cooperation at some other level, this must be explained in the general application and signed by the rector. The general principle, however, is that cooperation under the Linnaeus-Palme programme should be undertaken at the level of institutions.

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a less comprehensive interim report in order for the remaining funds to be paid out. Other opportunities for the follow-up and reporting of experience with projects are also arranged.

- Cooperation is usually initiated by a member of teaching staff from the respective institution making a planning trip to the intended cooperation partner. This is done in order to assess the academic and social conditions for students and evaluate the opportunities for a fruitful and long-term exchange of teaching staff and students. Institutions that already enjoy well-established cooperation may be granted funds for an exchange of students and/or teaching staff without the need to also include an advanced planning trip in the application. In such cases the application needs to show that the requirements for the exchange are met. Exact reciprocity in terms of the exchange of teaching staff and students is not a requirement, but a reasonable balance should be sought.
- Participating teaching staff are expected to draw their salary from their home university during the teaching exchange. Participating students' studies entitle them to study grants. No study or course fees should be charged for students.
- Students should be able to transfer their study credits when they return to their home country.

1.3 A constantly developing program

The programme was established in May 2000 and the first applications were received in September 2000. The programme is constantly being developed in cooperation between the International Programme Office, participating educational establishments and Sida. Reporting by institutions and educational establishments provides the basis for the International Programme Office's review of guidelines for the programme. In addition, the International Programme Office, in cooperation with Sida, holds an annual seminar focussing on participants' experience of the programme.

1.4 Types of assistance within the Linnaeus-Palme programme

The programme consists of two different types of grant: The Linnaeus and the Palme grant. The Palme grant is provided to teaching staff and students *coming to Sweden*, while the Linnaeus grant is provided to teaching staff and students from Sweden *travelling abroad*.

The Palme grant is slightly more comprehensive than the Linnaeus grant. It can therefore provide the necessary support to enable the participation of cooperation institutions that have fewer available financial resources. Scholarships for Palme students cover travel and living costs for students visiting Sweden. Palme exchange teaching staff receive grants for additional costs relating to the exchange such as for travel, living costs and accommodation (not salary). The Linnaeus grant for teaching staff and students covers additional costs relating to the exchange and does not cover regular remuneration such as salary and study grants. Please see section 2, and in particular section 2.5, below for rules regarding financial assistance.

1.5 Selection process and decisions

It is the individual Swedish institution that initiates and takes operational responsibility for the cooperation projects. Long-term cooperation between Swedish institutions and institutions in developing countries forms the basis of the

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programme. The heads of the institutions sending teachers/students are responsible for the selection of teaching staff and students.

The International Programme Office assesses institutions' project applications and the education establishment's general application, the quality of the arrangements and their feasibility, and makes a decision on the allocation of funds. For projects that have previously been granted funds, the project's history is factored into the assessment. A detailed list of the criteria and prioritisation principles for the Linnaeus-Palme programme is available in the document "Criteria and prioritisation principles for the assessment of applications under the Linnaeus-Palme programme for the 2012-2013 and 2012-2014 academic years."

An institution that applies for funding must have a long-term perspective. In addition, mutual benefit and the intention for the exchange to be reciprocal are also important selection criteria. The assessment of applications places a strong emphasis on previous experience of cooperation activities. The International Programme Office also takes into account efforts to broaden cooperation to subjects, countries and educational establishments that have not previously been represented, or that are underrepresented, within the programme.

Students should be provided with the necessary support to make the best of the period of study at the partner institution, both academically and socially. Applications must therefore include a plan for the integration of incoming students in the student social environment. Participating institutions must guarantee in their applications that credits for the studies undertaken are transferrable to other institutions.

Applications must inform the International Programme Office of the aim of the project, its long-term objectives and its content in the form of courses and the type of tuition (or planned meetings and visits with regard to advance planning and evaluation trips).

1.6 Application process

An application for funds from the Linnaeus-Palme programme consists partly of the educational establishment's overall application – *the general application*, and partly of the institution's application – *the project application*.

1.6.1 General application

The educational establishment sends the application to the International Programme Office after it has compiled the institutions' project applications, which must be provided as appendices. The general application must also include the educational establishment's comments on the individual project applications and their role in the educational establishment's international work.

1.6.2 Project applications

Project applications are made by the relevant Swedish institution and are submitted centrally to the educational establishment to be forwarded to the International Programme Office. Only project applications included in the educational establishment's overall application are considered by the International Programme Office.

Under the programme it is possible to apply for funds for planning trips, teacher exchanges, evaluation visits and language training for teachers and student exchanges.

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Project applications must always contain:

- Information about collaborating institutions and previous or existing contacts
- Description of objectives, aims, expected results and mutual benefits
- An enclosed statement from the foreign institution

With regard to planning trips, project applications must include:

- The names of participating teaching staff
- The approximate dates of the trip
- Description of arrangements for the planning trip and its role within the cooperation project

With regard to the exchange of teaching staff, project applications must include:

- The names of the participating teaching staff
- The approximate dates of the exchange
- The scope of the Swedish teacher's duties at the foreign institution
- The scope of the foreign teacher's duties at the Swedish institution
- Description of arrangements for the teaching exchange, courses, type of tuition and the role of the course and tuition in the cooperation project
- Details of any language training and the names of those teachers that need to take a language course.
- Budget for the exchange in both directions (please also see the rules on financial assistance, section 2.5)

For student exchanges, the project application should also include:

- The subject area and the time period for the student exchange
- Description of the student exchange arrangements, a preliminary course of study, the transferability of credits, preparations, selection and reception of students
- Budget for the exchange in both directions (please also see the rules on financial assistance, section 2.5)

Projects that have previously been granted funding for at least two years can apply for two academic years. The International Programme Office will decide if the applications for two years will be granted for a period of one year or two years. Projects granted funding for two years, will receive 50 per cent of the total grant which will be paid after the contract is received by the International Programme Office. The remaining 50 per cent will be paid when the interim report has been approved by the International Programme Office. It is not possible to apply for more funding for the 2013-2014 round of applications for projects that have been authorised funding for a period of two years.

1.6.3 Application dates

Applications for funds from the Linnaeus-Palme programme must be made using the form available on the International Programme Office's website. The educational establishment's overall application must be received by the International Programme Office no later than **November 15, 2011**. An original copy of the application must be sent and must have arrived at IPK or be postmarked no later than 15 November 2011. Late applications will be rejected. General information about the Linnaeus-Palme programme is also available on both the International Programme Office and Sida websites.

1.7 Insurance

Both students and teaching staff travelling from and to Sweden should have insurance. Most Swedish educational establishments are able to provide insurance

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for students and teaching staff travelling to and from Sweden via the Swedish Legal, Financial and Administrative Agency (Kammarkollegiet). Swedish teaching staff are usually already insured through the Swedish Legal, Financial and Administrative Agency. Please see <http://www.kammarkollegiet.se>

1.8 Travel advice

Grant recipients are responsible for finding out, both before and during their travel abroad, about the Swedish Ministry for Foreign Affairs' (MFA) travel advice regarding travel to the country and/or region where the recipient is to be posted (www.regeringen.se).

1.9 Ethical review

An ethical review is mandatory for all projects in which a cooperation project (tuition/studies) includes experiments/studies involving humans or animals.

Tuition/studies in Sweden that relate to experiments/studies involving humans require approval from the local research ethics committee, and those relating to experiments/studies involving animals require the approval of the committee on animal research ethics. A copy of the approval must be provided with the application.

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The current application round is for the 2012-2013, with a contract period from June 1, 2012 until September 30, 2013 - and 2012-2014 academic years – with a contract period from June 1, 2012 until September 30, 2014.

2.1 Planning trips

The aim of these trips is to plan for the forthcoming teacher and student exchange by ensuring the quality of and discussing future exchange periods in terms of both the academic aspects and social aspects for the students, and to examine what academic values each institution can contribute to the other.

The planning trip should be made by established members of teaching staff at the respective institutions. A member of administrative staff with responsibility for international activities may also participate. The aim of this is to achieve the integration within the institutions that is a required for further exchanges.

The programme provides support for visits by up to two participants from each institution. At least one of the participants must be a member of teaching staff. The planning trips must comprise at least one week's stay (including travelling time). A report on experiences from planning trips should be provided internally within the institution and to the IPC.

2.2 Teaching exchanges

The exchange of teaching staff is aimed at teaching staff working with first-cycle and second-cycle studies, and funds from the Linnaeus-Palme programme may not be used for anything but tuition at first-cycle and second-cycle level. This also applies to foreign teaching staff visiting Swedish university institutions. The exchange may take place simultaneously, but this is not essential. Funds for research by or skills development for teaching staff, for example in the form of teacher seminars, are not provided within the Linnaeus-Palme programme. Teachers carrying out exchange must be established in and employed by the institution.

Teaching exchanges relate to the tuition of courses within normal education at first-cycle and second-cycle level. Normal education means that the course should be part of the standard course offering at the institution. Tuition must cover a minimum of 10 hours a week. Tuition may consist of lecturers, seminars, or group or individual supervision of students. Time for anything other than tuition at first-cycle or second-cycle level, such as teacher seminars, research, skills development, planning for future exchanges etc., may not be counted as part of tuition time. The period of the exchange should be no less than 3 weeks (21 days including travel) and no more than 8 weeks. Up to three members of teaching staff from each institution per academic year may be granted support. A member of teaching staff may only participate in one exchange per academic year. Institutions should aim to diversify participation in exchanges among their staff.

The aim of the exchange at teaching staff level is also to mutually increase knowledge about, understanding of and cooperation between the institution in Sweden and the cooperation institution. In addition, the incoming teacher must cooperate with the host institution's teaching staff in order gain an understanding of the feasibility for a student exchange.

Language training

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Funds for language training may be sought by those teachers who are to participate in a teaching exchange. The programme grants funds for two weeks' intensive training in order to improve existing language skills. Foreign teaching staff in Sweden are expected to teach in English and may apply for funding for an English language course. If an application includes an application for funds for a language course, the teaching staff must be named, or in its application the institution (under F, "teaching exchange/language course") should describe the general language skills at the institution and the need for language training. The latter is mainly intended for projects in which the foreign cooperation institution needs to improve its language skills.

All exchange teachers must provide an internal report at the Swedish institution about their experiences from the exchange. Teachers' experiences should be summarised in a report to the IPC.

2.3 Student exchanges

The aim of these exchanges is to provide participating students with a beneficial academic education at first-cycle and second-cycle level, international experience and an understanding of different cultures. Student exchanges are usually preceded by a planning trip and/or a teaching exchange when the course of study and course credit transfer issues have been clarified.

Student exchanges within the programme are intended for students at first-cycle and second-cycle level, and are only available for those studying fulltime. Linnaeus students must be Swedish citizens or hold a Swedish permanent residence permit. Citizens of the Nordic region need to have been registered in Sweden for at least one year at the time of their departure. If a Palme student is not a citizen in the country of the educational establishment, he/she must be a citizen of one of the countries in the above list of eligible partner countries in order to participate in the exchange.

The exchange must be for at least twelve weeks and at the most 40 weeks on courses within normal education at the respective institution. It is permitted to use a maximum of two weeks of the total exchange period for welcome arrangements and/or introductory or language courses in the host country. These two weeks do not need to be credited by the student's home institution. The duration of the exchange cannot be below 12 weeks and corresponding at least ten weeks full-time studies shall be credited by the student's home institution. Credits for studies must be transferrable after students return to their home country. The programme can provide support for up to four student exchanges from each institution per application. A student may only participate in one student exchange. The Linnaeus-Palme programme relates to participation in normal tuition, i.e. a standard course offering. Funds are not granted for field work or the gathering of material for a dissertation other than if the dissertation is supervised and graded in close collaboration with the host institution. Any practical work must be supervised by the host institution and students must be integrated at the institution. Such information must be provided clearly in the application.

The institution sending the students is responsible for the selection of students. Students must, however, have studied for at least one year at higher education level before travelling in order to be considered as an exchange candidate.

Students must be offered information by their institution about the partner university and the country in question. This can, for example, be administered by the teacher(s) that carried out the planning trip or the teaching exchange. Palme students are expected to participate in the welcoming arrangements that are

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usually provided for exchange students at each the respective Swedish educational establishment.

Both Palme and Linnaeus students must provide a written report about the results and experiences of their stay abroad. For Swedish students this should be after they return home, and for foreign students this should be before they leave Sweden. Students' experiences should be summarised in a final report to the IPC.

2.4 Evaluation visits

When a project is granted funding for at least three years it is possible to apply for funding for an evaluation visit. The aim of this is to jointly follow up on and evaluate those activities carried out within the project, both from an academic and an administrative perspective. When a project has been granted funding for five years, the IPC makes greater demands in terms of results and spreading the benefits of the project. An evaluation visit provides an opportunity to develop and provide quality assurance for a project.

An evaluation visit should be carried out by teaching staff that have participated in the planning and implementation of the project. A member of administrative staff with responsibility for international activities may also participate. The programme provides funding for the participation of up to two people from each institution. At least one of the participants must be a member of teaching staff. The evaluation visit must comprise at least a week's stay, including travel. A report on experiences from the evaluation visit should be provided internally within the institution and to the IPC.

2.5 Rules on financial assistance

The programme should be viewed as complementary to existing grants and scholarships in order to strengthen a university's international contacts and exchanges. A certain degree of self-financing is required of participating institutions. Financial assistance is provided as set out below and applies for the implementation of the programmes activities. In addition, participating Swedish institutions receive an administration grant of SEK 1,000 per participant in the teaching exchange and SEK 2,000 per participant in the student exchange. Other costs relating to the exchange, such as salaries and administrative fees, are not paid.

2.5.1 Planning trips

A grant of SEK 20,000 per person is paid as a standard payment for a return journey, accommodation and living costs for a maximum of four participants, up to two from each institution. The maximum grant is SEK 80,000.

2.5.2 Teaching exchanges

Financial compensation is paid in respect of budgeted expenditure for travel and living costs for up to three members of teaching staff from each institution per application. Costs are paid for the lowest-cost suitable economy class ticket (that allows for changes to the booking of the return journey). For living and accommodation costs for teachers from a Swedish educational establishment (Linnaeus teachers), funding is provided at a rate corresponding to the subsistence allowance for service abroad.³ Foreign teachers (Palme teachers) receive a grant of

³For the subsistence allowance, the Swedish National Tax Board's rules on subsistence allowances apply (Swedish National Tax Board regulation 1990:1293 Chapt. 2, § 2). The amount of the allowance is calculated based on the standard allowance stipulated at the time that participants are notified. Details of the current standard allowance are available at: <http://www.skatteverket.se/>

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SEK 800 a day for additional living and accommodation costs. The host institution is expected to arrange accommodation at a reasonable cost for visiting teaching staff.

In the event that the teaching exchange lasts for fewer days than granted, repayment of the funds provided will be required at a daily rate corresponding to the subsistence allowance for Linnaeus teachers abroad and at a rate of SEK 800 a day for Palme teachers visiting Sweden. Exchanges shorter than the stipulated minimum period of 21 days will not be approved. If the period of the exchange is less than 21 days without a valid reason, the institution may, in addition to a demand for repayment, also be denied continued support for any new application.

In most cases, the Act on Special Income Tax for non-residents (1991:586; SINK) is applied for the payment of the subsistence allowance and travel costs of teaching staff visiting Sweden.

For teaching staff who participate in language training, costs are covered in respect of travel (the lowest-cost economy class ticket) and course fees (including accommodation), as well as for a subsistence allowance for service abroad in accordance with the Swedish Tax Board's rules. Courses may consist of a one- to two-week intensive course. The costs for the language course must be reasonable. Palme teachers who participate in a language course in Sweden receive a subsistence allowance of SEK 800 a day.

2.5.3 Student exchanges

The Linnaeus scholarship for students is SEK 25,000 for one term (i.e. 20 weeks) and SEK 40,000 for two terms (40 weeks). The Palme scholarship for foreign students covers travel and living costs and is SEK 53,000 for one term and SEK 89,000 for two terms. A reduced scholarship is paid for shorter exchange periods. It is presumed that the host institution will assist scholarship-holders with practical arrangements, such as accommodation.

In the event that a student exchange lasts for a fewer number of weeks than granted, repayment of the funds provided will be required, corresponding to a rate of SEK 750 per week for Linnaeus students studying abroad and SEK 1,530 per week for Palme students studying Sweden. Exchanges shorter than 12 weeks will not be approved. If the period of the exchange is less than 12 weeks without a valid reason, the institution may, in addition to the demand for repayment, also be denied continued support for any new application.

The Swedish institution applies for funds for both Swedish and foreign students and is responsible for paying out the funds granted.

2.5.4 Evaluation visits

The principles for evaluation visits are the same as for planning trips. One or a maximum of two participants per institution may be granted funds, and payment is based on a standard figure of SEK 20,000 per participant.

2.5.5 Additional funding for disabled participants

In addition to the above, it is also possible to apply for additional funding for increased costs relating to exchanges for disabled teaching staff and students. Details must be provided separately in the application.

2.5.6 Payment of allocated funding

The funding allocated is specified in the International Programme Office's decision and in the contract signed between the institution and the International Programme Office for each individual project. Funds are paid to the account of the educational

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establishment after the contract has been signed and returned to the International Programme Office.

Projects granted a two year contract will receive a second payment when the interim report has been approved by the International Programme Office.

2.6 Reporting

Reports on activities within the Linnaeus-Palme programme shall be provided, partly internally at the Swedish institution, and partly to the International Programme Office. This reporting is important in order to spread knowledge about experiences from exchanges and increase awareness of the project.

Projekt som beviljats medel för två läsår rapporterar två gånger; en interimrapportering ca ett år efter att kontraktet trätt i kraft och en slutrapportering efter att kontraktstiden löpt ut. Projekt som beviljats medel för ett år rapporterar endast efter att kontraktstiden löpt ut.

2.6.1 Interim reporting

Projects that have been granted a two-year contract must submit an interim report that must be received by the International Programme Office no later than **30 May 2013**. Report forms will be available on the International Programme Office's website in good time before the reporting date deadline. The interim reports from each seat of learning must be sent in together to the International Programme Office. Projects that do not require an interim report or do not intend to continue a second year, must provide a final report no later than 15 November. Other projects will receive a final payment in order to continue the cooperation during the second year.

2.6.2 Final report

The final report for projects that have been granted for a one-year contract must be submitted to the International Programme Office no later than **15 November 2013**. Projects with a two-year contract must submit a final report no later than **15 November 2014**.

2.6.3 The university's overall final report

The departments' final reports form a part of the university's overall reporting. Two-year projects which earlier in the year submitted an approved interim report must be included on a separate list in the university's overall report.

Original copies of all reports must be submitted. If the authorised activities have not been carried out in accordance with the contract, the reason must be stated in the report. If a visit is made at the participating departments, the International Programme Office may request support documentation for the specified amounts and exchange periods. The support documentation must be retained for 5 years.