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Action Plan for Libraries

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**Action plan for libraries: guidelines and criteria
for projects**

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Action plan for libraries: guidelines and criteria for projects

Objective of the guidelines

This document provides a series of guidelines for the preparation of projects under the proposed action plan for libraries in order to ensure that these projects will be eligible to be considered for funding under the provisions of the plan. In order to be a candidate for funding, a project will need to be in line with the criteria specified below. These guidelines take in all aspects and levels of project proposal preparation and development in order to give an indication of the methodology and structure likely to be required. In practice, proposals are developed in several stages and not all the information covered in this document will necessarily be required at the outset or in as much detail. It is also foreseen that additional practical help will be provided where appropriate in the form of workshops and supporting documents. This document should be read in conjunction with the 'Plan of action for libraries in the European Community' and its content is subject to the provisions to be specified in the Council Decision adopting the plan.¹

¹ The draft 'Plan of action for libraries' on which this guidelines document is based was distributed widely from August 1988 onwards. 'Libraries' is now one of the areas in the specific programme 'Telematics systems in areas of general interest' within the 'Third framework programme for research and technological development'. The Community libraries' action will thus be subject to the provisions specified in the Council Decisions on the framework and specific programmes.

BACKGROUND

The proposed action plan for libraries in the European Community provides a framework for actions designed to have a catalytic effect on the problems affecting the cost-effective and harmonious provision of modern library services throughout Europe. This framework comprises five action lines, each of which makes an essential contribution to the resolution of these problems. The lines are:

Action line 1: Library source data projects — primarily in the field of machine-readable national bibliography and union catalogues but also including the retrospective conversion of catalogues of internationally important collections.

Action line 2: Projects to further the international linking of systems.

Action line 3: Projects to stimulate the provision of innovative services using the new technologies.

Action line 4: Projects to encourage the development and production of commercially viable products, services and tools specifically for libraries, or prototypes of such.

Action line 5:² Projects to stimulate exchanges of experience and dissemination of knowledge between those responsible for libraries in Member States and provision of targeted support for the preparation of projects under the other action lines.

In order to have the required catalytic impact and to promote harmonization it is important that the projects selected be strategic and not haphazard in their effect. To ensure this, the national focal points in the Member States will have a role to play in proposal submission. It is anticipated that the national focus may take the role of operating selection procedures or filtering of project proposals.

The disparities between Member States could result in inequality of opportunity to benefit from the plan, since not all have the same resources to prepare proposals. Certain safeguards are likely to be applied, regarding the distribution of projects per action line in order to ensure a European-wide effect and these should be borne in mind by organizations preparing projects. Action line 1 foresees at least one national bibliography-type project and at least one and preferably two retrospective conversion projects per Member State. For action line 2, there should be opportunity for at least one cooperating partner from the southern countries to be brought into the project, if not at the outset, then at a later stage. Under action line 3, a minimum of two or three projects per Member State is anticipated. Special effort will be made under action line 5 to provide assistance to southern countries in preparing proposals.

² This is no longer a separate action line. However, it remains logically valid since the actions it envisaged are provided for under the general measures foreseen by the programme.

ORGANIZATIONS ELIGIBLE

Proposals may be submitted by the following organizations: libraries, library authorities and bodies responsible for libraries; public and private sector organizations providing services to libraries, including utilities, cooperatives, library system suppliers, book-trade and appropriate consultancy services; organizations or bodies working in conjunction with one or more libraries, such as a university department, a library school and similar bodies.

Structure of guidelines document

The document is divided into three sections as follows:

Section A: Scope and content of projects

- (i) General criteria relating to the scope and content of projects.
- (ii) Action line specific criteria relating to the scope and content of projects (detailed action line by action line).

These criteria determine the validity of the project within the context of the action plan.

Section B: Practical considerations

This section lists criteria of a practical nature relating to the development and presentation of the project plan.

These criteria determine the viability of the project.

Section C: Mechanisms

This section gives background information on the likely mechanisms through which projects will be solicited by the Commission of the European Communities. It gives an indication of the means by which libraries may be invited to present project proposals, together with the expected time-cycles likely to be applied to each action line.

SECTION A

1.0 OBJECTIVES OF PROJECTS PROPOSED

- 1.1 Projects proposed should be in line with the overall aims of the Council Resolution of 27 September 1985, with the goals expressed at the hearing in February 1987 and with the aims of the Council Decision adopting the action plan. These focused on the development of access by more users to library holdings in a cost-effective way and on the optimal use of library resources, through the proper application of new technologies, through cooperation between library bodies at Community level and through harmonization of initiatives. Actions were required which would have a demonstrator effect at national level but also have a European, Community-wide impact; which would have short-term visible results; which would enhance services to users while increasing cost-effectiveness; and which would help alleviate some of the discrepancies between countries in provision of modern and technology-based library services.
- 1.2 Projects proposed should demonstrate that they contribute effectively to at least one and preferably more of the following four major objectives of the plan of action:
 - (i) promotion of the availability and accessibility of modern library services;
 - (ii) accelerated but cost-effective penetration of new technologies;
 - (iii) promotion of standardization;
 - (iv) harmonization and convergence of library policies.
- 1.3 Projects should have a clearly demonstrable and tangible effect on these objectives within the short term. What this effect is expected to be should be clearly stated from the outset.
- 1.4 Projects must also fit within the framework of the action lines and must comply with the objectives of the relevant specified action line. More complex projects, embracing the objectives of more than one action line, must demonstrate clearly how and which component parts meet the individual action line requirements.

2.0 COMPONENTS OF PROJECTS PROPOSED

Projects must contain the following elements: cooperation; innovation; and use of new information technologies.³ In addition, they must demonstrate clearly adherence to standards and should be compatible with and complement related national/international activities and policies.

³ Projects must also put more explicit emphasis on their contribution to applied research and development.

2.1 **Cooperation**

2.1.1 The scope of the cooperation should be clearly identified. Cooperation should in the first instance be international (i.e. European). The plan also, however, aims to foster national (or regional) cooperation and wider international (beyond the EC) cooperation and, where present, such relationships should be clearly identified.

2.1.2 The nature of the cooperation may be direct or indirect, depending in part on the precise provisions of the action line under which the project is proposed. Direct cooperation will normally take the form of joint projects and proposals from the cooperating partners: there is no hard and fast rule on the number of partners needed but Commission experience points to a minimum of three partners in three Member States. Cooperation may also exist indirectly if the project can demonstrably serve cooperation through spin-off effects. In this case, projects may originate with a single organization.⁴ Such projects may take the form of: an experimental service, which can be duplicated elsewhere in Europe or transferred to a different subject domain; extending access to collections; and lending support to standardization by validating technical solutions through prototypes, etc.

2.2 **Innovation**

2.2.1 Projects should have a component of innovation which should be clearly identified.

2.2.2 The definition of innovation is flexible, and will also vary according to local circumstances in order to accommodate the discrepancies in current library service provision across Europe. Examples of the form innovation could take are:

- (i) a new type of service not previously offered, provided it is seen to be cost-effective;
- (ii) the application of new techniques and methods;
- (iii) a new use for an existing tool;
- (iv) a new form of cooperation (legal arrangement, repartition of tasks etc.);
- (v) a new type of cooperative system (e.g. distributed database);
- (vi) new types of partnership.

2.2.3 A project will not be considered innovative if the form of innovation cannot be given wider applicability, for example in a different subject area or across different types of libraries and organizations.

⁴ In cases of indirect cooperation, at least one partner organization (test-site for replicability, transfer of knowledge, etc.) in another country must be cited in the proposal.

2.3 Use of information technology

- 2.3.1 Projects should be directly related to the use of new information technologies in libraries. The IT component of the project should be clearly identified.
- 2.3.2 This IT component should normally take the form of direct application of a new information technology, either through new uses of technologies already present in libraries or through the introduction of technologies new to libraries. Projects should not be concerned with the development of new base technologies or with basic research in the field of technology. It should be noted that not all equipment costs are deemed 'allowable' or eligible for subsidy under the provisions of the plan and more information on this is given in Section 4.5 below.
- 2.3.3 The IT component may also, on occasion, take the form of contributions to the ground-work necessary to sustain the use of IT in libraries, in an international context. Examples of such could be the work towards the development of appropriate standards and norms or support for the development of appropriate technical skills among library workers.

2.4 Standards

- 2.4.1 Proposals should demonstrate their adherence to and application of existing international standards and accepted professional norms. International standards and norms should be given preference over comparable, but different, national ones. Where appropriate a case should be made for the conversion from national to international standards and for the level of interface required between them.
- 2.4.2 The application or development of standards must conform to the Community IT standards policy.
- 2.4.3 In areas where no standards, norms or guidelines exist, but where these would be useful, the case for developing such tools at European level should be clearly argued.
- 2.4.4 It may be that in certain specific areas existing standards or norms have become out-of-date or need upgrading and can therefore no longer be applied without difficulty. In such cases, the need for R&D work to update or upgrade the relevant standards or policy must be argued explicitly.

2.5 Compatibility with related activities

- 2.5.1 Projects must be set in the context of policies and ongoing activities at national level; their compatibility with these, as defined by the appropriate authorities, must be clearly demonstrated. Where a project deviates from national policies and activities or where none such exist, a strong case should be argued for the need, budgets and usefulness of the project within the national context.
- 2.5.2 Projects must also take account of relevant Community policies, in particular the IT standards policy of the Commission. In addition, projects should be compatible and not

conflict with other relevant Community programmes, such as Esprit, Erasmus, Comett, Delta, etc.

3.0 ACTION LINE SPECIFIC CRITERIA

Projects must satisfy the objectives outlined for the action line under which the project proposal is being made. Projects must also meet the requirements for cooperation outlined for the action line (where these are explicitly stated) and must also be submitted by organizations with competences and functions valid to the action line.

3.1 Action line 1

3.1.1 There are two major objectives under this action line, both dedicated to the creation of machine-readable source data: projects must demonstrate that they contribute to the provision of new machine-readable national bibliographies, to enhancements to existing ones or to national union catalogues; or that they improve access to collections of international interest, through properly targeted retrospective conversion activities.

3.1.2 National bibliography projects must be in alignment with national priorities.

3.1.3 Cooperation may be both direct and indirect. National bibliography or union catalogue projects in particular may wish to demonstrate cooperation indirectly, for example, by enriching access to the European basic resource or by developing new services and enhancements capable of replication elsewhere.

3.1.4 Organizations submitting projects must demonstrate that they are predominant in the provision of national bibliographic data or that their collections are of demonstrable international interest.

3.2 Action line 2

3.2.1 Projects must stimulate innovation, through the development of technical standards, the development of pilot links between systems and the provision of test-beds and demonstrations for OSI.

3.2.2 Cooperation should take the form of joint proposals between at least two and preferably more partners in different countries.

3.2.3 Organizations submitting projects should be providing existing network services to libraries or running a library network themselves.

3.3 Action line 3

3.3.1 Projects must demonstrate that they stimulate demand for new and innovative services. They should contribute to the speedier introduction of such services and to their eventual acceptance by funding agencies.

- 3.3.2 Projects should include methodologies for testing the demand for the new services proposed.
- 3.3.3 Cooperation may be indirect, in which case the replicability of the services should be clearly demonstrated.
- 3.3.4 Organizations submitting proposals must have an identifiable user-base, relevant for the services proposed.
- 3.4 **Action line 4**
- 3.4.1 Projects must demonstrate that they will contribute to the development of new products and tools for libraries which will help in meeting the other objectives of the plan.
- 3.4.2 Projects should also contribute to the development of the market for such products.
- 3.4.3 Organizations submitting projects should demonstrate a technical capability for the development of such tools for libraries, either through an already-established place in the market or through specific relevant competences, such as expertise in software development.
- 3.5 **Action line 5⁵**
- 3.5.1 Projects should demonstrate that they will meet at least one of the following objectives: stimulate library-oriented research; create a new international awareness and dimension; contribute to the modernization of the skills of library workers; provide essential preparatory work for projects under the other action lines; or provide support for the preparation of projects under the other action lines.
- 3.5.2 Cooperation may be demonstrated in a variety of ways, with seminars, workshops and exchanges of personnel explicitly noted in the plan.
- 3.5.3 Projects may be proposed by organizations, by individuals or by the Commission itself.

⁵ See footnote 2.

SECTION B

4.0 PRACTICAL FACTORS AND CRITERIA FOR PROJECT PROPOSALS

Project proposals submitted will have to contain information by which the viability and technical soundness of the project may be substantiated. Rules will be laid down in due course, covering the formulation and presentation of project proposals and detailing the information needed to assess viability, according to circumstance and type of project. However, in general, such information is expected to cover: project description; development plan for the project; technical feasibility or soundness; resources; financial plan; project management; the property rights of results; information dissemination strategy; and the evaluation of results. The following paragraphs outline what each of these is likely to involve. Though not all the data may be formally required at the preliminary stages (depending on the rules mentioned above), proposal preparation should take account of these likely eventual requirements.

- 4.1 **Project overview.** Projects proposed will be expected to provide a project overview, covering: the project objectives, verifiable against the criteria outlined above; the scope of the project; the results expected; and the potential for continuity of the work beyond the period of EC support.
- 4.2 **Development plan.** Projects will have to contain a development plan, which sets out clearly: the methodology proposed; the work breakdown structure (the different pieces of work and their relationship to each other) and the distribution of work; the overall timescale for the project and a timetable detailing the main critical points in the project's evolution. The duration of projects will be variable. Timescales for projects should, however, take account of the time-cycles likely to be relevant to the action line under which funding is sought (see Section C below). Projects will not be funded beyond the duration of the plan.
- 4.3 **Technical soundness.** The technical aspects of the project should be clearly set out in order to demonstrate the technical soundness of the work proposed. The nature and extent of any research and development work should be clearly indicated.
- 4.4 **Resources.** Project proposals are required to demonstrate that the necessary staffing and organizational resources can be provided to carry out the project. Information should include the support facilities to be allocated to the project covering staff, organizational support and equipment. External expertise may also be used, in which case the conditions for sub-contracting work should be stated. The competence of the proposing organization(s) to carry out the project and the competence of the available staff to fulfil the work and manage the project should be clearly set out.
- 4.5 **Finance**
 - 4.5.1 Projects proposed will have to include a detailed financial plan with costing estimates for the work proposed. This should cover labour costs, external contractor costs, the costs of cooperation, including travel and meetings, overheads and certain allowable equip-

ment costs. Not all costs are necessarily regarded as 'allowable', i.e. eligible for subsidy, and precise guidelines on these and on excluded costs will be issued at an appropriate later date. Certain equipment costs may be allowed, such as the leasing of specialist hardware, the acquisition of software licences required exclusively for the purposes of the project, and the development of prototypes; the budgeted elements of the project should not, however, include the acquisition of basic equipment such as a turnkey library automation system needed to run a library.

- 4.5.2 The repartition of costs across the participating partners will need to be clearly identified.
- 4.5.3 The amount requested from the CEC should be stated, taking account of the rules on percentages and ceilings applied to each action line. At the same time, sources of matching funding should be identified, including funding from the participants themselves. Participants may contribute some funding in kind, by making available personnel, library resources etc. The level of available funding from the CEC will also depend on the budget allocated to the action line, the number of projects deemed desirable, in addition to the percentages⁶ and ceilings envisaged for the action line. Full details of these as currently envisaged are given with each action line in the plan.
- 4.5.4 The ability of the proposing organization to exercise financial control for the project should be made clear, with references, where appropriate, to the organization's financial standing.
- 4.6 **Project management.** Information will be expected on how the project will be managed and on the methods of progress-reporting to be applied. Progress-reporting to the Commission should be regular and timely, and linked to the critical points noted in the project development plan. The proposal should contain details of satisfactory procedures for subcontracting and procurement where appropriate. Organizations presenting joint proposals should clearly establish the nature of their partnership, such as whether they are equal joint contractors, whether one is a main contractor with others as subcontractors, etc. The agreement between the participating partners will need to be provided, signed by suitably authorized persons from the organizations concerned.
- 4.7 **Information dissemination strategy.** Dissemination of information about the project, its progress and its results, is essential within the context of the plan, not least to encourage any multiplier effects. Project proposals will be expected to contain a listing of the expected results or outcomes, together with the methods proposed for their dissemination. Results may take the form of reports, prototypes, specifications, technical documentation etc.; dissemination may be through publication, through journal articles, through appropriate licencing agreements for prototype software, etc.
- 4.8 **Evaluation of results.** The results of projects will be evaluated in order to demonstrate that projects meet their defined objectives. Guidelines on possible applicable evaluation mechanisms will again be issued later; however, project proposals will be required, where possible, to give an indication of acceptance and review procedures to be implemented.

⁶ In the framework programme, the rate of Community contribution for shared cost projects will not normally be more than 50%.

SECTION C

5.0 MECHANISMS FOR PROJECT PROPOSALS⁷

This section lists briefly the methods which the Commission might use to identify projects and to solicit project proposals. Different mechanisms will call for different levels of response; however, those proposing projects will probably find it helpful to develop their ideas and proposals in advance in accordance with the guidelines set out above, even though not all the information may be required at the preliminary stages. When the plan is implemented, more detailed guidelines, detailing the form and level of response required to each mechanism and the evaluation criteria applicable, will be issued. Various selection mechanisms will also be set up; some may operate at national level to filter projects, typically via the national focus; other selection processes will be invoked at Community level. Projects selected will be the object of detailed negotiations with the Commission on the basis of the formal presentation of the proposal; these negotiations will lead to formal contracts. The contracts are composed of several parts including the formal work specification (sometimes referred to as the 'technical annex'). Further guidelines on preparing a technical annex will be issued at the appropriate time.

The range of mechanisms available is designed to act both in general areas and in specific contexts, combining both effectiveness of proposal identification and development with flexibility. Though other additional channels of information may be used, many of the mechanisms use the Official Journal; where appropriate this is noted in the paragraphs below.

- 5.1 **Call for declaration of interest.** The purpose of this is to encourage ideas in order to identify orientations and areas of more specific interest; they may be developed subsequently into calls for proposal. The response calls for a statement of objectives, scope of the project, and an estimation of cost. Calls for declaration of interest are published in the Official Journal.
- 5.2 **Call for proposal.** Calls for proposal operate within a more specific context or area of action; this could be either an action line or a defined area of interest within an action line. The call for proposal will contain information on the scope and objectives of the projects sought, for example in the form of a project plan which the projects proposed should address, and on the specific criteria to be satisfied; also provided will be rules on the presentation of proposals, which will be required to include most of the information outlined in Section B of this document. Calls for proposal may be general (published in the Official Journal) or restricted, though the circumstances under which restricted calls are made are rigorously controlled.

⁷ Mechanisms and time-cycles will be harmonized within the RTD framework programme and will not be specific to libraries. The call for proposal will be the principal mechanism for soliciting proposals; the call will be published in the Official Journal and will cover all areas of the specific programme 'Telematic systems in areas of general interest'.

An ancillary mechanism which can be used is the advance notice, which is invoked prior to the call for proposal in order to identify those organizations to whom the call, with its complete set of information, should be sent.

- 5.3 **Calls for tender** may be used to solicit proposals for already defined projects or pieces of work, particularly where the Commission provides 100% funding (in some areas of action line 5). Again such calls may be both open (published in the Official Journal) or restricted though restricted calls require proof that there is a finite list of competent organizations for the project.
- 5.4 **Direct agreements** may be made when there is no question of choice as to the appropriate organization(s) for a project, for example the national bibliography projects.
- 5.5 Mechanisms also exist to permit *ad hoc* projects to be considered in order that good ideas are not overlooked. Examples of such are the establishment of a permanent call for proposals (i.e. with no closing date) or a periodic review of proposals received.
- 5.6 Based on experience gained with other CEC cooperative programmes, mechanisms to help organizations identify project partners will be established.

6.0 **TIME-CYCLE FOR PROPOSALS⁸**

Some of the mechanisms outlined above should be applied only once during the duration of the plan. For others, it is suggested that they should be repeated, annually or every two or three years. This repeat-cycle will depend on the action line concerned and on the success of the first application of the mechanism. Current thinking suggests the following cycles for each of the action lines.

- 6.1 **Action line 1:** for part 1, national projects, once only; for part 2, retrospective conversion projects, twice.
- 6.2 **Action line 2:** once only, as networking projects emerge since the intention is to encourage a limited number of very large projects, likely to be very complex to prepare.
- 6.3 **Action line 3:** annually or every 18 months.
- 6.4 **Action line 4:** twice.
- 6.5 **Action line 5:** *ad hoc*.
- 6.6 **Expected time-scales for project proposals.** The deadline for responses to Commission requests for projects is usually relatively short, between 10 and 12 weeks. Expert evaluations of responses and their approval by the appropriate committees normally follows within 4 to 8 weeks of the deadline. Contractual negotiations, including detailed preparation of the technical annex, follow thereafter. Depending on the complexity of the project, this final definition phase may take from a few weeks to several months.

⁸ This section was only intended to be indicative. The actual time-cycle for calls for proposal will be that for the programme 'Telematic systems in areas of general interest. Proposals for projects will be sought according to the priorities to be set within the programme work plan, which may follow the examples provided above.

ADDENDUM

Preamble

As noted in Section C of the guidelines, it is Commission practice to issue more detailed instructions and guidelines in the form of an information pack relevant to each proposal mechanism. Such a pack typically contains an application form outlining the level and range of information required, with instructions on procedural and administrative requirements. Packs, in addition, contain information on the criteria by which the projects being solicited will be evaluated. Guidelines incorporating such specific data can only be issued once the mechanisms have been decided upon and approved. For the present, the following check list, distilled from the general guidelines and the plan itself, is offered as an informal *aide-memoire* to assist those beginning to prepare proposals. It is not exhaustive; nor is it necessarily representative of the packs which will be issued when the formal mechanisms are applied.

The list comprises two parts: the first gives a sample structure as a check that all data have been included; the second takes the form of a series of questions which you may wish to ask yourself to check your project's compliance with the basic objectives of the plan.

Part I

Components of a project proposal

1. Synopsis:
Title of project;
Name and address of applicant library;
Start and probable completion date;
Total cost (Community assistance requested/ own resources).
2. Summary:
Aim of and useful purpose served by the project, innovative value, utility;
Action line to which assigned.
3. Description of working base, current state of the art.
4. Description of project's content, scope and method.
5. Information on implementation:
Organization of project;
List of any project partners with a description of the state of negotiation (joint plans, etc.);
Requirements to be satisfied by potential partners;
Forms of cooperation.
6. Applicant's own experience and qualifications.

7. Financing plan:
Schedule of funds requested (staff and material costs);
Own resources.
8. Information on continuation of the project upon completion of the definition phase.
9. Information on standards.
10. Position of the project within the library infrastructure of the region and in a European context.

Part II

Check-list of questions

1. The project's innovation potential

- Does the project have provision for the use of innovative library activities or applications of modern information technology?
- Does it involve the use of PCs, PC networks, workstations or specialist computer architectures (e.g. databank computers, parallel computers)?
- Does it involve the use of modern telecommunications equipment (e.g. electronic mail, OSI-networking, ISDN, videotex, telefax)?
- Does it involve the use of innovative software systems (e.g. hypermedia, artificial intelligence, object-oriented databanks, neural networks, graphic user interfaces, language processing)?
- Does the project involve the use of modern storage methods (WORM, CD-ROM, video disk, laser card, scanner)?
- Is the project based on existing standards?
- Is it largely vendor-independent?
- Will the project have an effect on further developments in international standards?

2. Utility of the project

- Will the project help to develop innovative information services for libraries?
- Will the project help in any major way to improve or rationalize existing information services for libraries?

- Is there a clearly defined user need for the planned services?
- Will the project contribute to the improvement of services available from libraries as regards the provision of primary information (e.g. knowledge content, facts, data, full text)?
- Will the project help to provide new groups of users with library services?

3. Position of the project within the library infrastructure

- Will the project occupy a logical position in the existing library infrastructure?
- Will the project also be part-funded from the local/regional/national budget?
- Will the project generate impulses for further developments in the existing library infrastructure?
- Is the national contribution to the cost of the project assured?
- Are there prospects for the continued funding of the project (follow-on costs) upon completion of the definition phase?

4. Cooperation component of the project

- Is the participation of international cooperative partners envisaged?
- Will the results of the project be internationally transferable or exploitable abroad?
- How will the project support know-how transfer from abroad and vice versa?
- Is cooperation with major commercial partners envisaged for the project?
- Is cooperation with major universities or research institutions envisaged for the project?
- How are the property rights of the results to be shared amongst the partners in the project?

5. Feasibility of the project

- Is the project based on sufficiently proven and commercially available information technology?
- Are the project's objectives achievable at planned cost levels?
- Will there be a reasonable cost-benefit ratio, in particular if based on the current cost levels of the services envisaged?
- Are qualified in-house teams available to the project partners for implementation and management of the project?
- Is there a prospect of attracting qualified personnel to work on the project at the locations envisaged?

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