



Joint European Research Infrastructure network for Coastal Observatory –  
Novel European eXpertise for coastal observaTories - **JERICO-NEXT**

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<b>Work Package Title</b>	WP 9
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Approvals				
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## 1. Executive Summary

The purpose of this document is to define a consistent set of working procedures, processes and best practice guidelines in order to ensure Quality standards of the Project outcomes. This document represents a general Quality Assurance Plan (QAP) for the JERICO-next project. Its main aims are:

- ◆ To manage the interaction between the beneficiaries during the work execution;
- ◆ To check the progress of the work, on a regular basis;
- ◆ To detail how and when the documentation has to be exchanged by the beneficiaries and with the European Commission;
- ◆ To set editorial standards for Project document contents;
- ◆ To complete existing documents for diffusion to public and other European projects.

This document is split into 4 parts plus annexes:

- ◆ SECTION I details how the JERICO-next project is organised and how the relevant project management bodies will interact during the project;
- ◆ SECTION II explains how the communication within the Project is organised, and details the publication rules;
- ◆ SECTION III deals with the technical outputs of the Project;
- ◆ SECTION IV presents financial statements of the Project

In addition to the present QAP, the Project will be guided by major reference documents which define the objectives, the work program and the operational procedures of the JERICO-NEXT project:

- ◆ the Grant Agreement (GrA) including its Annex I (Description of Work or DoW) and Annex II (General conditions),
- ◆ the Consortium Agreement (CA) signed by all beneficiaries,
- ◆ guidance documents provided by the European Commission,
- ◆ the Plan for dissemination and promotion activities as prepared by WP6 leader and approved by the Coordinator

The identity card of the project is:

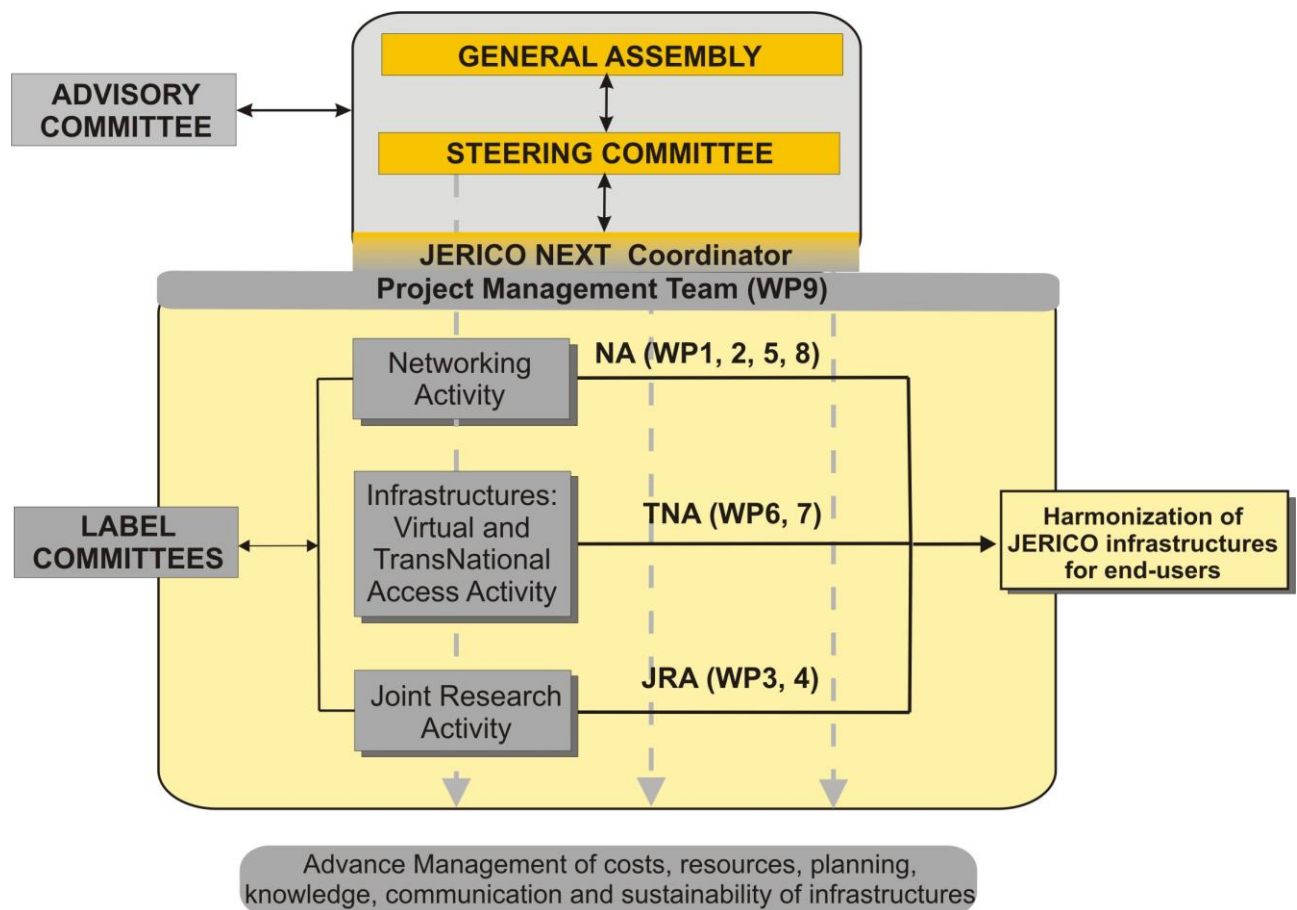
<b>Acronym/ Contract number</b>	JERICO-NEXT/ 262584	
<b>Title of the Project</b>	JOINT EUROPEAN RESEARCH INFRASTRUCTURE NETWORK FOR COASTAL OBSERVATORIES - Novel European eXpertise for coastal observaTories	
<b>Starting date / End date</b>	1 <sup>st</sup> September 2015	31 <sup>st</sup> August 2019
<b>Total Budget Funding</b>	9998876.47 €	
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## 2. PROJECT ORGANIZATION

### ○ General management scheme

The general management scheme is also presented in Chapter B of the DoW.



○ **Project bodies description and responsibilities**

The JERICO-NEXT project is large and requires close cooperation between many institutions and organisations on an international scale. Extensive managerial efforts are required to:

1. Ensure that all beneficiaries perform the duties assigned in the GrA Annex I,
2. Ensure that all Deliverables/Milestones/Results are submitted on time and that each beneficiary has sufficient resources,
3. Detect and assist in problem solving, which may arise due to insufficient communication between beneficiaries or for any other reason.

Therefore, it is essential from a QA point of view that the management, at all levels of the Project (strategic, executive and operational), is well staffed and competent in its duties. The following paragraph describes the responsibilities of each entity.

Face-to-Face (F2F) meetings will be limited and Video Conferences (VC) will be preferably used in order to follow the work in progress. Meetings and workshops will be grouped together whenever possible in order to accelerate communication and avoid unnecessary trips and carbon dioxide emissions.

Concerning the [voting rules](#), as specified in the CA (article 6.2.3 Voting rules and quorum); each Consortium body shall not deliberate and decide validly unless a quorum of its members is present or represented. If the quorum is not reached, and urgent decisions need to be made, the chairperson of the Consortium Body shall organise a virtual voting per e-mail, telefax or per videoconference within 21 days, and will send the corresponding Minutes in accordance with Article 6.2.5 of the CA.

Body	Composition/Responsibilities	Decision approval	Planned meetings
<p><b>Coordinator</b></p>	<p>The JERICO-NEXT Coordinator will assume the responsibility of the technical, financial and administrative management of the Project on a day-to-day basis, according to the contractual guidelines. The Coordinator will be supported by a Project management team (see below) and will also assume the role of chairman of the General Assembly (GA), the sole interface between the EC and the beneficiaries. The Coordinator will administer the EC contribution, regarding its allocation between beneficiaries and activities.</p> <p><b>In particular, the Coordinator shall be responsible for:</b></p> <ul style="list-style-type: none"> <li>• chairing the meetings of the consortium bodies,</li> <li>• monitoring the compliance of the Parties with their obligations,</li> <li>• keeping the address list of members and other contact persons updated and available,</li> <li>• collecting, reviewing to verify consistency, and submitting reports and other deliverables (including financial statements and related certifications) to the European Commission,</li> <li>• transmitting documents and information connected with the Project, including copies of Accession documents and changes of</li> </ul>	<p>By GA</p>	<p>N/A</p>



	<p>contact information to any other Parties concerned,</p> <ul style="list-style-type: none"> <li>• administering the Community financial contribution and fulfilling the financial tasks described in Article 7.3,</li> <li>• providing, upon request, the Parties with official copies or originals of documents, which are in the sole possession of the Coordinator when such copies or originals are necessary for the Parties to present claims,</li> <li>• seeking European Commission approval for changes to Annex 1 of the Grant Agreement,</li> <li>• signing partnership agreement(s) with Associated Partner(s).</li> </ul>		
<b>Body</b>	<b>Composition/ Responsibilities</b>	<b>Decision approval</b>	<b>Planned meetings</b>
<b>General Assembly (GA)</b>	<p>The General Assembly shall consist of one representative of each Party. A list of the General Assembly Members and Associated Partners is mentioned in Attachment 4 of the CA.</p> <p>The GA is responsible for strategic policy and decision making. The GA consists of representatives of all beneficiaries. Their main role is to oversee the strategy of JERICO-NEXT and coordination of the beneficiaries' activities in addition to making high-level decisions in order to facilitate integration of European coastal observatories. Technical re-orientations, validation of Project reviews, IPR and exploitation issues, as well as possible modifications of the consortium composition, are also part of the GA responsibilities. The GA ensures that the adopted strategy is respected in order to reach excellence. In order to facilitate the decision – making process, its Chairperson is the JERICO-NEXT Coordinator who consults members of the GA in-between meetings when needed. The GA will be assisted by permanent Committees (such as Scientific Advisory –SAC) which are represented in its meetings.</p>	Self-decision making organisation	At least once every 18 months
<b>Steering Committee (SC)</b>	<p>The Steering Committee shall monitor the effective and efficient implementation of the Project.</p> <p>The Steering Committee shall consist of the Core Parties as identified in the DoW and the Coordinator. The Steering Committee shall invite one representative of two External Experts to be part of the Steering Committee with in a consultative capacity.</p> <p>The External Experts are the European Environmental Agency (EEA) and the ESF Marine Board. A list of the Steering Committee Members is mentioned in Attachment 5 of the CA.</p>	Report to and be accountable to the GA	Every 9 months





	<p>The Coordinator shall chair all meetings of the Steering Committee, unless decided otherwise. The Steering Committee shall prepare the meetings, propose decisions foreseen in Article 6.3.1.2 of the CA and prepare the agenda of the General Assembly. It will be responsible for the proper execution and implementation of the decisions of the General Assembly.</p> <p>In addition, the Steering Committee shall collect information at least every 6 months on the progress of the Project, examine that information to assess the compliance of the Project with Annex I of the Grant Agreement and, if necessary, propose modifications of Annex I of the Grant Agreement to the General Assembly.</p>		
<b>Scientific and Technical Advisory Committee (STAC)</b>	<p>The Scientific Advisory Committee (SAC) is a consultative body set up for the purpose of maintaining communication and coordinated actions with other marine organisations to ensure cost effective marine research, to avoid duplication of effort, and to prospect fruitful “after JERICO-NEXT” scenarios.</p> <p>Additionally the SAC will be aware of :</p> <ul style="list-style-type: none"> <li>- TNA call evaluation</li> <li>- JRA R &amp; D strategy and results</li> <li>- Evaluation of the intermediates and final reports on the Strategy for the future.</li> </ul> <p>The SAC is composed of representatives of marine research and/or stakeholder organisations (5 people). The members of the SAC will be proposed by the Steering Committee and nominated by the first General Assembly for the duration of this Consortium Agreement. The SAC designates its chairperson from its members. The contact details of members will be listed in Annex II. The Chairperson of the SAC may be invited to attend meetings of the Steering Committee and/or General Assembly in its consultative capacity. SAC meetings will be chiefly organised in connection with the Steering Committee.</p>	Composition approved by GA	STAC meetings will be chiefly organised in connection with the Steering Committee.
<b>Body</b>	<b>Composition/ Responsibilities</b>	<b>Decision approval</b>	<b>Planned meetings</b>
<b>Project Management Team (PMT)</b>	The Project Management Team (PMT) is under the responsibility of the Coordinator.	No	TBD by the coordinator

○ **Work Package management**

The management of the WP is one of the critical aspects of the JERICO-NEXT success.



The JERICO-NEXT Project is divided into 3 activities (Coordination, Support and Joint Research Activities) embedding 8 Work Packages, under a management scheme (WP9).

Whilst the Steering Committee decides on scientific objectives, the Work Package Leaders (WPLs) are involved in defining how to achieve these objectives. They are assisted by a co-leader. Therefore, the Coordinator will rely on them for the technical follow up of the project. WPLs are nominated for each work package (see the description of the different work packages; more details will be given in the Consortium Agreement) and they are committed:

<b>WP</b>	<b>Activity</b>	<b>Leader/CoLeader</b>	<b>WP</b>	<b>Activity</b>	<b>Leader/Coleader</b>
<b>WP9</b>	<b>MGT</b>	<b>IFREMER</b>			
<b>WP1</b>	<b>NA</b>	<b>IRIS/CNRS</b>	<b>WP5</b>	<b>NA</b>	<b>HCMR/EuroGoos</b>
<b>WP2</b>	<b>NA</b>	<b>OGS/HZG</b>	<b>WP6</b>	<b>VA</b>	<b>CEFAS</b>
<b>WP3</b>	<b>JRA</b>	<b>HCMR/IFREMER</b>	<b>WP7</b>	<b>TNA</b>	<b>CNR</b>
<b>WP4</b>	<b>JRA</b>	<b>IFREMER/CNRS</b>	<b>WP8</b>	<b>NA</b>	<b>Blue Lobster/CEFAS</b>

<b>Activity / Work Package / Task</b>	<b>Leader</b>
<b>COORDINATION ACTIVITIES (COORD)</b>	
<b>WP1 – INTEGRATED SCIENCE STRATEGY AND GOVERNANCE FROM LOCAL TO EUROPEAN SCALES</b>	<b>COVARTEC</b>
T1.1 – Literature review	CEFAS
T1.2 – Science strategy	CNRS
T1.3 – Interaction with biology and biogeochemistry infrastructures and consortia	HCMR
T1.4 – Interaction with European and international Ocean Observing networks	SOCIB
T1.5 – Strategy toward sustainability: Economics and Governance	MI
T1.6 – Strategy for the future and the JERICO-NEXT label	IFREMER
<b>WP2 – HARMONIZATION OF TECHNOLOGIES AND METHODOLOGIES – TECHNICAL STRATEGY</b>	<b>OGS</b>
T2.1 – Coordination of network harmonization	OGS
T2.2 – Consolidation of initiated network harmonization actions	HCMR
T2.3 – Harmonizing new network systems	AZTI
T2.4 – Harmonizing new network sensors	HZG
T2.5 – Calibration and assessment	IFREMER
T2.6 – The JERICO-NEXT label technical committee	OGS
<b>WP3 – INNOVATIONS IN TECHNOLOGY AND METHODOLOGY</b>	<b>HCMR</b>
T3.1 – Automated platform for the observation of phytoplankton diversity in relation to ecosystem services	CNRS
T3.2 – Development on current observations from HF radars	CNR
T3.3 – Profiling coastal waters	HCMR
T3.4 – Microbial and molecular sensors	IRIS
T3.5 – Combined sensors for carbonates systems	NIVA
T3.6 – Benthic compartment and process	CNRS
T3.7 – Observating System Experiment / Observing System Simulation Experiment	CMCC



<b>WP4 – VALORISATION THROUGH APPLIED JOINT RESEARCH</b>	<b>IFREMER</b>
T4.1 : JRAP#1 - Biodiversity of plankton, harmful algal blooms and anthropication	SMHI
T4.2 : JRAP#2 – Monitoring changes in macrobenthic biodiversity. Assessing potential environmental controls and functional consequences	CNRS
T4.3 : JRAP#3 – Occurrence of chemical contaminants in Northern coastal waters and biological responses	NIVA
T4.4 : JRAP#4 – 4D characterization of trans-boundary hydrography and transport	AZTI
T4.5 : JRAP#5 – Coastal carbon fluxes and biogeochemical cycling	FMI
T4.6 : JRAP#6 – Operational oceanography and coastal forecasting	SOCIB
<b>WP5 – DATA MANAGEMENT</b>	<b>HCMR</b>
T5.1 – Data policy and distribution	EuroGOOS
T5.2 – Integration of biological data	VLIZ
T5.3 – Platform registration and metadata management system	IFREMER
T5.4 – Interoperable data flow from in situ measurements to archiving in data centers	CNR-ISMAR
T5.5 – Enhancement of Quality Control procedures for sensor based biochemical data	SMHI
T5.6 – Definition of Quality Control procedures for HF Radar data	AZTI
T5.7 – Scientific calibration procedures on gliders data collection	SOCIB
T5.8 – Linking JERICO-NEXT activities to a Virtual Access infrastructure	EuroGOOS
<b>WP6 – VIRTUAL ACCESS</b>	<b>CEFAS</b>
<b>Activity / Work Package / Task</b>	<b>Leader</b>
<b>SUPPORT ACTIVITIES (SUPP)</b>	
<b>WP7 – TRANSNATIONAL ACCESS TO COASTAL OBSERVATORIES</b>	<b>CNR-ISMAR</b>
<b>WP8 – OUTREACH, COMMUNICATION AND ENGAGEMENT</b>	<b>BLIT</b>
T8.1 – Create a channel for 2-way communication for user groups	UOM
T8.2 – Inform and engage stakeholders and public user groups	BLIT
T8.3 – Inform and engage research and policy end-users	CEFAS
T8.4 – Inform and engage industry	SLR
T8.5 – Enhance European human capacity building in operational marine sciences	UOM
T8.6 – Sustain and develop JERICO-NEXT web presence for dissemination of products and knowledge	BLIT
T8.7 – JERICO-NEXT Data Portal	ETT
T8.8 – Implementing Transnational Access to coastal observatories	CNR
T8.9 – Coordinating WP6 Virtual Access	CEFAS

<b>Activity / Work-package / Task</b>	<b>Leader</b>
<b>JOINT RESEARCH ACTIVITIES (JRA)</b>	
<b>WP9 – COORDINATION</b>	<b>IFREMER</b>
T9.1 – Day To Day management	IFREMER
T9.2 – Financial Follow-up	IFREMER
T9.3 – General Assembly And Technical Reporting	IFREMER
T9.4 – Committees	IFREMER
T9.5 – Quality Assurance Plan	IFREMER

More information about the JERICO-NEXT WP's and tasks can be found in the DOA.



- **Meetings**

**Meetings are crucial for the success of the JERICO-NEXT project.** They are necessary to maintain relationship, to promote information exchange and to make agreements and to take major decisions. All beneficiaries have to participate in the GA meetings once every 18months.

The consortium has decided to have face to face (F2F) meetings with the following minimum frequency:

- General Assembly: every 18 months; GA minutes to be published on management website
- Official Steering Committee: every 9 months; minutes on management website
- Work Packages: on request
- Others (related to the governance scheme, Advisory Committees ...): on request

Additional physical meetings may take place as required; the Consortium is also promoting video-conferences.

- Official meetings

- **GA meetings**

One meeting every 18 months. The planned meetings for 2017, 2018 and 2019 are the following:

#	Date/Period	Type of Meeting	Meeting Place/Convenor
1	September 2015	Kick-Off Meeting (KOM)	Majorca (Spain) (IFREMER)
2	March 2017	2nd GA	TBD
	<b>September 2017</b>	<b>Mid Term Review</b>	<b>Paris</b>
3	September 2018	3rd GA	Ireland
4	August 2019	Final GA	France

- **Steering Committee meetings**

One physical meeting every 6 to 9 months at the latest. If necessary, some extra meetings can be organised by video-conference at the request of the coordinator or a WP leader.

- Other meetings

- **Workshops and Technical meetings**

Technical meetings should take place within each WP. The periodicity is not contractually defined, although an average of three meeting per year (physical or by visio-conference) is intended for each WP.

- **Attendance to external events**

The following procedure has to be followed by beneficiaries wishing to represent JERICO-NEXT at external events (conference, exhibition). The beneficiary will normally use its own allowance for travel and registration costs ; Beneficiary sends the following information to the **PMT**, with the lead time identified in the table below, to inform them about:

- Name of the persons joining the event (conference, exhibition, etc.);
- Justification of the attendance;
- Materials to be presented (slides, papers, presentation etc);



- Proposed publication or communication, to be approved by other interested beneficiaries

Type of Meeting/Event	Deadline for the request
Event in Europe	3 weeks before the event
Event outside Europe	6 weeks before the event

Beneficiary can express if he/she wishes the PMT to also attend the event.

▪ Meeting organization

- **Official (GA) and review meetings**

The principle is that these meetings are convened with a long lead time in presence of all participants to allow every interested beneficiary to be present or represented.

Deliverable	Responsible and schedule
<b>Agenda</b>	<ul style="list-style-type: none"> <li>• Produced by the PMT</li> <li>• Distributed one month prior the meeting to the interested beneficiaries</li> <li>• Considered as a final version without comments within one week following its distribution</li> </ul>
<b>Actions list</b>	<p>The actions list is the summary of the main managerial, administrative and technical decisions taken during the meeting:</p> <ul style="list-style-type: none"> <li>• Produced by the PMT</li> <li>• Distributed within two week after the meeting to the interested beneficiaries</li> <li>• Considered as a final version without comments within one week following its distribution</li> </ul>
<b>Minutes</b>	<p>The minutes are a description of the main decisions taken during the meeting:</p> <ul style="list-style-type: none"> <li>• Produced by the PMT</li> <li>• Distributed within one month after the meeting to the interested beneficiaries</li> <li>• Considered as a final version without comments within two weeks following its distribution</li> </ul>

- **Other meetings (Work Packages, tasks, etc...)**

Deliverable	Responsible and schedule
<b>Agenda</b>	<ul style="list-style-type: none"> <li>• Produced by the organizing beneficiary/ WPL</li> <li>• Distributed two weeks prior the meeting to the concerned beneficiaries and to the PMT</li> <li>• Considered as a final version without comments at the latest 2 days prior to the meeting</li> </ul>
<b>Minutes</b>	<ul style="list-style-type: none"> <li>• Produced by the organizing beneficiary/ WPL</li> <li>• Distributed within two weeks after the meeting to the concerned beneficiaries and to the PMT</li> <li>• Considered as a final version without comments within one week following its distribution</li> </ul>

▪ Meeting evaluation

It is requested for the GA meetings to be evaluated.

The main objectives are:

1. to assess how useful they have been,
2. to improve their organisation and management if needed,
3. to assess the understanding of the beneficiaries in the Project progress, their role and the role of the beneficiaries they work with, and to get some feedback on the Project Coordination.



### 3. PROJECT COMMUNICATION

#### ○ Document and image management

##### ▪ Document confidentiality

All JERICO-NEXT documents are considered as “**consortium confidential**”, except when they are explicitly mentioned as public documents (PU) in the DoW.

##### ▪ Document templates

All document templates can be found on the management website

In all document templates, the **Author** is the **lead beneficiary** responsible for the document delivery. The Author is a person only for publications

The following templates are available to produce any document:

For official correspondence:

A official paper letter (Word format): only on request to the PMT

For general purposes:

General Purpose Document (Word format)

Presentation Template (Power Point format)

For meetings:

Meeting Agenda (PDF)

Meeting Minutes (Word format)

General Assembly Evaluation (Word format)

For reporting:

Deliverable Template (Word format)

For financial follow-up: the following templates will be completed by each beneficiary

Costs per Work Package

Use of resources

If needed, this list could be updated during the Project life.

##### ▪ Image library

A special folder is available on site to centralize all images, diagrams or photos useful for the Deliverables and other project reporting. Prior their upload on the FTP site, owners of these images, diagrams or photos are requested to check that they are free of rights and can use by other beneficiaries under no restrictive conditions.

Images, diagrams or photos shall be named according the naming convention.



- Naming conventions and versioning of documents (See annex IV)

Recommendations related to the document editing are:

All documents have to be produced in the Microsoft Word format;  
 Editing language should be set to UK English;  
 The maximum size of the files should not exceed 10 Mbytes without annexes.

Documents	Programmes/format (at least)	Comments
Reports	MS Word for working versions (Word 2010 or 2013) and Acrobat PDF for final versions	To be zipped as needed
Calculation tables	MS Excel (2010, 2013)	
Slides	MS PowerPoint (2010, 2013)	To be converted into .pdf before dissemination within the Consortium
Images	.gif or .jpg	
Compressed files	Quick zip; WinZip; 7 zip	

To facilitate their identification, documents produced during the Project (Deliverable, Milestone, report, presentation, minutes, paper etc ...) shall integrate the naming conventions defined in Annex III.

- **Publications/Dissemination of Project knowledge**

In addition to dissemination activities (ruled by the Plan for dissemination and promotion activities) and to contractual Deliverable, the Project is also expected to generate a substantial amount of publications destined for groups not directly participating in the Project and for the general public.

- Enable free and open access to data.

The objective will be achieved by integrating all relevant coastal data and by facilitating their management through the EMODnet data systems (physical, chemical and biogeochemical) as well as other data management infrastructures such as SeaDataNet, Copernicus (CMEMS), OBIS (biological).

[http://ec.europa.eu/research/participants/data/ref/h2020/grants\\_manual/hi/oa\\_pilot/h2020-hi-oa-pilot-guide\\_en.pdf](http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/hi/oa_pilot/h2020-hi-oa-pilot-guide_en.pdf)

- Types of publication and support

Publications may be wholly or largely based on work done for the Project and/or contain some material based on work done in the Project.

The following presentation modes are included under the term “publication”: an article or an editorial in a refereed or non-refereed international or national journal or conference, invited/keynote presentations at a conference, Ph.D. thesis, an internal report of an institute, M.Sc. thesis, a conference poster not included in proceedings, a stand at a fair, a popular journal, a newspaper interview, a flyer, a newsletter, a web page ...



▪ Publication rules and approval procedure

Normal intellectual ownership and decency rules should be applied. Any proposed publication or communication, regardless of the media (including any plan or model), of the beneficiary's own Knowledge is required to be submitted to the other interested beneficiaries and to the European Commission. To this end, a brief description and the subject of the proposed publication or communication shall be submitted to the other beneficiaries. The beneficiaries shall have the right to object to the publication in accordance with Article II.33.3 of the GrA.

The publication rules can be found on the management website

**The procedure for approval is the following:**

Depending on the nature of the publication and in accordance with the lead time presented in [], the author(s) send(s) to the PMT their proposed publication **3 or 6 weeks** prior to the date of publication or submission. The submission should include the following information:

- Date of publication/ submission
- Date, title and location of the actual diffusion of the publication draft
- Any other relevant information

The author(s) will include appropriate acknowledgement to the Project Consortium and the EC in publication such as:

Supported by the European Commission through the Horizon 2020 Programme for Research and Development, the JERICO-NEXT project addresses the Capacities Programme : "Sustainable development, global change and ecosystems" and regroups 34 organizations from 16 countries with a EC contribution of 6.5 M€.

When referring to contributions from other beneficiaries, the author(s) is(are) free to phrase the acknowledgement, but must include names, institutes and a reference to the JERICO-NEXT Project such as the Internet website address (<http://www.jerico-ri.eu/>).

The author(s) send(s) the publication to all interested beneficiaries for comments or approval.

The author(s) upload(s) the final version for publication.





## 4. TECHNICAL ASPECTS & MID TERM REVIEW PREPARATION

The Project deliverables are split into 2 categories:

**Technical including (contractual/non contractual) Deliverables and Milestones** – see 4.1  
**interim, periodic and final reports** (project reporting within WP) – see 4.2

Technical Deliverables are the outputs of the tasks within the Work Packages, most of them are contractual and will be submitted to the EC (see Chapter B of the DoW). For instance, the nine-month interim report is an additional Deliverable; it aims to facilitate the preparation of EC periodic/final reporting and should present the work on progress, the financial follow-up (see 4.2.3 for the content) and contribute to anticipate eventual difficulties.

### 4.1. Technical Deliverables & Milestones (excluding interim, periodic and final reports)

As per the schedule introduced in 4.1.1, Deliverables and Milestones shall be produced according to the following reporting recommendations:

Quality Assurance of the Deliverables (see 4.1.2)

Approval process and storage (see 4.1.3)

#### 4.1.1. Deliverables and Milestones schedule

Technical Deliverables and Milestones are to be delivered by the Project and assessed at the Due Date (DD) indicated in the DoW. Due Dates (last working day of calendar month) and responsible beneficiaries of Deliverables and Milestones are listed in the tables included in the DoW.

In the present document, chronological lists are recalled in Annex VIII for Deliverables, and Annex IX for Milestones for the first reporting period (M1 to M18).

#### 4.1.2. Quality standard

The primary responsibility of Work Package leaders, Activity coordinators and Project coordinator is to establish and maintain high standards of technical and professional quality with regard to the objectives set for the Project.

All technical Deliverables should be delivered with a summary report according to the following table and associated guidelines.

Deliverables	Technical specifications and Quality standards
Technical Deliverable Report (R)	Shall contain a detailed description of the technical aspects of the Deliverable. The template is available on the management website (category <a href="#">Communication/All templates</a> ). See Annex IV for the naming convention.
Prototypes (P)	Shall be accompanied with: A summary report following the template for technical Deliverables A user manual with schema of the prototype design.
Milestones	Assessment shall be formalised in the Milestone assessment report (following the template for technical Deliverables) providing: The purpose of the Milestone The status The assessment criteria The consequences of the Milestone result
Others (O)	Shall contain a short description of the Deliverable with its main characteristics



The author(s) should comply with general recommendations given for scientific and technical reporting and publishing, and specifically verify that:

- Reference to public sources of information are given;
- Only persons who have significantly contributed to the project and manuscript preparation are listed as co-authors;
- The publication does not contain speculative opinions, although it can use scientific evidence to challenge current concepts or propose new ideas that will encourage progress and discussion;
- It is free of evident commercial or private interest, but must neither obscure proper names when they are required.

In the case of critical time delays, and in collaboration with the WPL, measures should be proposed in an effort to circumvent potential problems. These measures could be:

- Re-organisation and re-deployment of the project time plan. All affected beneficiaries should be informed with regard to the delay. It is of particular importance to attempt to minimise resulting project execution delays especially in the case of tasks comprising the critical path of the project;
- Re-allocation of scientific resources;
- Use of external beneficiaries in an effort to help the delayed working group to deploy its work in time or with an accepted time delay;
- Although not recommended, request of extension of time to the EC. The project Coordinator in this case presents a detailed report with the difficulties and drawbacks that led to violation of the time constraints and the measures taken during the project in order to overcome these problems as well as the beneficiaries responsible for the time delays.

#### 4.1.3. Process for delivery and storage of contractual Deliverables and Milestones

The principle of the process set up to ensure a proper delivery of the technical Deliverables and Milestones at the Due Date is presented hereafter.

The Deliverable/Milestone approval is based on a 5 level process, with dedicated folders in the FTP site for document storage at each step of the process.

Step 1: **the PMT** confirms the Lead beneficiary(ies) about the Delivery Date of the Deliverable/Milestone to be provided;

Step 2: **the lead beneficiary(ies)** prepares the Deliverable/Milestone;

Step 3: **the WPL** approves the Deliverable/Milestone, emails to the Coordinator, the SC and informs of the Deliverable/Milestone availability;

Step 4: **the PMT** updates the Deliverables/Milestones follow-up available on the website;

Step 5: **the PMT** sends electronic copies of contractual Deliverables/Milestones to EC.

During this process, it is mandatory to use the FTP or collaborative site (see the FTP architecture in Annex V) where folders are available for that purpose:

Step 2: in each Activity (NA, TNA and JRA), the lead beneficiary(ies) shall use the relevant WP folder (see Annex III for the naming conventions) :

Step 3: the WP leader is responsible for the storage of the approved version of the Deliverable/Milestone as follows, with the comments page removed and stored

Note that all approved Deliverables will also be stored in the archiving system of IFREMER and accessible on the Jerico-ri website and the participant portal.



Process for the delivery of Contractual Deliverable				
Start date (S) End date (E)				
Step	When	What	Who	How
1	30 days before DD	Information about Deliverable schedule (DD)	PMT	<ul style="list-style-type: none"> <li>Email to the Lead beneficiary(ies) (copy to WPL, AC and substitutes)</li> </ul>
2	S: 30 days before DD E: 15 days before DD	Submission to WP leader	Lead beneficiary(ies) = author	<ul style="list-style-type: none"> <li>Upload first draft on web site, in corresponding draft Deliverable folder of the WP area (</li> <li>Email to the WPL (copy to the concerned AC, to other interfacing WPL, substitutes and to the PMT) that a Deliverable is under validation</li> </ul>
3	S: 15 days before DD E: 5 days before DD	Approved Deliverable sent for storage and publication to the PMT	WPL	<ul style="list-style-type: none"> <li>Upload approved Deliverable with comments on FTP site in corresponding approval folders</li> <li>Email to the Coordinator, the concerned AC and the PMT</li> <li><b>When Public</b>, email to the WP7 leader on the Deliverable availability</li> <li>Inform of the Deliverable availability via the management website.</li> </ul>
4	S: 5 days before DD E: DD	Update the Deliverable Follow-up	PMT	<ul style="list-style-type: none"> <li>Update the Deliverable sheet available in the category <i>Project management/Deliverable follow-up</i></li> <li>Storage on the JERICO-NEXT FTP site corresponding folder (<i>Submitted to EC/Deliverables sent</i>)</li> </ul>
5	DD	EC submission	PMT	<ul style="list-style-type: none"> <li>Electronic copies sent to EC</li> </ul>

Approval processes for contractual Deliverables and Milestones are identical.

## 4.2. Interim, periodic and final reporting

### 4.2.1. Interim, periodic and final reporting schedule

Deliverable		18	24	36	48
MID TERM	Mid term activity report and associated costs		MT		
PERIODIC	Periodic technical report	P		P	P
	<i>Activity report (work progress per WP, Deliverables table...)</i>	P		P	P
	<i>Access Activity report (publicity for access, selection procedure, online questionnaires...)</i>	P		P	P
	<b>Periodic financial report</b>	P		P	P
	<i>Report on the distribution</i>	P		P	P
	<i>Audit Certificates</i>	P		P	P
FINAL	<b>Final technical report</b>				F
	<b>Final financial report</b>				F

I = Interim report, P = Periodic report, F = Final report



#### 4.2.2. Periodic reporting (M18, M36, M48)

##### 4.2.2.1. Periodic reporting Deliverables

Periodic reports have **to be submitted to the EC 60 days after the end of the reporting period**. There are three reporting periods (art. 3 of the GrA):

Period 1: M1-M18 (1/09/2015 to 28/02/2017)

Period 2: M19-M36 (1/03/2017 to 31/08/2018)

Period 3: M37-M48 (1/09/2018 to 31/08/2019)

In order to optimise this short period, the approval process presented in 4.2.2.3 will have to be strictly respected.

##### 4.2.2.2. Periodic reporting content and structure

The layout and content of the reports shall conform to the instructions and guidance notes established by the EC: they are available on the Cordis website

The periodic reports shall include technical and financial aspects according to the following template:

- 1 - Publishable summary
- 2 - Project objectives for the period
- 3 - Work progress and achievements per WP during the period (See below specific instructions for TNA)
- 4 - Deliverables and Milestones tables (See Annexes VII and VIII for the first 18 months)
- 5 - Project management
- 6 - Explanation of the use of the resources
- 7 - Financial statement: Form C and summary financial report filled in on EC FORCE
- 8 - Certificates of financial statements –CFS- (if any)

To specifically report on TNA Activity under the section 3 of the periodic report (Work progress and achievements), the following additional information needs to be provided :

- Description of publicity for access opportunities
- Description of selection procedure
- Overview of TNA activity
- Scientific output of users
- User meetings
- MS Access Database specific to each project with explanatory notes
- Information from users collected through an on-line questionnaire: this will help the EC to evaluate the Research Infrastructures Action, to monitor the individual contracts and to improve the services provided to the scientific community.

##### 4.2.2.3. Approval process for periodic reporting: technical aspects

A specific process has been set up to ensure a proper delivery of periodic reports within 60 days after the Due Date. The document is elaborated through a multi-level process where key contributors report according to the template provided by the EC where technical and financial aspects shall be reviewed (see 4.2.2.2). This process presented hereafter only deals with technical aspects, please refer to 5 for financial aspects.

This process is presented hereafter, with the list of all contributors, the section they deal with and the dedicated folders of the FTP site they have to use for a compatible management of document storage. See the table below for all details and also the Gantt chart provided in Annex V for the first periodic report.



- Step 1:** the PMT confirms to all WPL (copy to the 3 AC) that the first draft of the periodic report, with Section 4 completed (Deliverable/Milestone tables), is available on the FTP site;
- Step 2:** each WPL reports on the progress of her/his WP in Section 3 (Work progress and achievements per WP) and, when completed, informs the PMT about its contribution availability on the FTP site;
- Step 3:** the PMT compiles the contributions from the WPL and uploads the second draft of the periodic report on the FTP site;
- Step 4:** the Coordinator contributes to Section 1 and 5 of the report, including financial aspects resulting from the process run in parallel with administrative representatives (see steps 2 and 4 of the financial reporting process, []);
- Step 5:** based on financial follow-up provided by PMT, the WPL could adjust their contributions;
- Step 6:** the PMT informs of the periodic report availability via the management website, stores the report in read only version on the FTP site and transmits it to the EC.

Approval process for technical reports					
		Start date (S)	End date (E)		
Step	When	What	Who		
1	30 days before DD	First draft of the periodic report (with Section 4 completed)	PMT to all WPL	◆	
2	(S): 30 days before DD (E): 15 days before DD	Description of the work progress in Section 3	WPL	◆	
3	(S): 15 days before DD (E): 8 days before DD	1) Compilation in Section 3 of all WPL contributions 2) Second draft of the periodic report	PMT	◆	
4	(S): DD (E): 60 days after DD	New draft of the periodic report with contributions in Sections 1 and 5	Coordinator		
5	(S): 15 days after DD (E): 30 days after DD	Inclusion of financial aspects in the report	WPL		
6	(S): 30 days after DD (E): 45 days after DD	New draft of the periodic report with additional contributions in Section 5	PMT	◆	
7	(S): 45 days after DD (E): 60 days after DD	Final validation by the SC	SC		
8	60 days after DD	Final approved version submitted to EC	PMT		

#### 4.2.2.4. Mid term review preparatory documents

A mid term review of the Project is planned in the GrA (Art. 7).  
It will be based on the M18 periodic report updated by the M24 interim report.



#### 4.2.3. Mid term reporting (M24)

The process is similar to the technical process set up for periodic reports (see 4.2.2.3) except that:

Financial aspects included in the report at step n°5 are based on estimated figures provided by the administrative representatives of all beneficiaries.

#### 4.2.4. Final reporting (M48)

##### **4.2.4.1. Final reporting Deliverable**

In addition to the last periodic report at M48, the final reports presented in 4.2.4.2 shall be submitted after the end of the project.

The final report has **to be submitted to the EC 60 days after the end of the project**. In order to optimise this short period, a specific approval procedure will have to be strictly respected. This procedure will be pragmatically set up after the approval by the EC of the first periodic report.

##### **4.2.4.2. Final reporting content and structure**

The final report (M48) consists of the following additional documents:

**Final publishable summary report:** covering all the works, objectives, results and conclusions;

**Report on societal implications** covering the wider societal implications of the Project, in the form of a questionnaire, including where applicable gender equality actions, ethical issues, efforts to involve other actors and to spread awareness.

#### 4.2.5. Transmission of periodic and final reporting Deliverables

The Coordinator on behalf of the Consortium shall transmit the above documents to the EC by:

Electronic means (pdf files) (Article II.4.5 of the GrA),

The originals and the audit certificates by express mail.

In addition, Forms C must be signed by the authorised person(s) within the beneficiary's organisations and the certificates of financial statements and on the methodology must be signed by an authorised person of auditing entities, and the originals shall be sent to the EC.

Each periodic report shall be in the form of **ONE** single report in electronic format, preferably in PDF format and include, where applicable, a copy (properly scanned) of the signed pages, the originals being sent in parallel by post. The signed pages concerned are the Forms C, the self declaration of the Coordinator and the audit certificates or certificates on the methodology.

The reports submitted to the EC, in particular their publishable parts, shall be of a suitable quality to enable direct publication without any additional editing. By submitting the publishable reports to the EC, the PMT will also verify that they include no confidential material (Article II.4.7 of the GrA).



## 5. FINANCIAL ASPECTS

### ○ Pre-financing, interim and final payment of the balance

The pre-financing related to MGT, NA and JRA has been paid within 45 days after receipt of the funds

There is only one pre-financing which has been paid within 45 days after the receipt of the funds.

Payments are delivered at the end **of each reporting period and after evaluation and approval of the project reports and Deliverables** (corresponding payment disbursed by the EC **within 105 days** of the receipt of project reports and Deliverables).

Interim payments are delivered at the end of each reporting period, after evaluation and approval of the project reports, within 90 days from the reception of periodic report.

The coordinator must distribute the payments between the beneficiaries without unjustified delay.

Corresponding interim payments are based on financial statements and calculated on the basis of the accepted eligible costs and the corresponding reimbursement rates (Art 21.3 of the AGA).

The total amount of interim payments plus the pre-financing is limited to 90 % of the EC contribution.

The payment of the balance is delivered after the final reporting (within 90 days from reception of final reports) and the EC releases the 5 % contribution to the Guarantee Fund.

### ○ Cost monitoring

#### ▪ Eligibility criteria

The eligible costs are defined in Articles 6.1 and 6.2 of the AGA (Annotated Grant Agreement).

For actual costs:

- they must be actually incurred by the beneficiary;
- they must be incurred in the period set out in Article 3, with the exception of costs relating to the submission of the periodic report for the last reporting period and the final report (see Article 20);
- they must be indicated in the estimated budget set out in Annex 2;
- they must be incurred in connection with the action as described in Annex 1 and necessary for its implementation;
- they must be identifiable and verifiable, in particular recorded in the beneficiary's accounts in accordance with the accounting standards applicable in the country where the beneficiary is established and with the beneficiary's usual cost accounting practices;
- they must comply with the applicable national law on taxes, labour and social security, and
- they must be reasonable, justified and must comply with the principle of sound financial management, in particular regarding economy and efficiency

① **New:** non-deductible VAT paid is also eligible

Actual : real costs,  
Incurred by the beneficiary,  
Incurred during the duration of the Project,  
Determined according to the usual accounting of the beneficiary,  
Use for the sole purpose of achieving the objectives of the Project,  
Recorded in the accounts of the beneficiary,  
Indicated in the estimated budget appearing in the DoW.



In addition, for eligible access costs in TNA:

Access costs to the equipment are based on estimated unit costs  
the access costs calculation will be adjusted before the end of the last period of the Project. The calculation shall be based on the methodology used during the negotiation period.

▪ Bases of financial follow-up

All financial statement forms and documents shall respect the guidelines provided by the EC.

The Annotated Grant Agreement is available on the following address:

[http://ec.europa.eu/research/participants/data/ref/h2020/grants\\_manual/amqa/h2020-amqa\\_en.pdf](http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/amqa/h2020-amqa_en.pdf)

**Each beneficiary remains responsible to the EC for its costs claimed even after payment by the EC and even after submission of a Certificate of Financial Statements (CFS).**

Original support documents must be kept for 5 years after the end of the Project. Beneficiaries must keep all :

- Invoices (hotel, restaurant, purchases, etc.),
- Tickets (train, flight, metro, bus, etc.),
- List of presence signed by the participants to a meeting + programme,
- Other costs justifications.

▪ Financial reporting (M18, M24, M36, M48)

All financial reports of the project (see the table of section 4.2.1) require the beneficiaries to complete the financial templates provided in Annex IV

The financial reporting is based on the following process :

Step 1: **the PMT** informs all beneficiaries about financial templates availability on the FTP site and the date they have to be provided;

Step 2: **each beneficiary** shall provide **from Due Date** the PMT with information relative to costs incurred during the reporting period using the dedicated templates:

- Costs per category/beneficiary/WP (Template n°1 in Annex IV) → similar to Form C;
- Use of resources → requested in the EC Reporting Template;
- Number of hours and of person.month (effort progress) per Deliverable and WP (Template n°1 in Annex IV).

Step 3: **the PMT** updates the section 6 (Explanation of the use of resources) of the periodic report;

Step 4: **the PMT** will provide/publish **2 weeks later** a financial follow-up detailing:

- Total costs per WP and category (Template 4 in Annex VI),
- Effort progress (person.month) during the Project.





Approval process for financial reports					
		Start date (S)	End date (E)		
Step	When	What	Who	How	
1	30 days before DD	Financial templates (n°1, 3 and 4) availability	PMT	Upload on the FTP site the financial templates, folders: Email to all administrative representatives (copy to WPL)	
2	(S): DD (E): 15 days after DD	Template submission to PMT	All Beneficiaries	Email to PMT	
3	(S): 15 days after DD (E): 30 days after DD	Update of section 6 of the interim/periodic report	PMT	Using templates n°2 provided by all beneficiaries	
4	(S): 15 days after DD (E): 30 days after DD	Submission of consolidated tables to AC and WPL	PMT	Email to the WP leaders and AC. Tables stored in folder:	

▪ Financial statements (M18, M36, M48)

In addition to the financial follow-up described above (see [1](#)), periodic reporting to EC (M18, M36 and M48) requires the delivery of financial statements at the end of the period, using the:

- Signed Form C<sup>1</sup> (Financial Statements) using the web based tool FORCE (TBC);
- Signed Form D if any (CFS).

These statements give the additional steps presented here after:

Step 5: **all beneficiaries** provide the forms C via the web-based tool FORCE and the certificates to PMT;

Step 6: the **PMT** updates Sections 7 and 8 of the periodic report.

Approval process for financial reports					
		Start date (S)	End date (E)		
Step	When	What	Who	How	
5	(S): 15 days after DD (E): 30 days after DD	1) Financial Statement: Form C and Summary financial report provided via the web  2) Original Form C and CFS provided to PMT	All beneficiaries	<ul style="list-style-type: none"> <li>◆ Inform the PMT that the Form C is completed on-line</li> <li>◆ Send the original versions of the Form C and CFS (if applicable) to PMT</li> </ul>	

1

There is only one way to submit Forms C: on the Web based application FORCE. Beneficiary has only access to his own Form C. Key actions to be performed are:

- ◆ For the beneficiaries: electronic submission of Forms C to the PMT,
- ◆ For the Coordinator: electronic submission of Forms C to the EC
- ◆ Eventual correction of Forms C when refusal by the PMT or the EC.



Approval process for financial reports					
		Start date (S)	End date (E)		
Step	When	What	Who	How	
6	(S): 30 days after DD (E): 45 days after DD	Update of the sections 7 and 8 of the periodic reports	PMT	♦ Electronic copies of all Forms C and certificates if needed	

○ **Certificate of Financial Statements (CFS)**

Certificate of Financial Statements (CFS) are forms filled in by an external auditor selected by the beneficiary. They contain a number of questions (controls) which the auditor is asked to answer (check) in verifying the beneficiary accounting and control system or document in relation to the execution of the project.

CFS are only required when the cumulated Community financial contribution (not costs!) requested exceeds 325,000€,

CFS must certify all eligible costs of the period,

CFS must be submitted following the templates provided in Annex IV of the GA

CFS are prepared and certified by independent auditors.



## Annexes



## Annex I – Contact details for Project Management Team (PMT) and Work Package leaders (WPL)

The persons in the above governing and operational bodies of the JERICO-NEXT project are listed below (**PC** : Primary Contact **S** : Substitute).

### I.1. Project Management Team (PMT) and Scientific coordination team (SCT)

JERICO-NEXT Project Management Team						
Beneficiary	Person			Activity Coordinators	Roles	
	First Name LASTNAME	Email Address	Phone Number			
IFREMER	Patrick FARCY	Patrick.farcy@ifremer.fr	+ 33 2 98 22 44 08		WP9	<p><b>PC</b></p> <ul style="list-style-type: none"> <li>Communication</li> <li>Indicators</li> <li>Amendments to GrA, CA</li> <li>Meeting coordination</li> </ul>
	Ingrid PULLAT	ingrid.puillat@ifremer.fr	+ 33 2 29 00 85 09			<p><b>S</b></p> <ul style="list-style-type: none"> <li>Second in command</li> <li>Management website</li> </ul>
	Sylvie PICHEREAU	sylvie.pichereau@ifremer.fr	+ 33 2 98 22 42 33			<ul style="list-style-type: none"> <li>Project manager</li> </ul>
	Anne SCHMIDT	anne.schmidt@ifremer.fr	+ 33 2 98 22 42 33			<ul style="list-style-type: none"> <li>Deputy project manager</li> </ul>
	Elodie JOUSSET	Elodie.jousset@ifremer.fr	+33 1 46 48 21 61			<ul style="list-style-type: none"> <li>Contractuel contact</li> <li>Consurtium agreement</li> </ul>

Scientific coordination team						
	Person				Beneficiary	
	First Name LASTNAME	Email Address	Phone Number			
	Dominique DURAND	dominique.durand@covartec.eu	+ 47 93 22 97 92		WP1	NIVA
	Ingrid PULLAT	ingrid.puillat@ifremer.fr	+ 33 2 29 00 85 09			IFREMER
	Antoine GREMARE	a.gremare@epoc.u-bordeaux1.fr	+ 33 2 98 29 23 17			CNRS/INSU



## I.2. STEERING COMMITTEE (SC)

Steering Committee- Primary contacts and substitutes (twins)						
Beneficiary	Person				Work Package	Roles
	First Name LASTNAME	Email Address	Phone Numbers			
IFREMER	Patrick FARCY	Patrick.farcy@ifremer.fr	+ 33 2 98 22 44 08		WP9	<u>WPL</u>
	Ingrid PULLAT	ingrid.puillat@ifremer.fr	+ 33 2 29 00 85 09		WP4	<u>WPL</u>
	Sylvie PICHEREAU	<a href="mailto:sylvie.pichereau@ifremer.fr">sylvie.pichereau@ifremer.fr</a>	+ 33 2 98 22 42 33			
	Laurent DELAUNEY	laurent.delauney@ifremer.fr	+ 33 2 98 22 46 36		WP3	<u>WPcL</u>
HZG	Wilhelm PETERSEN	wilhelm.petersen@hzg.de	+49 4152 87 2358		WP2	<u>WPcL</u>
BLIT	Simon KEEBLE	simon@bluelobster.co.uk	+44 7454 221 202		WP8	<u>WPL</u>
	Kathryn Keeble	kathryn@bluelobster.co.uk	+447850361333			<u>S</u>
OGS	Rajesh NAIR	rnair@ogs.trieste.it	+39 40 21 40323		WP2	<u>WPL</u>
CEFAS	Michelle DEVLIN	Michelle.devlin@cefas.co.uk	+44 1502 524357		WP6	<u>WPL</u>
	Kate Collingridge	kate.collingridge@cefas.co.uk	+44 1502 521348			<u>S</u>
COVARTEC	Dominique DURAND	dominique.durand@covartec.eu	+47 55 54 39 32		WP1	<u>WPL</u>
CNRS	Antoine GREMARE	a.gremare@epoc.u-bordeaux1.fr	+33 (0)5 40 00 33 55		WP4	<u>WPcL</u>
	Luis Felipe ARTIGAS	felipe.artigas@univ-littoral.fr				<u>S</u>
CNR	Stefania SPARNOCCHIA	stefania.sparnocchia@ismar.cnr.it	+39 040 305312 ext 504		WP7	<u>WPL</u>
	Annalisa Griffa	annalisa.griffa@sp.ismar.cnr.it				<u>S</u>
HCMR	George PETIHAKIS	gpetihakis@hcmr.gr	+30 2810 337755		WP3	<u>WPL</u>
	Leonidas PERIVOLIOTIS	lperiv@hcmr.gr	+302291076400		WP5	<u>WPL</u>
EuroGOOS	Patrick GORRINGE	<a href="mailto:patrick.gorringe@eurogoos.eu">patrick.gorringe@eurogoos.eu</a>	+46 11 49 58047		WP5	<u>WPcL</u>



## Annex II - Contact details Scientific and Technical Advisory Committee (STAC) and User Engagement Panel

### II.1. Scientific Advisory Committee (STAC)

Organization	Person		Role
	First Name LASTNAME	Email Address	
University of Washington, USA	Janet Newton	newton@apl.washington.edu	Expert
Natural Environment Research Council	Richard Lampitt	r.lampitt@noc.ac.uk	FIXO3
Royal Netherlands Institute for Sea Research	Peter Herman	Peter.Herman@nioz.nl	Chair
National Institute for Geophysics and Volcanology	Laura Beranzoli	laura.beranzoli@ingv.it	EMSO
University of Porto	Isabel Sousa Pinto	ispinto@ciimar.up.pt	EMBOS
Oceanic Platform of the Canary Islands and representative of NEXOS	Eric Delory	eric.delory@plocan.eu	NEXOS
IMOS, University of Tasmania Australia	Roger Proctor	Roger.Proctor@utas.edu.au	Expert
Spanish Institute of Oceanography	Alicia Lavin Montero	alicia.lavin@st.ieo.es	Expert

### II.2. User Engagement Panel (TBD)

Organization	Person		Role
	Name	Email Address	
Scitus Management Ltd	<b>McKenzie-Midlane P.</b>	inbox@scitusmanagement.com	UK Expert
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Fugro OCEANOR AS	<b>Sveggen O.</b>	o.sveggen@fugro.com	Norway Expert
Vlaamse Overheid, MDK, aKust	<b>Vercruysse J.</b>	johan.vercruysse@mow.vlaanderen.be	Belgium Expert
Technical University of Catalonia, (UPC)	<b>André M.</b>	michel.andre@upc.edu	Spain Expert
ECOLAGUNA	<b>Rusanovschi S.</b>	info@ecolaguna.de	Germany Expert
Marine Scotland	<b>Turrell B.</b>	bill.turrell@gov.scot	UK Expert
Bangor University	<b>Mills D.</b>	d.mills@bangor.ac.uk	UK Expert
OSPAR	<b>Foden J.</b>	Jo.Foden@ospar.org	UK Expert



## Annex III - Templates for financial follow-up

### . Use of resources - Template example (final version to be provider by coordination for the st reporting)

JERICO Project 262584 : Project costs per WP and beneficiary during Period 1 (01 May 2011 - 31 October 2012)																										
Beneficiary (short name) :																										
Indirect Cost Method (1) :		Indirect Cost rate :				Conversion rate from hours to person month (2) :																				
		RTD						COORDINATION												SUPPORT		MANAGEMENT		TOTAL		
		WP9		WP10		WP1		WP2		WP3		WP4		WP5		WP6		WP7	WP8	WP11						
		hrs	pm	Cost	hrs	pm	Cost	hrs	pm	Cost	hrs	pm	Cost	hrs	pm	Cost	hrs	pm	Cost	hrs	pm	Cost	hrs	pm	Cost	
<b>Personnel costs</b> <i>Please split one line per person</i>	Name employee (MF) :	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
	Name employee (MF) :	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
	Name employee (MF) :	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
	Name employee (MF) :	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
	Name employee (MF) :	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
	Name employee (MF) :	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
	Name employee (MF) :	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
	Name employee (MF) :	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
	Name employee (MF) :	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
	Name employee (MF) :	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
<b>TOTAL Personnel costs per WP</b>				0,00			0,00			0,00			0,00			0,00			0,00			0,00			0,00	
<b>Total Personnel costs per Activity</b>		0,00						0,00														0,00		0,00		
<b>Subcontracting</b> <i>Please split one line per subcontractor</i>	Subcontractor and description purpose	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost		
	subcontracting 1																									
	subcontracting 2																									
	subcontracting 3																									
	subcontracting 4																									
<b>TOTAL Subcontracting costs per WP</b>				0,00			0,00			0,00			0,00			0,00			0,00			0,00			0,00	
<b>Total Subcontracting costs per Activity</b>		0,00						0,00														0,00		0,00		
<b>Other direct costs</b> <i>Please split one line per cost</i>	Durable equipment (depreciation of durable equipment)	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost		
	Equipment 1 (type of equipment, depreciation of equipment xxxxxx for experiment xxx)																									
	Equipment 2																									
	Equipment 3																									
	<b>TOTAL Durable equipment per WP</b>				0,00			0,00			0,00			0,00			0,00			0,00			0,00			0,00
	Travel and subsistence	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost		
	Travel and subsistence 1																									
	Travel and subsistence 2																									
	Travel and subsistence 3																									
	Travel and subsistence 4																									
Travel and subsistence 5																										
<b>TOTAL Travel and subsistence per WP</b>				0,00			0,00			0,00			0,00			0,00			0,00			0,00			0,00	
Consumables and other direct costs	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost		
Consumables, supplies and others 1																										
Consumables, supplies and others 2																										
Consumables, supplies and others 3																										
<b>TOTAL Consumables, supplies, other direct costs per WP</b>				0,00			0,00			0,00			0,00			0,00			0,00			0,00			0,00	
<b>TOTAL Other direct costs per WP</b>				0,00			0,00			0,00			0,00			0,00			0,00			0,00			0,00	
<b>Total Other direct costs per activity</b>		0,00						0,00														0,00		0,00		
<b>INDIRECT COSTS</b> <i>Please use your proper calculation</i>	<b>TOTAL indirect costs per WP</b>			0,00			0,00			0,00			0,00			0,00			0,00			0,00			0,00	
	<b>Total indirect costs per activity</b>	0,00						0,00														0,00		0,00		
<b>ACCESS COSTS</b>	<b>SERVICE ACCESS COSTS (SA)</b>	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
	<b>TRANSNATIONAL ACCESS COSTS (TA)</b>	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
<b>TOTAL COSTS PER ACTIVITY</b>		0,00						0,00														0,00		0,00		
<b>MAXIMUM EC Contribution</b>		0,00						0,00														0,00		0,00		
<b>REQUESTED EC Contribution</b>		0,00																								

## Annex IV – Naming conventions

### Deliverables, Milestones and Internal reports

Document status	File name
Draft	JERICO-NEXT-WP<wp number>-<Del. or Mil. or Rep. Number>-<DDMMYY>-V<V_Num>
Final	JERICO-NEXT-WP<wp number>-<Del. or Mil. or Rep. Number>-<Resp. beneficiary>

e.g : [JERICO-NEXT-WP9-D9.2-03/05/2016-V1.1](#)

### Conference and journal papers

Document status	File name
Draft	JERICO-NEXT-<Paper title>-<Submitted Where and When>-<DDMMYY>-V<V_Num>
Final	JERICO-NEXT-<Paper title>-<Submitted Where and When>-<DDMMYY>

e.g : [JERICO-NEXT-This is the title of the journal paper-Bergen120916-V1](#)

### Meeting agenda, minutes and actions list

Document status	File name
Draft/Final	JERICO-NEXT-WP<wp number>-<Type>-<Date of the meeting>- V<V_Num>

e.g : [JERICO-NEXT-WP9-SC-271016-V1](#)

### For periodic and final reports: M18, M36, M48

Document status	File name
Periodic	JERICO-NEXT-WP0<WPnumber>-PERIODIC-< targeted period of the reporting period for the EC sending (M18, M36, M48)> -<DDMMYY>-V<V_Num>
Final	JERICO-WP0-<number of the deliverable>-PERIODIC-< targeted period of the reporting period for the EC sending (M18, M36, M48)> -<DDMMYY>

e.g.: [JERICO-NEXT-WP11-PERIODIC-M18-290117-V1](#)





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- [D6.2 Community Hub](#)
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- [D6.4 Jerico Web-Based Interactive Tools](#)
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- [D9.4 WP9 Second Annual Scientific Report](#)
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  - [NIVA](#)
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## Annex VI – Acronym Glossary

<b>AP</b>	Associated Partner(s)
<b>CA</b>	Consortium Agreement
<b>CFS</b>	Certificate of Financial Statements
<b>CO</b>	Confidential delivery, only for members of the Consortium (incl. the European Commission services)
<b>DD</b>	Due Date (or Delivery Date)
<b>DoW</b>	Description of Work = Annex I of the Grant Agreement
<b>EC</b>	European Commission
<b>ESF</b>	European Science Foundation
<b>F2F</b>	Face-to-Face
<b>FAQ</b>	Frequently Asked Questions
<b>GA</b>	General Assembly
<b>GrA</b>	Grant Agreement
<b>JRA</b>	Joint Research Activity
<b>KOM</b>	Kick-Off Meeting
<b>NA</b>	Networking Activity
<b>O</b>	Other
<b>P</b>	Prototype
<b>PC</b>	Primary Contact
<b>PM</b>	Person-month
<b>PMT</b>	Project Management Team
<b>PP</b>	Delivery restricted to other programme participants (including the European Commission services)
<b>PU</b>	Public
<b>QAP</b>	Quality Assurance Plan
<b>QI</b>	Quality Indicator(s)
<b>R</b>	Report
<b>RE</b>	Delivery restricted to a group specified by the consortium (incl. the European Commission services)
<b>S</b>	Substitute
<b>SA/VA</b>	Service Access/Virtual Access
<b>SC</b>	Steering committee
<b>SCT</b>	Scientific Coordination Team
<b>TL</b>	Task Leader
<b>TNA/TA</b>	Trans National Access
<b>VC</b>	Video-conference
<b>WP</b>	Work Package(s)
<b>WPL</b>	Work Package leader(s)

