idSpace Consortium Handbook and Quality Standards Plan

Version 1.0

30 September 2008
Centre for Learning Sciences and Technologies (CELSTEC)
Onderwijstechnologisch Expertisecentrum
Open University of the Netherlands

idSpace Consortium Handbook and Quality Standards Plan

Version 1.0

Deliverables 7.1 & 7.2
## Amendment History

<table>
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<tr>
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</tr>
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<tbody>
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</tr>
</tbody>
</table>
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1 Introduction

This Handbook contains information that concerns the proper day-to-day running of the idSpace project, and to promote quality assurance.

Quality assurance (QA) in idSpace is not a one-time activity, but is fully integrated into the project structure and procedures. The following QA aspects are covered in this Handbook:

- Responsibilities of all those involved in project activities
- Regular internal and external monitoring and reporting procedures
- The definition of a QA protocol for scientific, technology and valorisation outputs
- Deliverable review and submission procedures
- External project review procedure
- Overall project evaluation
- Software-related procedures
- Risk assessment

Where relevant, this Handbook makes reference to other project documents such as the Description of Work (DoW) or the Consortium Agreement (CA). When ambiguity between these documents arises, the Handbook takes a subordinate role. Precedence is given to the documents in the following order:

1. Grant Agreement and Annexes, including the DoW (highest priority)
2. Commission rules, e.g. as contained in manuals
3. Consortium Board decisions
4. Consortium Agreement
5. Handbook (lowest priority)

Questions and suggestions for improvement of the Handbook can be sent to: wolfgang.greller@ou.nl or peter.sloep@ou.nl
If need be, the Consortium Board can decide on removing, adding or altering the Handbook.
2 Project Governance

2.1 Consortium management structure

The idSpace project management structure is as follows (DoW B2.1):

All major project roles are detailed below.

2.2 Roles and responsibilities of project bodies

2.2.1 Project Co-ordinator

The Project Co-ordinator is the key person for bringing the project objectives to a successful completion. He is also responsible for the assessment of potential risks at all times during the project. In his role as Chair of the Consortium Board and the Executive Committee he is responsible for the day-to-day management of the project, provides leadership, and actively promotes the image and reputation of idSpace. He is supported by the idSpace Secretariat in the day-to-day coordination work and for all administrative tasks.

Additionally, the Project Co-ordinator acts as the intermediary to the European Commission and as the single point of contact for the Consortium.

Tasks and responsibilities:

1 Wherever appropriate, the reader should replace the female forms of the male personal pronouns that have been used throughout the document.
The Project Co-ordinator is responsible for the following:

- Overall management of the project supported by the Secretariat
- Chairing the Executive Committee and the Consortium Board
- Preparing meetings and decisions of the Consortium Board and the Executive Committee
- Collecting and preparing, with support from the Executive Committee, statements, including financial audit certificates, from the partners for transmission to the European Commission
- Prompt delivery of all output identified as deliverable items in the contract or requested by the European Commission for reviews and audits, including the results of the financial audits prepared by independent auditors
- Monitoring the effectiveness of the quality assurance procedures and criteria in producing and assessing deliverables and annual implementation plans.
- Advise the Executive Committee on any required additional quality assurance procedures and criteria during project execution.

In addition, the Co-ordinator is authorised:

- In case there exist serious concerns regarding the budgetary situation of a partner, to require a letter of comfort to prove that the partner is able to fulfil their financial obligations with regard to the contract and the Consortium Agreement. Until this is provided, the Co-ordinator is entitled to refuse the disbursement of the financial contributions of the European Commission to this Party (CA 7.3).
- To withhold any payment if a partner is late in submitting or refuses to provide deliverables as defined in the Description of Work and/or Consortium Agreement.

Contact details

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2.2.2 Consortium Board

The Consortium Board (CB) is the ultimate decision-making body of the Consortium. The representatives to the Consortium Board are of senior management level with the authority to commit their organisation to the decisions of the Consortium Board.

The Consortium Board is responsible for:

- Overall project progress, quality, and financial monitoring, including the approval of the Periodic Reports (see 3.3.4) to the Commission.
- Project strategy formulation and review, including the compilation and maintenance of a Consortium Agreement.
- Managing the Consortium composition.
- The resolution of difficulties and disputes.
Each partner's representative on the Consortium Board will be responsible for the timely execution of *idSpace* activities within their own institution. In this role, they will establish the policy of their organisation for issues decided by the Consortium Board or the Executive Committee, and identify the required local project support person who will take charge of the administrative and financial issues. If required, members of the CB can call for extra meetings to be convened.

**Tasks and responsibilities:**

The Consortium Board takes decisions on matters relating to:
- The overall direction and steering of the project, supported by progress reports received from the Executive Committee.
- The final approval of the Periodic Report (D7.3) and Final Report (D7.4) prior to their submission to the European Commission.
- All budget-related matters, including approval of the balances for the past (financial) year.
- The structure and restructuring of the work packages.
- Standards including, but not limited to: project standards and quality assurance; the *idSpace* deliverable acceptance protocol; the technical standards and architecture; the scientific standards; and the valorisation approach.
- The appointment of members to the Executive Committee.
- The acceptance of new parties as well as the exclusion of parties.
- The alteration of the Consortium Agreement.
- Partner performance related to the project tasks or budget
- The resolution of difficulties and disputes.
- The premature completion/termination of the Project.

**Member contact details**

<table>
<thead>
<tr>
<th>Organization</th>
<th>Name</th>
<th>Email</th>
<th>Phone</th>
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<tbody>
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</tbody>
</table>
### 2.2.3 Executive Committee

The Executive Committee is responsible for the execution of the project. It reports and is accountable to the Consortium Board. This involves assuming overall responsibility for proper administration of the project and for implementation of the provisions contained in the Consortium Agreement.

The Executive Committee is the main interface between Work Package Leaders. It takes administrative, financial, and logistical decisions for operational activities that surpass the level of individual work packages, in accordance with strategic decisions taken by the Consortium Board (CB).

**Responsibilities of the Executive Committee include:**

- Monitoring of progress through the administration of milestones and deadlines.
- Supporting the CB and the EU Project Officer in monitoring progress through the compilation of regular progress reports, based on input received from its members, the Work Package Leaders.
- Supporting the CB in progress and financial reporting to the European Commission through the compilation of Periodic Reports on the basis of input received from its members Work Package Leaders and the Consortium Board.
- Supporting the CB in preparing any adjustment, if required, to the work plan on the basis of input from its members, the Work Package Leaders, and the Board itself. Supporting the Co-ordinator in fulfilling obligations towards the European Commission and the CB.

**Tasks and responsibilities**

The Executive Committee implements directions given by the Consortium Board and assumes overall responsibility towards the CB for liaising between the parties, as well as for analysing and approving the results generated by the Work Packages. The Executive Committee shall be specifically responsible for:

- Taking decisions that affect the execution of the directions given by the CB.
- Monitoring that all work meets functional requirements.
- Proposing changes in membership of the EC to the Consortium Board.
- Proposing to the parties (other than a Defaulting Party) to serve notices on a Defaulting Party and to assign the Defaulting Party's tasks to specific entities.
- Set standards for scientific publications and technology output.
- Review project deliverables as measured against the agreed quality standards.
- Advise on structuring relations with the wider professional community in the various sectors.
Member contact details

<table>
<thead>
<tr>
<th>WP</th>
<th>Organization</th>
<th>Name</th>
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</tbody>
</table>

2.2.4 idSpace Secretariat

The Secretariat provides administrative, financial, legal and logistic support to the Consortium Board; to the Executive Committee; to the Project Co-ordinator in his role as intermediary to the Commission with communication and reporting activities; and to the Work Package Leaders where activities surpass that of individual Work Packages. The Secretariat carries out its activities as part of WP7.

The Secretariat comprises a General Manager for interfacing with the Work Package Leaders, a Financial Administrator, secretarial and legal support. The General Manager assists the Project Co-ordinator in all of his tasks and is the main day-to-day contact person for the European Commission for administrative, financial, legal and logistical issues that are standard procedures.

Tasks and responsibilities

- Compile a Project Handbook detailing: project structure, policies and procedures for reporting and submitting deliverables; quality assurance standards and procedures.
- Liaise with the Work Package Leaders to receive periodic (activity and management) and final reports.
- Liaise with Local Administrators to receive periodic financial and resource reporting.
- Prepare reports and submissions to the European Commission based on the input of Work Package Leaders.
- Coordinate drafting the Periodic Report for approval by the Executive Committee, and for final ratification by the Consortium Board.
- Assist the Project Co-ordinator to manage risks and take corrective actions where necessary.
• Assist in the logistic organisation of meetings and workshops relating to the project.
• Maintain a list of contacts
• Support project collaboration through administrative support of a set of appropriate tools (forms, spreadsheets, templates, styles, platforms)

<table>
<thead>
<tr>
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<th>Wolfgang Greller</th>
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</tbody>
</table>

2.2.5 Work Package Leader

A Work Package Leader manages each work package. He or she is responsible for the coordination of activities and the production of deliverables of that Work Package. The Work Package Leader cooperates with the Executive Committee to facilitate day-by-day project management on Work Package level.

Tasks and responsibilities

• The detailed planning of work package activities within the scope and timescale of the overall Description of Work (DoW).
• The timely delivery of milestones and deliverables as described in the work package
• Ensuring deliverables are of the quality as defined by the EC.
• Communicating current status of activities, progress and potential risks to the Coordinator and General Manager in a timely manner and without delay, including input for the Periodic Reports towards the European Commission.
• Coordinating the activities of the partners involved in the Work Package.
### Contact details

<table>
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<td>+31 45 5762174</td>
</tr>
</tbody>
</table>

### 2.2.6 General Manager

The General Manager heads the *idSpace* Secretariat, and serves as Secretary to the Consortium Board and the Executive Committee. The General Manager can represent the Project Coordinator as Chair of the Executive Committee.

**Tasks and responsibilities:**

- Head the Secretariat, coordinating the tasks related to the Secretariat
- Serve as Secretary to the Consortium Board
- Serve as Secretary to the Executive Committee

**Contact details**

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2.3 Project meetings

In idSpace we will organise at least two plenary project meetings annually. The location of these meetings will rotate between partners and is organised by the local party. The typical format is to have a 2-day closed project meeting, the first day of which is devoted to a plenary discussion of the progress in all work packages, and the second day to face-to-face discussions between work packages who have indicated the need to do so.

The purpose of the project meetings is to:

- Allow face-to-face meetings of the Consortium Board and/or the Executive Committee (days 1 and 2 respectively)
- Allow WP-partners to meet for face-to-face working sessions (day 2)
- Coordinate activities that cross Work Package boundaries
- Monitor and assess overall progress through formal and informal discussions between the Project Co-ordinator and the Work Package Leaders

All Consortium partners should send at least one person to the project meetings. At the very least, these should be people at the level of Work Package Leaders with a mandate to represent the beneficiary in question in all discussions. As a rule of thumb, the numbers of additional people will depend on the involvement of partners in different work packages to allow for their presence in parallel sessions. Members of the Consortium Board and the Executive Committee can be represented by proxy, provided the representative has the same mandate regarding decisions that are taken during the meeting as the person he/she is representing.

The agenda for the meeting is coordinated by the Secretariat, and circulated as a draft to the Work Package Leaders for comments and additions. It is passed to the hosting party for the logistic preparation of rooms, equipment, registration etc. For practical reasons, the hosting partner arranges the logistics implied by the agenda.
3 Reporting

Reporting requirements are based on Commission regulations as contained in the Grant Agreement, but there are also project-specific aspects. This section describes the various types of reports, the details of who compiles them and how, and the (internal) acceptance procedure.

3.1 Types of reports

Report types and submissions intervals.

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Internal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quarterly Progress Reports</td>
<td>Used for internal monitoring and to update the EU Project Officer on progress. Quarterly Progress Reports to be submitted to the Secretariat: • Report by Work Package Leader • Internal Consortium Costs Report</td>
<td>every 3 months</td>
</tr>
<tr>
<td>Mid-term Periodic Report</td>
<td>To be submitted to the Commission by the Secretariat at the end of each reporting period (12 months). • Periodic Activity Report • Periodic Report on the Use of Resources • Financial Statement (Form C – Annex VI GA)</td>
<td>month 12</td>
</tr>
<tr>
<td>Final Report</td>
<td>To be submitted by the Secretariat to the Commission at the end of the project in addition to the periodic reports for the last reporting period. • Final publishable Summary Report • Report on Wider Societal Implications • Plan for Use and Dissemination of Foreground</td>
<td>month 24</td>
</tr>
</tbody>
</table>

3.2 Internal report acceptance procedure

The following table lists the approval responsibilities regarding the various reports.

<table>
<thead>
<tr>
<th>Product and decision type:</th>
<th>Responsible body: CB EC PC WPL PS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal Consortium Report endorsement</td>
<td>D P A</td>
</tr>
<tr>
<td>Quarterly Progress Reports - per WP</td>
<td>D P A</td>
</tr>
<tr>
<td>Quarterly Progress Reports - aggregated</td>
<td>D P A</td>
</tr>
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<td>D P A</td>
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<tr>
<td>Internal Consortium Costs Reports - aggregated</td>
<td>D P A</td>
</tr>
</tbody>
</table>

2 For further details see ‘Project Reporting in FP7’, http://cordis.europa.eu/fp7/find-doc_en.html
### 3.3 Report compilation details

Report details and their compilation procedures are detailed below. ALL REPORTS need to be in ELECTRONIC FORMAT.

#### 3.3.1 Quarterly Progress Report – per WP

The report is compiled every three months for progress monitoring at Work Package and overall project level. The information on individual Work Packages is submitted by Work Package Leaders to the Secretariat.

**Collected data:**
The data are collected at the level of an individual Work Package, and pertain to:
- a) tasks started and finished
- b) general progress (overall status, results, risks, etc.)
- c) next steps
- d) activities at Task level.

**Aggregated report:**
The collected data are compiled into an aggregated version for presentation to the Executive Committee and Consortium Board. The aggregated version is submitted to the EU Project Officer for information only.

**Procedure:**
1. The *idSpace* Secretariat sends out the data collection spreadsheet or online form to the Work Package Leaders before the end of the three-month project period.
2. The Work Package Leaders collect the required information from the Task Leaders and active participants within the WP and returns the completed form to the Secretariat not later than 1 week after closure of the three-month period.
3. Once the Secretariat has received the data on all Work Packages, it compiles the ‘Aggregated Quarterly Progress Report’ (see below 3.3.3)
### 3.3.2 Internal Consortium Costs Report – per partner

The report is compiled every three months for internal financial monitoring at partner and overall project level, and submitted to the Secretariat.

**Collected data:**
The financial/human resource data are collected per partner (as the budget holder) and sent to the Secretariat for processing. Cost types included are: personnel (at the level of individual staff members), man-hours recorded, equipment, travel & subsistence, other direct costs, subcontracting, and indirect costs.

**Compiled report:**
The collected data are compiled into an aggregated version for presentation to the Executive Committee and Consortium Board.

This report is *not* submitted to the European Commission!

**Procedure:**

i. The Secretariat provides each Local Financial Contact with a spreadsheet in which the costs have to be entered on a 3-monthly basis, and which are then automatically accumulated.

ii. The completed spreadsheet should be received by the Secretariat no later than one week after the end of the three-monthly reporting period.

iv. Once the Secretariat has received all Cost Reports it compiles the ‘Aggregated Quarterly Progress Report’ (see 3.3.3 below)

### 3.3.3 Aggregated Quarterly Progress Report

Every three months, the Secretariat compiles an aggregated report, based on the Quarterly Progress Reports (3.3.1) and the Internal Consortium Costs Reports (3.3.2) received.

The report for the fourth quarter will be merged directly into the Periodic Activity Report (3.3.5).

**Collected data:**
The data are collected through the Quarterly Progress Reports and the Internal Consortium Costs Reports.

**Compiled report:**
The collected data are compiled into an aggregated version for presentation to the Executive Committee and Consortium Board.
Procedure:

i. Once the Secretariat has received the Quarterly Progress Reports and the Internal Consortium Costs Reports (see above) from all Work Packages, it compiles an aggregated version for presentation to the Executive Committee and the Consortium Board. This will be available no later than two weeks after receipt of the last WP-reports.

ii. In case the reported data raises concerns, the Secretariat may take this up with the Project Co-ordinator or Executive Committee immediately.

### 3.3.4 Periodic Report

The (mid-term) Periodic Report comprises a total of three reports that have to be submitted to the Commission at the end of the first reporting period (12 months). It covers an overview, including a publishable summary, of the progress of work.

This report should include the **differences** between the work expected to be carried out in accordance with the DoW and the work actually carried out.

Collected data:

The Periodic Report is to a large extent the aggregation and consolidation of the Quarterly Progress Reports and the Internal Consortium Costs Reports. In addition, the following information has to be provided:

<table>
<thead>
<tr>
<th>Information required for Periodic Report</th>
<th>Provided by</th>
</tr>
</thead>
<tbody>
<tr>
<td>Periodic Activity Report (3.3.5)</td>
<td>WP Leaders</td>
</tr>
<tr>
<td>An update of the Plan for using and disseminating the knowledge, as part of the Periodic Report</td>
<td>WP6</td>
</tr>
<tr>
<td>Explanation of the Use of Resources (3.3.6)</td>
<td>each partner</td>
</tr>
<tr>
<td>Financial Statement (‘form C’), together with an audit certificate for those partners for whom the financial Community contribution exceeds €150.000,- over the cumulative reporting periods (3.3.6)</td>
<td>each partner</td>
</tr>
<tr>
<td>Summary Financial Report consolidating the Community contribution of all beneficiaries (and third parties) in aggregated form (3.3.7)</td>
<td>Secretariat</td>
</tr>
</tbody>
</table>

Procedure:

i. The Secretariat will coordinate report compilation in assistance to the Executive Committee.

ii. The draft reports will be reviewed at an extraordinary (online or offline) meeting of the Executive Committee no later than two weeks after closure of the 12-month reporting period.

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ii. Depending on the outcome of that meeting, the drafts will be adjusted first, or may
be sent directly to the Consortium Board with a recommendation for their
approval. The complete and final set of reports shall be distributed to all parties at
least two weeks before the Consortium Board meeting (not later than five weeks
after closure of the 12-month reporting period).

iv. The Consortium Board discusses reports during its annual meeting, modifies or
amends them, if necessary, and accepts the final version for submission to the
Commission.

v. The approved reports will be submitted to the Commission no later than 60 days
after closure of the 12-month reporting period.

The procedure for compilation, approval and submission of each of the periodic re-
ports is detailed below.

3.3.5 Mid-term Periodic Activity Report

Provides an overview of project progress over the first 12 months, to be submitted to
the Commission. It covers activities actually carried out and contains records of
events organised and artefacts created. It should also explain what if any deviations
from the original plan obtain (DoW).

Collected data:
Data required to compile the report includes: activities carried out; progress in relation
to the project objectives; internal deliverables and deliverables’ status; problems
encountered (if any), how they were solved, and what impact this has on future
achievements. These data will to a large extent be derived from the Quarterly Progress
Reports that were compiled over the 12 month reporting period.

Compiled report:
The Mid-term Periodic Activity Report to a large extent consolidates the data
collected through the Quarterly Progress Reports and the Internal Consortium Costs
Reports. In addition, the following information will be provided in the Periodic
Activity Report:
- A publishable executive summary
- An updated Plan for using and disseminating the knowledge

Procedure:
i. WP6 will be asked to deliver an updated Plan for using and disseminating the
knowledge during month 11.
ii. After receiving the fourth Quarterly Progress Report, the Secretariat will produce
a compilation of all four Quarterly Progress Reports.
iii. The report will be reviewed at an extraordinary meeting of the Executive
Committee.
iv. For completion of the procedure, see 3.3.4 iii-v above.
### 3.3.6 Explanation of the Use of Resources

Provides an overview and justification of costs incurred and resources deployed over the past 12 months, to be submitted to the Commission.

Includes an explanation of personnel costs, subcontracting and any major costs incurred by each beneficiary, such as the purchase of important equipment, travel costs, large consumable items, etc. linking them to work packages.

**Collected data:**
Data required to compile the report will be derived from the financial administration as kept by the Secretariat. In addition, the following has to be provided by each beneficiary:
- Form C (Annex VI to the contract): ‘Financial Statement for Collaborative Projects’.

**Compiled report:**
The compiled financial report will comprise the costs incurred of all partners and the Consortium as a whole.

**Procedure:**
i. The Secretariat will start compiling a first draft of the Explanation of Resource Use in month 11 of the project.
ii. The contractors submit completed Forms C no later than one week after the end of month 12.
iii. As soon as the Internal Consortium Costs Reports for the past quarter have been received (no later than one week after the end of month 12), the draft will be consolidated.
iv. The report will be reviewed at an extraordinary meeting of the Executive Committee no later than two weeks after closure of the 12-month reporting period (for completion of the procedure, see 3.3.4 iii-v above).
v. Where required, the partners will submit the Audit Certificates no later than three weeks after the end of month 12 for inclusion in the report that will be sent to the Consortium Board (the audit can be invoiced under the next reporting period).
### 3.3.7 Summary Financial Report

Records the distribution of funding to each contractor over the first 12 months, to be submitted to the Commission.

**Collected data:**
Data required to compile this report will be derived from the Internal Consortium Costs Reports that were accumulated over the 12-month reporting period.

**Compiled report:**
Overview of funding distribution to each beneficiary.

**Procedure:**

i. The Secretariat will compile the distribution overview on the basis of the accumulated Internal Consortium Costs Reports received (no later than one week after the end of month 12).

ii. The report will be reviewed at an extraordinary meeting of the Executive Committee no later than two weeks after closure of the 12-month reporting period.

iii. For completion of the procedure, see 3.3.4 iii-v.
4 idSpace Assessment Protocol

In idSpace we qualify and quantify project output. At the outset, it should be stipulated that these norms are prescriptive in the sense that all partners are expected to live up to them. Complying with them will add to the overall quality and visibility of the project as a whole as well as of the individual partners. However, the norms are not enforceable in the sense that project funding depends on whether they have been met or not.

As a benchmark, idSpace expects every 1 scientific full time equivalent (FTE) to produce 3 scientific publications a year, or the equivalent in technologies. FTEs are computed on the basis of project involvement in terms of person months, 1 FTE is equivalent to 12 person months. Typically, output will not be spread evenly over the project’s duration is allowances need to be made for the start up period. On the other hand, towards the end more output can be expected as the time of harvesting on the efforts put in then has come.

The project secretariat will compute output on the basis of data submitted by the partners. As always, in case of conflicts about decisions made by the secretariat, the Consortium Board will make the final decision.

4.1 idSpace output types

idSpace deliverables comprise reports and prototypes. In addition to these deliverables, idSpace also produces outputs typically related to the RTD activities it carries out in its two year life-cycle:

- Scientific publications and technologies\(^4\) resulting from RTD activities (WP1-5)
- A variety of non-RTD dissemination (valorisation) activities (WP6)

For the RTD outputs the idSpace assessment protocol defines:

- The (qualitative) criteria the output should meet
- The appraisal mechanism for awarding ‘output points’
- The (quantitative) productivity, or output norm required

For the valorisation activities, the impact will be assessed

- using a set of indicators on project output consultation and use according to different target groups.

Obviously, the accuracy with which output, produced and expected, can be calculated decreases from publications via technology to valorisation.

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\(^4\) Technologies are the artifacts that are developed in the project, such as software, specifications and methods/models.
4.2 RTD output types and quality criteria

The quality and the productivity criteria of the RTD outputs (WP1-5) can be divided into two categories: scientific publications and technologies. As an RTD project, *idSpace* output should meet internationally recognised standards. Consequently, the *idSpace* Assessment Protocol is based upon, and is in line with, internationally approved protocols, more specifically the Standard Evaluation Protocol (Standard Evaluation Protocol 2003 – 2009 For Public Research Organisations - ISBN 90-5588 278x, 2003).

Scientific publications cover:
- journal articles
- (chapters in) books
- conference and (scientific) workshop papers

Technologies cover artefacts that are developed in the project:
- use cases, scenarios, specifications
- methods/models
- software

The quality criteria for each of these output types are outlined below.

Please note that, **all output**:
- **must** contain the following acknowledgment:
  
  "The *idSpace* project is partially supported/co-funded by the European Union under the Information and Communication Technologies (ICT) theme of the 7th Framework Programme for R&D"

- **must** contain the following disclaimer:
  
  "This document does not represent the opinion of the European Union, and the European Union is not responsible for any use that might be made of its content"

4.2.1 Peer-reviewed journal articles and (chapters) in books

As a rule, journals that are fit for publication fulfil the following demands:
- Are SCI/SSCI journals, including open access journals, see http://www.isinet.com/cgi-bin/jrnlst/jloptions.cgi?PC=master
- Publish in the English language
- Publish papers mainly from international sources (so journals that publish mainly local papers are excluded)
- Publish at regular intervals
- Only accept papers counting 2000 words or more.
4.2.2 Chapters in books

For books only scientific publishers that use a scientific review system will be granted output points.

4.2.3 Scientific conference and workshop papers

As a rule conference and workshop papers count for output points if the following criteria are met:
- The conference/workshop has had an open call for papers.
- The conference/workshop is public.
- A significant number of submissions is rejected.
- The conference/workshop uses a regular peer-review system that is performed by a public scientific board.
- The papers are published by an international scientific publisher (e.g. Springer Lecture Notes, IEEE, ACM), but also less well-known publishers can be included as long as the proceedings can be ordered through any bookshop in the world.

4.2.4 Technology output

To make the technology output equivalent to the publication output, similar criteria for technology output are used as for publications:
- The technology foreground is publicly available and accessible (e.g. through open-source channels like sourceforge.net).
- Members of the relevant RTD community can replicate the work on the basis of the documentation provided, i.e. rebuild alternative technologies on the basis of the requirements and the design.
- Members of the relevant RTD community can continue to work on and elaborate the technologies.
- The output is peer reviewed, e.g. for software this can be operationalised in that the software is used by others (number downloads, number of questions, number of contributions, etc.).

The output quality of prototypical software is assessed against the following criteria:
- Software scope qualitative
- Software coding qualitative

Software scope qualitative criteria. Any software eligible for output points should comply with the following three criteria:
- **Relevance**: How relevant is the software for the further development of the domain?
- **Significance**: How important is the problem addressed by the software for the domain? Does the software have a community of users?
- **Originality**: Are the problems and approaches new? Is this a novel combination of existing techniques?
**Software coding qualitative criteria.** Software that is eligible for any output points should meet the following quality assurance criteria.

- **Code readable:** Readable code includes systematic naming conventions and good formatting/indentation.
- **Code commented:** In Java based projects, JavaDoc comments should be used to drive HTML based documentation. Equivalent technologies to drive XML output are available in .NET (for example NDoc).
- **Code structured:** Well-structured code refers to the way in which the code is modularised and the way in which code modules are grouped together. Good package naming conventions in Java and name spacing in .NET are evidence of a thoughtful approach to code structure.
- **Code efficiency:** Although performance profiling is often addressed mostly at the later stages of a prototype (through tools such as JProfiler), code should be written with performance in mind. Evidence of this will include judicious choice of variable data types and appropriate data structures, CPU and memory efficient operations, appropriate choice of XML parsing tools etc.
- **Testing:** Although there is some overhead required to put unit testing in place, developers who use it, find that unit testing saves development time. In principle, best practice is for each algorithm method to focus on one operation and for each method to be testable using a single unit test. In Java based projects, JUnit is a popular unit test framework. In .NET, NUnit is an equivalent.
- **Deployment:** All software and documentation should be written in such manner that is possible to install and run this software on a different environment than the one that is used for the development. This should not require any re-factoring in the code.
- **API documentation available:** Typically linked from the project website. The API documentation should be kept in sync with the source code by using a technology such as JavaDoc (for Java projects) or NDoc (for .NET projects).
- **Source code publicly available with archive facility** (e.g. Source Forge): Even with a well developed project website, source code should also be maintained on a public website with archiving facility.
- **Licensed and download available:** Typically a download is linked from the project website. The download should only be made available once appropriate licensing is in place.

### 4.2.5 Other papers and code

In addition to the peer-reviewed journal articles, (chapters in) scientific books and scientific conference/workshop papers described above, the following additional types of papers are of relevance to *idSpace* and its stakeholders:

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5 *Software Quality Assurance (QA) and Open Source Maturity Model (OSMM) Development*, retrieved from http://www.jisc.ac.uk/uploaded_documents/ACFCDE.doc
• Papers which report on project work, but which are not in approved journals (for example short papers presented at project workshops, but which are not selected for inclusion in the journal).
• Papers which mention idSpace, but are not reporting on the execution of work foreseen in and described by the Description of Work.

Although such articles do not count towards the output score, they should be reported in the quarterly progress reports and be made available publicly and to the reviewers, stating clearly their status.

Similar rules apply to code, documentation etc. that serves non-scientific purposes. Such code etc. should be reported, but is not awarded output points. Note that such papers should also contain the imperative acknowledgement and disclaimer mentioned at the start of this section.

### 4.3 Awarding RTD output points

The various RTD outputs described above are appraised as follows:

<table>
<thead>
<tr>
<th>Category</th>
<th>Output</th>
<th>Points</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scientific output</td>
<td>Refereed SCI/SSCI journals</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Journals on extension list</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Book chapters</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Conference papers</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Reviewed workshop contributions</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Books</td>
<td>3</td>
<td>Divided by the number of authors</td>
</tr>
<tr>
<td>Technology output</td>
<td>Software source code</td>
<td>≥ 1</td>
<td>see: RTD output norms, Technology output</td>
</tr>
<tr>
<td></td>
<td>Software documentation</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Specification</td>
<td>≥ 1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Models, Methods, etc.</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

Awarding output points for scientific output is rather straightforward. For technology output there is no well established and widely accepted procedure. Software eligible for output points in idSpace should represent a significant amount of work, equivalent to four months of effort for a senior scientific developer. Reuse of code of others should be exempted and does not count for the output.
4.4 **RTD output norms**

`idSpace` uses the customary scientific output norm, i.e. every scientific full time equivalent (FTE) produces three scientific publications a year, or the equivalent in technologies. This translates into 1 point per 4 person months in the project.

The number of points that a certain technology output will gain depends on the normative input size: three output points are earned for a technology that is developed and delivered by each FTE technologist in the period of one year.

However, given the design and development approach that is followed, the project output will not be distributed evenly over the full project period. And in particular for the technology and academic publications the output can only be produced after some considerable work in the project. Also, the habitual delay in the scientific publication process should be taken into account. An output point is counted for every published paper, but the publication process for some journals may take between 1-2 years. For this reason, we will always report on publications that are 'in the pipeline' (with a status indicator: submitted, accepted, or in print).

### 4.5 Valorisation impact appraisal

The impact of the dissemination and publicity activities carried out in WP6 on the target audiences cannot be directly measured and will be derived from a set of indicators. The following indicators serve as an indication of what may be used in the process of underpinning valorisation impact.

**Impact information overview table**

<table>
<thead>
<tr>
<th>Impact indicator</th>
<th>Verification method</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Number of training sessions, the number of attendees, their background and their interests and appreciation</td>
<td>questionnaire</td>
</tr>
<tr>
<td>2 Number of workshops, the number of attendees, their background and their interests and appreciation</td>
<td>questionnaire</td>
</tr>
<tr>
<td>3 Number of software downloads</td>
<td></td>
</tr>
<tr>
<td>4 Number of questions on the website, the background of the questioner, the response time, the appreciation</td>
<td>questionnaire</td>
</tr>
<tr>
<td>5 Number of news items posted, the number of news members; their background and their appreciation</td>
<td>questionnaire</td>
</tr>
<tr>
<td>6 Number of visits on the web site, the background of the visitors, the type of information they read, their appreciation</td>
<td>statistics, survey</td>
</tr>
<tr>
<td>7 Number of web references to <code>idSpace</code></td>
<td>web statistics</td>
</tr>
</tbody>
</table>

These output efforts should carry the acknowledgement and, if appropriate, disclaimer mentioned in section 4.2. They should also carry the `idSpace` logo and the community flag. The FP7 logo is optional.
4.6 Submitting output

All output produced by idSpace - articles, papers, presentations, software, specifications, etc. – should be uploaded to the directory that the Coordinator has set up specifically for this purpose on the project site <http://partners.idspace-project.org>. A message containing a link to this document should be added to the forum. The message should contain the full bibliographical description, using APA Style (see below). The file directory will be used to calculate output points, the bibliographical description to report on output. We will use the dissemination log that has been set up for this purpose.

The Publication Manual of the American Psychological Association (Washington DC: American Psychological Association) contains an extensive list of format to be used. The following examples show the format for a journal paper, book chapter, a contribution to a conference proceeding and a presentation, respectively:


Only submit documents in PDF format (except source code); so create a PDF of your documents and PowerPoint presentations before submitting. Whenever a document’s status is changed, say from in press to published, or its bibliographical details are updated, or the document itself is changed, do so by appending a message describing the change to the original message. Do not add a new message as this hampers proper bookkeeping of the output.

At quarterly intervals, all new output documents will be added to the publicly accessible DSpace repository <dspace.ou.nl> that the OUNL maintains. They will be added to the Learning Networks & Learning Design collection and the tag ‘idSpace’ will be added to all submissions so as to ease their retrieval. As the IdSpace repository is meant to last ‘forever’, the project will thus have a single, lasting home for all project output.
5 Licencing of idSpace foreground

The idSpace project has to build jointly and collaboratively new foreground which is based on existing proprietary background. Open sourcing these backgrounds has not been made mandatory in the Consortium Agreement. There is no need to do so either as long as commercial background to the project that is needed by the partners, in particular the Microcosmos platform and the topic map tooling, will be available as compiled code to the Consortium partners for project development purposes (not in source code). However, it is in all partners’ interest to have the project foreground the widest possible impact, which includes honouring the legitimate commercial interests of particularly the business partners.

To serve these interests, a distinction should be made between content (text documents such as papers, supporting texts, brochures, etc.) on the one hand and software code on the other.

5.1 Text document

Text documents are to be made available under a ‘Creative Commons Licence’. This licensing scheme also applies to scholarly publications, to the extent that a particular journal publisher has no objections to making pre-printed versions of articles commonly available under an open license. A Creative Commons Licence is a licence that allows users several rights to a work, such as the rights to access, multiply and distribute it, while retaining intellectual authorship and setting particular conditions. Conditions are for example attribution (naming of the author), restricted to non-commercial use, disallowing modifications. In the idSpace project when referring to a Creative Common Licence for content outputs, we imply restrictions to attribution, share-alike and non-commercial use. The text to be added to the pertinent output is:

This document is licensed under a Creative Commons Attribution-Non-commercial-Share Alike 3.0 <fill in country of licensor> License. Licensees who copy, distribute or display this work or a derivate should include the following acknowledgement:

The present document was produced by <fill in authors of work> in the context of the idSpace project. This project has been partially supported/co-funded by the European Union under the Information and Communication Technologies (ICT) theme of the 7th Framework Programme for R&D. This document does not represent the opinion of the European Union, and the European Union is not responsible for any use that might be made of its content.

The terms are to be explained as follows in lay terms (see for the legalese the Creative Commons website <creativecommons.org>.

Attribution. Allows others to copy, distribute, display, and perform our copyrighted work, and derivative works based upon it if they give the authors credit.

Non-commercial: others may copy, distribute, display, and perform our work, and derivative works based upon it, for non-commercial purposes only.
**Share Alike:** Others are allowed to distribute derivative works only under the Creative Commons Attribution-Non-commercial-Share Alike 3.0 license.

Parenthetically, this also applies to text documents produced by consortium partners and re-used in publications by other consortium partners. As a matter of courtesy, an acknowledgement to the following effect could be included, identifying the original authors by name:

*This chapter/publication/report draws extensively on Deliverable X of the idSpace project. We gratefully acknowledge the work of our colleagues in the idSpace project team.*

If at all appropriate, the *idSpace* team as a whole could be mentioned as such, identifying its team members in a footnote. The latter would allow individual team members more easily to support claims of having participated in and contributed to the *idSpace* project.

### 5.2 Software code

As far as software code output is concerned, in the context of the project, this refers to adapters (to connect compiled code), plug-ins and extensions to compiled code.

All are to be counted as foreground, and are to be distributed using an Open Source license, so that further use and improvements can be made outside the context of the present project. The *Lesser GPL* license will be adopted. As it is directed to software libraries rather than entire programs, it fits the project’s aim of producing adapters better than, for instance, the BSD license.

To accommodate the plug-ins and extension modules, changes to the core code or even new functionality may have to be needed. Architectural changes to Microcosmos and changes to the core code, where these are enveloped in the Microcosmos platform, will remain under the ownership of EMS, but EMS should provide the necessary APIs. If the project requires changes to the core code or extensions of it, it will be incumbent upon EMS to develop these and provide the APIs to the consortium.

The lesser General Public License (lesser GPL) is a kind of free software and grants the four following freedoms (after the Creative Commons site description):

1. The freedom to run the program for any purpose.
2. The freedom to study how the program works and adapt it to one’s needs.
3. The freedom to redistribute copies so to help others.
4. The freedom to improve the program and release improvements to the public, so that the whole community benefits.

Note that the lesser GPL, in contrast with the GLP, in no way affects the ability of the copyright holder or licensees to incorporate the foreground in proprietary software. Thus, commercial use of the foreground is allowed or even promoted.

For details on how to use the lesser GPL, see <http://www.gnu.org/licenses/gpl-howto.html>. In particular, first all software produced as foreground should contain a
This program is free software: you can redistribute it and/or modify it under the terms of the GNU General Public License as published by the Free Software Foundation, either version 3 of the License, or (at your option) any later version. This program is distributed in the hope that it will be useful, but WITHOUT ANY WARRANTY; without even the implied warranty of MERCHANTABILITY or FITNESS FOR A PARTICULAR PURPOSE. See the GNU General Public License for more details. You should have received a copy of the GNU General Public License along with this program. If not, see <http://www.gnu.org/licenses/>.

Third, all documentation to the foreground software should contain the following specification of the conditions under which others may make use of it (reproduced from the Creative Commons’ site <http://creativecommons.org/licenses/LGPL/2.1/>):

- You must conspicuously and appropriately publish on each copy distributed an appropriate copyright notice and disclaimer of warranty and keep intact all the notices that refer to this License and to the absence of any warranty; and give any other recipients of the Program a copy of the GNU Lesser General Public License along with the Program. Any translation of the GNU Lesser General Public License must be accompanied by the GNU Lesser General Public License.
- If you modify your copy or copies of the program or any portion of it, or develop a program based upon it, you may distribute the resulting work provided you do so under the GNU Lesser General Public License. Any translation of the GNU Lesser General Public License must be accompanied by the GNU Lesser General Public License.
- If you copy or distribute the program, you must accompany it with the complete corresponding machine-readable source code or with a written offer, valid for at least three years, to furnish the complete corresponding machine-readable source code.
- Any of the above conditions can be waived if you get permission from the copyright holder.

Finally, as specified in the copying permission, a copy of the lesser GPL should be added to the documentation as well as the acknowledgement and waiver demanded by the European Commission:

The present document was produced by <fill in authors of work> in the context of the idSpace project. This project has been partially supported/co-funded by the European Union under the Information and Communication Technologies (ICT) theme of the 7th Framework Programme for R&D. This document does not represent the opinion of the European Union, and the European Union is not responsible for any use that might be made of its content.
# 6 Deliverable appraisal and submission

In this section we describe the procedure for internal appraisal of deliverables and the submission process to the Commission.

## 6.1 Deliverables overview

The table below shows the deliverables list as in section B. 1.3.4 of the Description of Work.

<table>
<thead>
<tr>
<th>Del. No.</th>
<th>Deliverable name</th>
<th>WP no.</th>
<th>Lead beneficiary</th>
<th>Est. Ind. Person months</th>
<th>Nature</th>
<th>Dissemination level</th>
<th>Delivery Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>D6.1</td>
<td>Dissemination plan and log</td>
<td>WP6</td>
<td>UPRC</td>
<td>3</td>
<td>O</td>
<td>PU</td>
<td>M4</td>
</tr>
<tr>
<td>D6.2</td>
<td><em>idSpace</em> public web site</td>
<td>WP6</td>
<td>UPRC</td>
<td>5</td>
<td>O</td>
<td>PU</td>
<td>M4</td>
</tr>
<tr>
<td>D6.3</td>
<td><em>idSpace</em> flyer</td>
<td>WP6</td>
<td>UPRC</td>
<td>2</td>
<td>O</td>
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<td>WP1</td>
<td>OUNL</td>
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<td>PU</td>
<td>M6</td>
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<tr>
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<td>R</td>
<td>PU</td>
<td>M9</td>
</tr>
<tr>
<td>D4.2</td>
<td><em>idSpace</em> platform &amp; user guide v1</td>
<td>WP4</td>
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<td>10</td>
<td>P</td>
<td>RE</td>
<td>M9</td>
</tr>
<tr>
<td>D5.2</td>
<td>Evaluation plan &amp; planning</td>
<td>WP5</td>
<td>LINK</td>
<td>8</td>
<td>R</td>
<td>PU</td>
<td>M9</td>
</tr>
<tr>
<td>D5.3</td>
<td>Report evaluation results v1</td>
<td>WP5</td>
<td>LINK</td>
<td>15</td>
<td>R</td>
<td>RE</td>
<td>M11</td>
</tr>
<tr>
<td>D7.3</td>
<td>Periodic progress report, 1</td>
<td>WP7</td>
<td>OUNL</td>
<td>5</td>
<td>R</td>
<td>CO</td>
<td>M12</td>
</tr>
<tr>
<td>D4.3</td>
<td>Design document v2</td>
<td>WP4</td>
<td>EMS</td>
<td>4</td>
<td>R</td>
<td>PU</td>
<td>M13</td>
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<tr>
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<td>14</td>
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<td>PU</td>
<td>M18</td>
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<tr>
<td>D2.3</td>
<td>Semantic meta-model, v2</td>
<td>WP2</td>
<td>AAU</td>
<td>10</td>
<td>R</td>
<td>PU</td>
<td>M18</td>
</tr>
</tbody>
</table>
6.2 Internal acceptance procedure for deliverables

Provision of deliverables is the responsibility of the Work Package Leader. Advice on the quality of a deliverable will be provided through the internal review process, the nature of which depends on the deliverable. Final approval of the deliverable before submission to the Commission is the responsibility of the Project Co-ordinator.

Submitted deliverables will be distributed to two (2) internal reviewers with expertise in that field of work. In case pertinent expertise is unavailable or external expertise is needed in the interest of assuring the quality of the output, WP Leaders are free to suggest reviewers outside the consortium.

<table>
<thead>
<tr>
<th>Days after due date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>No later than due date (end of month indicated as delivery month).</td>
<td>Deliverable submitted to Consortium Secretariat (<a href="mailto:wolfgang.greller@ou.nl">wolfgang.greller@ou.nl</a>; <a href="mailto:mieke.haemers@ou.nl">mieke.haemers@ou.nl</a>).</td>
</tr>
<tr>
<td>No later than due date plus 1</td>
<td>Selected reviewers receive deliverable and start review.</td>
</tr>
<tr>
<td>No later than due date plus 14.</td>
<td>Reviewers report back to Consortium Secretariat; Secretariat reports reviews to Work Package Leader, possibly with recommendations for a course of action; revision starts.</td>
</tr>
<tr>
<td>No later than due date plus 28 days.</td>
<td>Resubmission by Work Package Leader of Deliverable to Consortium Secretariat. Start preparing by Secretariat deliverable for submission to Commission.</td>
</tr>
<tr>
<td>No later than due date plus 60 days.</td>
<td>Consortium Co-ordinator submits deliverable to Commission (Project Officer).</td>
</tr>
</tbody>
</table>

To be able to review a deliverable properly, it should be submitted to the Secretariat no later than the due date (end of the month indicated as delivery date) to allow...
enough time for review (2 weeks) and adjustments (2 weeks) before it is due for submission to the European Commission. Reviewers will be asked to report back in two (2) weeks and deliver their (qualified) acceptance statement as mentioned in Section 3 (accept/minor revision/major revision/reject). Amendments eventually required need to be completed by the end of the 4th week (day 28) or, in case of substantial revisions, the 5th week (day 35) after due date. The extension to five weeks needs to be negotiated with the Consortium Secretariat. The remaining time is need for the final editing and processing the Secretariat needs to carry out before submission of the deliverable to the European Commission.

6.3 Internal review of deliverables

The table below provides an overview of the deliverable numbers and names, the lead beneficiary under whose responsibility the deliverable has been produced, the beneficiaries that are suggested to participate in the review, the delivery date, and the kind of feed-back that is expected.

Apart from minding such general aspects as being grammatically correct, readable and well-structured, feedback should address the specific nature of the deliverable in question. A state-of-the-art report thus differs from a design document. Section B.1.3.1 of the Description of work contains detailed descriptions for each work package of what it seeks to achieve. The reviewers will want to use these descriptions as yardsticks against which to measure the extent to which a deliverable achieves what has been promised. The table below lists in a very succinct way some of the most obvious criteria. Reviewers may of course add criteria they deem relevant.
<table>
<thead>
<tr>
<th>Del. No.</th>
<th>Deliverable name</th>
<th>Lead beneficiary</th>
<th>Suggested reviewing beneficiaries</th>
<th>Delivery Date</th>
<th>Criteria for feedback</th>
</tr>
</thead>
<tbody>
<tr>
<td>D6.1</td>
<td>Dissemination plan and log</td>
<td>UPRC</td>
<td>All</td>
<td>M4</td>
<td>Adequate, varied, comprehensive</td>
</tr>
<tr>
<td>D6.2</td>
<td><em>idSpace</em> public web site</td>
<td>UPRC</td>
<td>All</td>
<td>M4</td>
<td>Attractive, accurate, complete</td>
</tr>
<tr>
<td>D6.3</td>
<td><em>idSpace</em> flyer</td>
<td>UPRC</td>
<td>OUNL, SAS</td>
<td>M4</td>
<td>Attractive, succinct, catchy, accurate</td>
</tr>
<tr>
<td>D1.1</td>
<td>Baseline report ped. strat.</td>
<td>OUNL</td>
<td>UCY, AAU</td>
<td>M6</td>
<td>Well-researched, informative and useful</td>
</tr>
<tr>
<td>D2.1</td>
<td>State of the art in tools</td>
<td>AAU</td>
<td>UONL, UCY</td>
<td>M6</td>
<td>Well-researched, informative and useful</td>
</tr>
<tr>
<td>D3.1</td>
<td>Description of context awareness</td>
<td>UCY</td>
<td>AAU, OUNL</td>
<td>M6</td>
<td>Well-researched, informative and useful</td>
</tr>
<tr>
<td>D4.1</td>
<td>Design document v1</td>
<td>EMS</td>
<td>UCY, UNI, HILD</td>
<td>M6</td>
<td>Comprehensive, adequate</td>
</tr>
<tr>
<td>D5.1</td>
<td>Report on user requirements</td>
<td>LINK</td>
<td>EMS, OUNL</td>
<td>M6</td>
<td>Well-researched, informative, useful</td>
</tr>
<tr>
<td>D7.1</td>
<td>Consortium Handbook</td>
<td>OUNL</td>
<td>All</td>
<td>M6</td>
<td>Comprehensive, useful, usable</td>
</tr>
<tr>
<td>D7.2</td>
<td>Quality standards plan</td>
<td>OUNL</td>
<td>All</td>
<td>M6</td>
<td>Comprehensive, useful, usable</td>
</tr>
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<td>EMS, MORPH</td>
<td>M9</td>
<td>Comprehensive, adequate</td>
</tr>
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<td>AAU</td>
<td>MORPH, SAS</td>
<td>M9</td>
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</tr>
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<td>SAS, EMS</td>
<td>M9</td>
<td>Comprehensive, adequate</td>
</tr>
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<td>EMS</td>
<td>UPRC, LINK</td>
<td>M9</td>
<td>Informative, complete, useable</td>
</tr>
<tr>
<td>D5.2</td>
<td>Evaluation plan &amp; planning</td>
<td>LINK</td>
<td>HILD, AAU</td>
<td>M9</td>
<td>Adequate, complete, useful, workable</td>
</tr>
<tr>
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<td>Report evaluation results v1</td>
<td>LINK</td>
<td>HILD, AAU</td>
<td>M11</td>
<td>Comprehensive, accurate</td>
</tr>
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<td>D7.3</td>
<td>Periodic progress report, 1</td>
<td>OUNL</td>
<td>All</td>
<td>M12</td>
<td>Accurate, balanced reflection of progress thus far</td>
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<td>EMS, MORPH</td>
<td>M18</td>
<td>Comprehensive, adequate</td>
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<tr>
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<td>AAU</td>
<td>MORPH, SAS</td>
<td>M18</td>
<td>Comprehensive, adequate</td>
</tr>
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<td>SAS, EMS</td>
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<td><em>All</em></td>
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</table>

### 6.4 Submission of deliverables to the Commission

Deliverables should be submitted to the Commission on the due date as specified in the DoW, with a maximum contractually permitted delay of 60 days. Any further delay in the submission of a deliverable must be reported in the Quarterly Progress Report or the Periodic Activity Report. If one or more of the partners are late in submitting deliverables, the Co-ordinator may proceed submitting those deliverables to the Commission which are ready.

Deliverables are often written reports but can also take another form, for example the completion of a prototype, etc. In such cases, the deliverable should also be documented in a written record of the accomplishment of such deliverable, including any available supporting material.

Deliverables are submitted to the Commission electronically as for project reports, unless otherwise specified in the DoW. Each deliverable has a standard front page. Note that the formal approval of deliverables by the Commission forms part of the periodic review process.
6.5 Hints for writing deliverable reports

In writing deliverable reports, please keep in mind the following:

- You are not only writing for your close colleagues, but also for the members of the Review Committee!
- Structure the document well:
  - Always include an executive summary (and have it proof-read by a project partner).
  - Use the main text body for the ‘central message’ and use annexes for (technical) details, research findings, articles, etc. that are not necessary to follow the general line of reasoning.
  - When a document may be of interest to different audiences, include a ‘readers guide’.
- Use the same - preferably rather formal - style throughout the report.
- If you do not feel secure about writing in English, have your text checked by a colleague who is a native English speaker, or by a professional translator.
- The template for the front page of deliverables, that meets the EU requirements is found on our Moodle project site under ‘All Partner News and Documents’.
7 External project review procedure

A periodic project review will be organised by the Commission at the end of the first reporting period (12 months) to assess the work carried out. The review may be carried out by the Commission alone, or by the Commission with the support of external experts appointed by the Commission.

According to Commission documents, the review will principally assess:
- the degree of accomplishment of the project work plan for the period
- the degree of accomplishment of the deliverables
- the necessity of the resources that the contractors have deployed
- the management aspects of the project
- the likelihood to achieve the results aimed at by the project
- the planning of the next period
- the plan for using and disseminating the foreground

Also, the review will be based on the written material submitted by the project (reports and deliverables), and may additionally involve a “hearing and/or review procedure” with project representatives. The exact timing for performing the review, including any hearing, will be fixed so that the 60 days deadline for report submission, and the 45 days for approval by the Commission can be met.

Finally, the outcome of the review will be communicated in writing to the project Coordinator. This may include recommendations to be taken into account in the project’s planning of the next period.
8 Overall project evaluation

8.1 The goals of idSpace validation

The validation strategy as shall be described by D5.2 (Evaluation Plan) focuses on three aspects:

1. Evaluation of the effectiveness of project outcomes. This will be carried out as part of the activity cluster ‘Pilots with & Validation of the Integrated System’. Highly focused pilots in a challenging and authentic environment are the major instruments in this strategy.

2. Validation of the technical performance of project outcomes. This consists of ensuring that the technical systems produced by the project conform to their requirements set out in verifiable form in the specifications documents, and that the component parts of the system interoperate as planned.

3. (Self-)assessment of project processes and documentation. This consists of ensuring that optimum processes are in place for the development of project documentation and deliverables, and that all project deliverables and services are evaluated and optimised.

In this section we cover the first two aspects; the third aspect is covered in sections 2, 3, 4 and 6 of this Handbook. Sections 8.3 and 9 below describe the guidelines for software development and integration - including testing - to be used within Work Packages.

8.2 Effectiveness evaluation of the project outcomes

The whole idSpace project may be seen as a research undertaking which

- Identifies a set of problems in distributed innovation
- Hypothesises that a specific set of functionalities will improve distributed innovation
- Develops an infrastructure to prototype those functionalities
- Runs pilots to test the hypothesis

Effectiveness evaluation therefore should focus on these problems and their solutions as provided by the project. The major vehicle for effectiveness evaluation is the use of expert reviews and pilots throughout the two and a half project cycles.
8.3 Technical testing and validation

It is essential that the idSpace integrated system performs satisfactorily from a technical point of view before it is piloted with users in order to establish its effectiveness for the purposes for which it was designed. The role of technical testing in the project is to ensure the quality and coherence of the integrated system, and in particular the code produced by the project in the context of WP4. The technical testing focuses on unit testing and integration testing.

The purpose of **unit testing** is to verify that each individual component functions according to the technical specifications. The procedure searches for defects in, and verifies the functioning of, software elements (e.g. modules, programs, objects, classes, etc.) that are separately testable. This may be done in isolation from the rest of the system, depending on the context of the development life cycle and the system. Unit testing is typically done by the programmer and not by testers, as it requires detailed knowledge of the internal program design and code.

The purpose of **integration testing**, on the other hand, is to verify that the interaction between the various units which make up the integrated system is satisfactory. According to the plan the implementer delivers a component which has been successfully unit tested to the integrator. The integrator merges this component into intermediate builds. Step by step each component will be integrated according to the build plan. After each step, the intermediate build is submitted to the integration test. This procedure ensures that each component added is compatible with the components which have already been integrated.
9 The Use of a CVS Repository in idSpace

9.1 Background

To the extent that this is possible in view of IP rights on existing background, the idSpace development process works in an open manner, utilising an Open Source licensing model and attempting to maintain transparency at all levels. This transparency is served best by ensuring that all code, documentation and development artefacts are available in a Concurrent Versions System (CVS) Repository, such as SourceForge. Obviously, striving for transparency should not get in the way of making sufficient and timely progress. Because of this, a CVS different than SourceForge may be used, as long as the second and final version of the system will be made available through SourceForge. That way, services such as issue tracking, forums, Subversion Repositories, and project presence may be used to benefit the visibility of the project and the dissemination of its results.

9.2 House Rules

In order to maintain good housekeeping for using the CVS repository in the project rules effectively similar to the following should be put in place:

1. Committed code should at all times be ready to be compiled.
2. Committed code should at all times be ready to be run.
3. Developers should check out the latest code from CVS before committing their own changes
4. Any code conflicts should be resolved between developers
5. Module naming conventions should be adhered to.
6. Library files should be named according to their version.

9.3 Component Owners

Each component or other coherent piece of software in the idSpace system will be assigned a Component Owner. The Component Owner is the organisation, university, or company that created it. When a component requires changes from a non-Component Owner, any changes should be discussed with the Component Owner first. The Component Owner decides how to handle changes. Depending on the required changes the Component Owner could either

- update the central data API, or
- allow the developer to make the changes himself, or
- allow the developer to submit a patch file.
10 Risk management

Risk management in idSpace takes place at three levels:

1. At the strategic level. Risk management here concentrates on the relation between the project and the consortium. Risk management at this level is the responsibility of the Consortium Board.
2. At the tactical level. Risk management here concentrates on the Work Packages’ contribution to the project objective. Risk management at this level is the responsibility of the Executive Committee.
3. At the operational level. Risk management here concentrates on the activities within the work packages, which is the responsibility of the Work Package Leader.

The following procedures and tools should prove sufficient for risk detection and management:

- Monitoring through the Quarterly Progress Reports (see section 3.3.1).
- The idSpace assessment protocol to quantify partners’ scientific outputs (section 4)
- The quality assurance procedure for deliverables (section 6)
- The software development procedures (section 8)
- The project meetings, at least every six months, with all project partners.
- The Moodle on-line project environment for continuous documentation, where all WPs discuss and present their day-to-day activities.
Appendix 1: Deliverable Review Form
# Deliverable Review Form

<table>
<thead>
<tr>
<th>Reviewer Name:</th>
<th>Wolfgang Greller</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affiliation, Country</td>
<td>OUNL, NL</td>
</tr>
<tr>
<td>Deliverable Number</td>
<td>Deliverable 6.1</td>
</tr>
<tr>
<td>Deliverable Title:</td>
<td>D 6.1 – Dissemination Plan and Log</td>
</tr>
</tbody>
</table>
Please rate the following 4 points:

1. **Relevance** of the deliverable [1 (very low) - 6 (very high)]:
   (E.g.: Does the deliverable address the project objectives as specified in the Description of Work)
   
   **Please explain your rating:**
   Your text here…

2. **Technical quality** of the deliverable [1 (very low) - 6 (very high)]:
   (E.g.: Is the argumentation used in the deliverable sound? Does it evaluate the strengths and limitations of its contributions? Are its claims backed up?)
   
   **Please explain your rating:**
   Your text here...

3. **Presentation quality** of the deliverable [1 (very low) - 6 (very high)]:
   (E.g.: Is the deliverable well written? Is the deliverable organized in a logical fashion? Is the deliverable written in clear English? Is the readability good, average or poor? Are there any presentation problems?)
   
   **Please explain your rating:**
   Your text here…

4. **How original** is this deliverable? [1 (very low) - 6 (very high)]:
   (E.g.: Are the problems and approaches new? Does the deliverable go beyond the current state-of-the-art? Is this a novel combination of existing techniques?)
   
   **Please explain your rating:**
   Your text here…
Please Summarize the Strength & Weaknesses of the Deliverable:

My overall recommendation is
[ ] Definitely accept
[ ] Minor revisions required before accept
[ ] Major revisions required before accept
[ ] Definitely reject

Recommended minor revisions? (if any)
(You can use “track changes” and add your notes directly into the deliverable. Please indicate if you do so.)

Recommended major Revisions? (if any)
(In case of major revisions, the revised deliverable will be reviewed again and authors will be asked to provide a short summary of the performed revisions along with the revised deliverable.)

How confident are you in your appropriateness as a referee for this deliverable?
[ ] Very confident - I am an expert in this area.
[ ] Confident - I have a reasonable knowledge of this area.
[ ] Fairly confident - I have some knowledge of this area.
[ ] Not confident - I have no significant knowledge of this area.