# Merlin

## Partner User Guide

Merlin - Version 1.18

enterprise
europe
network

*Business Support on Your Doorstep*

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# 1. Introduction

## About Merlin

Merlin is the software tool that will assist you, as a member of the Enterprise Europe Network (EEN), in performing your daily activities related to the partnering and networking process. It offers the possibility to create, publish and promote profiles, events, EOIs, and Partnership Agreements, as well to join sector groups and communicate with other EEN colleagues in a single, user-friendly framework.

Merlin is made of three large components:

- The intranet
- The partnering tools
- The forums (there is a separate guide for this section)

The term Merlin is also often used to refer only to the partnering tools.

## About this guide

This document provides instructions for using the partnering functionality available in Merlin. The following features are covered:

Managing Profiles

- Profile creation
- Profile management (internal review, external review, edit and delete)

Disseminating Profiles

- Searching Profiles
- Client Management (Add and edit clients via intranet)
- Managing Queries (Create, edit and view queries and query types)

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## Accessing Merlin

To access Merlin for the first time, click the link in the email that was sent to you when your account was created and change your password.

For all subsequent log ins you can simply enter your username and password on the intranet homepage (http://een.ec.europa.eu/my) to sign in to Merlin. Once you have logged in from the intranet page, you are automatically logged into the forums and the partnering tools.

If you want to access Merlin from the EEN public website (http://een.ec.europa.eu), click **Members' corner** button in the top right corner of the page, then use your credentials to sign in.

## Merlin Logout

To logout of Merlin click the **Logout** button located in the top section of the page (the exact location of this button differs slightly depending on the section of the Members' corner you are browsing):

| Network | Forums | Partnering | Logout |
|---|---|---|---|
| Partnering Home | Events ▾    Profiles ▾ | Network ▾    User Guide | |
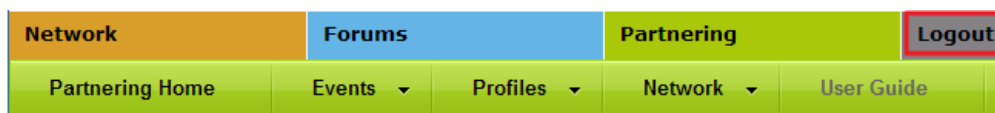
**Note:** Any unsaved work that you have open will not be saved when you log out. Please remember to save a draft of your work at regular intervals to ensure that you do not unintentionally lose your work.

**Expired session**

Your Merlin session expires after 20 minutes of inactivity. Five minutes before the session expires you will receive a notification. You can choose to continue your session or to log out. If yo do not respond at all, you will be logged out automatically.

## Browser Optimisation

Merlin is optimised to run on Google Chrome, Mozilla Firefox, and Internet Explorer versions which are used by more than 10% of the Network members. For information purposes, in Q4 2014, Merlin runs with full functionality on the following browsers:

- Google Chrome version 38
- Mozilla Firefox version 32
- Internet Explorer version 11

If you wish to know whether your browser version is still supported, please contact the EEN Support Team.

## What if I need help?

In order to make your transition to Merlin as easy as possible there is online help (an e-copy of the manual) and context sensitive help (specific help related to the page/field you are navigating) available to you for reference which can be accessed at any time from any page of the partnering tools as an accompaniment to the printed user guide.

- To access the context sensitive help click the ⑦ that is next to any field or title (where available). A pop-up window will open displaying information relating to the field you are navigating.

- To close the pop up window at any time, click ✖ , or press **Esc** on your keyboard.

- To access help relating to the page you are navigating, click **i HELP** in any dashboard.

- To access the main page of help, click **User Guide** available on most main pages in the partnering tools.

The help system is subject to ongoing development. With each new release, help for additional pages and fields will be accessible.

## Icon Legend

Below you will find a table with all icons you will find on the Merlin tools site and their meaning:

| Icon | Function | Where it appears |
|---|---|---|
| ⑦ | Access Help - Tool Tip Level | Next to fields that can be filled out in Merlin. For example, Create New Profile, Create Event etc. |
| i HELP | Access Help - Page Level | Within the Management Dashboards of Merlin. |
| User Guide | Access Help - Master Page | Next to the dropdown tabs of Merlin. Visible on all main Merlin web pages |
| ✎ | Edit | On multiple pages of Merlin. This icon allows you to edit items such as profiles, queries or user. |
| 🔍 | View Profile | On multiple pages of Merlin. This icon allows you to view further information about an item. |
| ➕ | Add New Query | Customer Management Dashboard. This icon allows you to add new queries for your clients. |
| 👥 | Roles | User Management Dashboard |

| Icon | Function | Where it appears |
|:---:|:---|:---|
| ✔ | Activate | User Management Dashboard |
| ⊘ | Deactivate | User Management Dashboard |
| ✖ | Delete | My Queries page |
| 📄 | Share | My Queries page |
| ➕ | Access Keyword Picker | Next to fields that require you to add keywords. For example, Create Event, Create Profile, Edit My User Profile, Create Query etc.<br><br>Clicking this button opens the keyword picker where you can choose keywords subject to their level. For further information please refer to How do I select keywords in Merlin?. |

## Navigating Merlin

Once you have logged in to the Member's corner, you have access to the latest information that is relevant for the Network (circular notes and news, link to find a contact in the Network). In addition, you have quick links to navigate to the Forums (if you have made your profile and personal data public) and the Partnering Tools, as well a **Home** button which takes to the EEN public website:

Once you click on **Partnering Tools** you will be directed to the Merlin Partnering home page. Click any of the green tabs to open a drop-down containing all of the functions available to you for that particular section.



Following is list of a tabs available to each user and their general function:

- **Partnering Home -** The Merlin home page. Click this button at any time while using Merlin to return to the home page.
- **Events -** All functions relating to events and event management (create, search, manage events, etc.).
- **Profiles** - All functions relating to profiles and associated items (create, review, search, disseminate profiles, manage clients and stakeholders, mange EOIs, manage achievements).
- **Network** - All functions relating to organisation and user management (for Partner administrators only), sector group membership management.

**Note:** Certain tabs and functions of the dashboard may not be available for some users of Merlin during general navigation. This is because certain tasks can only be completed by users who hold specific access rights (i.e. Profile Manager). To learn more about user rights please see Account Management section of the Merlin Partner User Guide.

## Exporting your Content

Some sections of Merlin (e.g Profiles and Events search) provide custom export functionality, which allows you to save content in a variety of formats, including PDF, XLS, and XML.

In addition, it is possible to export content from any Merlin page in PDF format, via your web browser's built-in **print function**, if your PC has a suitable PDF print driver installed (e.g. Adobe PDF).

## The Dashboards

Most functionality for Merlin is managed from a dashboard relating to a particular function. The dashboards are the main place where you will be able to monitor and manage your tasks. The layout of each dashboard is very similar across

the entire Merlin site. Below is an overview of a dashboard and general functionality visible on most pages of the Merlin site.



**Dashboard Key and Description:**

1.  Merlin tabs. Click each green tab to open a drop down showing different work tasks available to you. Click **Partnering Home** at any time to return to the Tools main dashboard. Click **Network** or **Forums** to navigate to the intranet or the forums, respectively. **Remember:** Save your work before navigating to different pages as unsaved work is not retained by the system.

2.  Titles (profiles, events, achievements, etc). These are clickable links that open an item's details. Depending on where your item is located in the dashboard, clicking on the title will open it in Edit mode (you can make changes on it) or View mode. Any text on the Merlin site that has a hyperlink (e.g. Show all) is clickable and offers different functionality.

3.  Page number. By default, each dashboard table is sorted by most recent profile/event first showing the 4 most recent matches. Click the page numbers to scroll through the pages of the table to show other profiles that may exist in your table.

4.  Show all. Click show all to open a new web page that shows all profiles/events for that particular table.

5.  Tool tip help. This icon is found across the entire Tools site. Click it to access help relating to a particular field or table.

6.  Logout. Click this button at any time to log out of Merlin. **Remember:** Save your work before logging out as unsaved work is not retained by the system.

7.  User Guide button. Click the user guide button to open a searchable version of the user guide in a new browser window. It is possible to download a PDF version of the User Guide from the window that opens by clicking '**Download the PDF Version**'

8.  Help button. Click this button to open help relating to the particular page you are navigating.

9.  Spyglass icon. Click to view details about an item (view mode only).

10. Filter button. Click to manage filters in order to sort the dashboard tables. To learn more about filtering information see Using the Filters.

## Using the Filters

Working with many profiles and clients can be difficult, especially when trying to locate a specific piece of information, such as a profile, at very short notice. The Merlin dashboards are laid out in a way that allows filtering of information to enable you to sort and locate the information you need quickly.

The following example shows how you would filter the **Profiles - Published** table on the **My Profiles Dashboard** to show only published profiles that are of the type 'Business Offer'. However, the principle is the **same** for filtering all other information shown in dashboard tables across the entire Merlin site.

1. From Partnering Home select **Profiles** > **My Profiles**. The My Profiles dashboard will open.
2. Scroll to the **Profiles - Published** table. It should look something like this:



The Profile Type column (First column in table) shows the type of profile (Business Offer, Business Request, Technology Offer, Technology Request, Research Development Request) that has been published.

3. To sort the table by Profile Type, click [filter icon] in the Profile Type column
4. The filter dropdown will open.



5. Enter the information you wish to filter for in the first blank field of the filter (In this example, type **Business Offer**) and select how the keywords should be filtered. You can choose to filter in the following ways **Is equal to**, **Is not**

**equal to**, **Starts with**, **Contains**, **Ends With** (In this example, select **Contains**):



The meaning of each filter type is shown here:

**Is equal to** - The value you apply in the keyword field (i.e. Business Offer) combined with this filter type will only show rows that contain exactly the same information as what is typed in the keyword field.
**Is not equal to** - The value you apply in the keyword field (i.e. Business Offer) combined with this filter type will only show rows that **does not** contain exactly the same information as what is typed in the keyword field.
**Starts with** - The value you apply in the keyword field (i.e. Business Offer) combined with this filter type will only show rows that start with the value you entered in the keyword field.
**Contains** - The value you apply in the keyword field (i.e. Business Offer) combined with this filter type will only show rows in the table that contain the keywords that have been typed in the keyword field.
**Ends with** - The value you apply in the keyword field (i.e. Business Offer) combined with this filter type will only show rows that end with the value you entered in the keyword field.

6.  Click **Filter.** The Profiles - Published table now only shows published profiles that are of **Business Offer** type. You will notice that the Filter icon has changed from ▼ to ▼ in order to show a column is filtered.

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**Note:** It is possible to apply multiple filters to different columns of a table if desired.

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## Clear Filters

To clear filters that you have applied to a dashboard table, do the following:

1. Select ⧩ in the column of the table that you applied a filter. The filter dropdown will open:



2. Select **Clear Filter**. All filters for that column of the table will be removed.

## Working with Technology, Market and NACE Keywords

Merlin has been created to utilize Market, Technology and NACE Keywords/codes. When you are creating a new profile, a new event or a new query you will be given the option to include these keywords to show particular specialism relating to the profile, event or query. This makes searching and grouping profiles and events by keywords a lot easier. Additionally, the client will be able to search using Keywords alone to ensure that they find highly detailed information relating to their needs very quickly.

Keywords in Merlin are split into levels: 'level 1, level 2 and level 3'. Level 1 keywords are the broadest level and encompass general business sectors such as Communications or Energy as defined by the EEN and Sector Groups. Level 3 is the deepest level and, consequently, contains the most specialist terms such as 'Message forwarding, queuing and answering systems, telephone management systems and PBXs (001002003)' or 'Protocol converters and emulators (001004004)'.

The following example shows the Market Keywords sector 'Communication' and how some of the relating keywords are broken down:
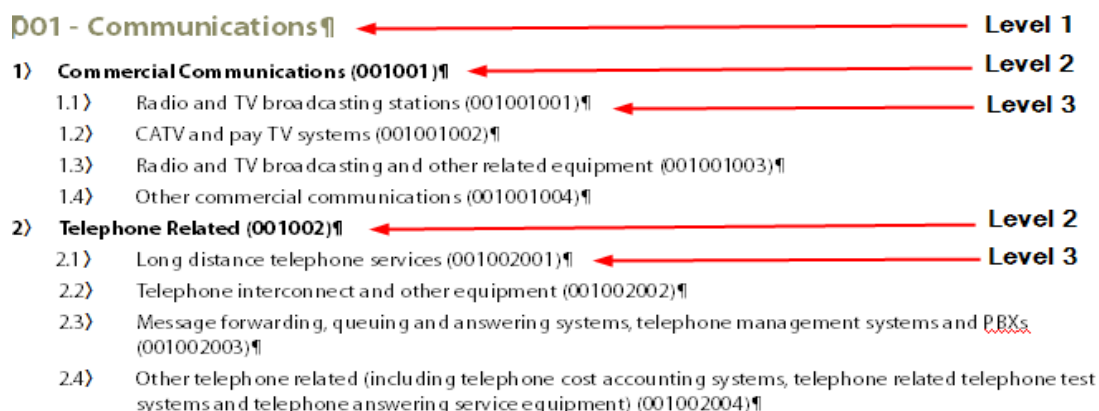


### When should I use different levels of keywords?

When working with all types of keywords it is very important to consider who will be searching the profiles and events and what consequences there would be for any clients that are searching profiles and events. A couple of important considerations are below:

- You can use only level 3 keywords when creating a new profile. This will provide the most detailed information to the person searching and reading the profile. The more specific information in a profile the better the profile and higher likelihood of securing a match. The same is applicable for creating events.

- Be aware that it is possible to search and create queries for profiles that contain level 1 keywords. **However,** if you create queries with level 1 keywords the client will receive a **very large number** of profiles by email that may not actually be related to their needs. Try to limit queries to level 3 keywords.

**How do I select keywords in Merlin?**

There are two ways of selecting keywords in Merlin.

- Simply typing a keyword in the field when requested. Merlin will predict the keyword based on what you are writing. You will then be able to select the keyword that matches your requirements by double clicking to select it.

- Click ➕ next to the keyword field will open the Keywords 'picker' box.
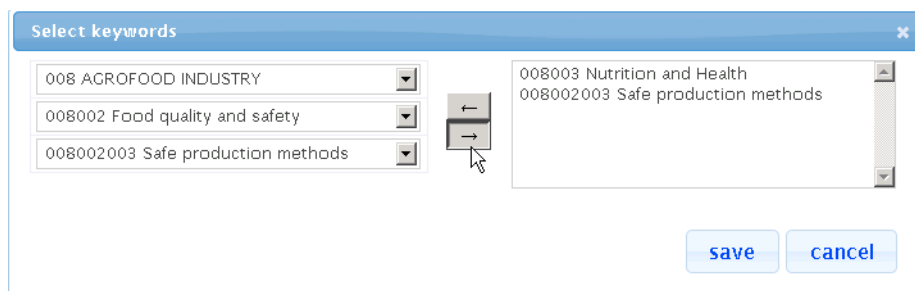


From here you should select the level 1 keywords, level 2 keywords and level 3 keywords as required. To add a keyword, select it in the left hand box and click  → . It will be added to the right box. To remove a keyword from the right box, select the keyword you wish to remove and click  ← . Once you are happy with your selection click **Save** to add the keywords to the field.

**Remember:** When creating a new profile or event it is only possible to select the lowest level keywords. This is because all profiles should be very detailed and contain very specific information. However, in future releases, it will be possible to create events using level 2 keywords, to allow partners to welcome a higher range of participants.

**Where can I find a current list of Technology, Market and NACE keywords?**

Currently (Q4 2013), all keywords are being reviewed and updated to reflect recent advances in technology and business. Some obsolete Market and Technology keywords have already been removed, while new keywords are being added to the list. This change impacts on the way you work with Merlin, namely: after December 2013 (Merlin release 1.4) you will no longer be able to create profiles and events using the obsolete keywords, however you can search and create queries for profiles and events published before Release 1.4 using such keywords. For a full list of existing keywords please see the relevant appendices of this user guide.

**Note:** The appendices of the user guide will be updated to reflect new keyword additions and deletions as soon as they have been confirmed by the Enterprise Europe Network.

## Who to Contact

Merlin has been created to allow its users as much autonomy as possible. A lot of features that, in the past, required you to contact the IT Helpdesk can now be done by you in Merlin i.e. reactivating your account/resetting your password.

If you have any access rights problems or you cannot see the correct tabs that you require to do your work in Merlin then you should contact your Partner Administrator who will be able to adjust your user rights.

If you have forgotten your password or you have not logged into Merlin for one month you will need to reactivate your account. To do this please see the Forgot My Password / Reactivate My Account section of the Merlin Partner User Guide.

## Feedback

We always appreciate feedback, suggestions for new features and ideas for improvement from our users. If there is something that you would like to suggest then please contact your champion who will compile the information and send it to the Agency. The Helpdesk cannot accept or action individual feedback from Partners.

If you find a bug or see errors on the site then you should contact the IT Helpdesk using the contact form found on the intranet: http://een.ec.europa.eu/my/intranet/contact

# 2. Change History

Below is an overview of the features and changes available in release 1.18 of Merlin, as well as a preview of future functionality.

## New features

- Expressions of Interest - Partners are now able to reject client EOIs using the IT platform.

## Changes that impact your work

- Expressions of Interest - the workflow for following up on EOIs received from local clients has changed: partners should now access the View EOI page, rather than the profile, to follow-up on an EOI. For further information please see the sections "Make an EOI as a Partner" and "Reject a Client EOI".

## Features under development

- Events - submitting participant feedback for events other than BE and CM
- PES 2015 - improvement and adjustment of the reporting module to fit the transition to the new network in 2015.
- Keyword list update - a new list will enter into effect in 2015.
- The user manual is being revised to reflect the current layout and functionalities of the Merlin website. Changes from one release to another are marked with change bars in the PDF version of the manual.

   Comments and suggestions for improvement are welcome and should be sent to the EEN IT Support team via the forms available on the intranet: http://een.ec.europa.eu/my/intranet/contact.

# 3. Managing Profiles

A profile is a cooperation request or offer. It summarises essential information about the nature of the offer or request, the customer and the expected cooperation. Published profiles are visible to anyone in the Network and are the key element in creating successful partnership agreements. All profiles are contained in the Partnering Opportunities Database (POD).

This chapter explains the procedures for creating, editing and publishing profiles in Merlin.

## Profile Workflow Overview

There are several steps involved in creating a new profile. It is essential that you enter the information according to the guidelines provided by the Agency in order to create a profile that successfully translates the clients needs and gives them the best opportunity for success in creating a partnering.

The following diagram gives a high-level view of the steps involved in creating and publishing a new profile:
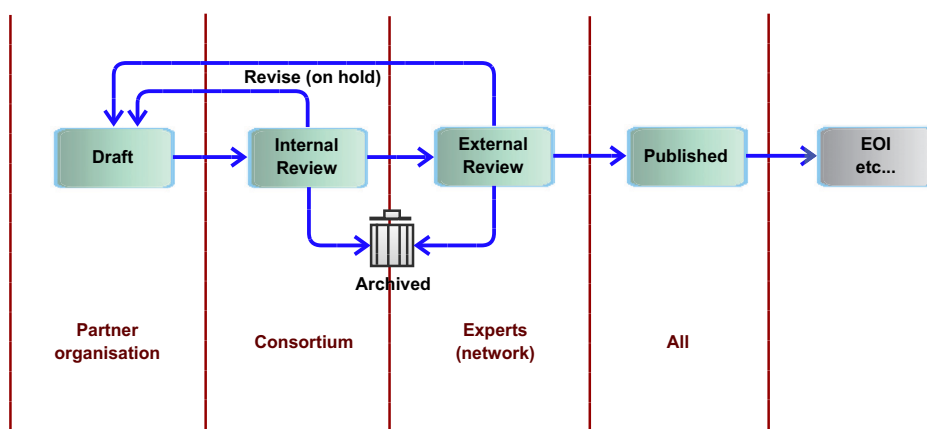


- Profile manager: a Network partner who is responsible for creating or updating the profile
- Internal reviewer: a colleague in the same consortium as the creator (but not the same user who created the profile)
- External reviewer: a Network colleague with solid experience in reviewing a particular type of profile.
- Agency Profile Validator: a person within the Agency who has the permission to review profile applications
- Network user: anyone in the Network who has access to the Merlin intranet
- System: Merlin application

Below is a brief overview of each of the steps.

**Profile creation**

The profile creator, after filling in the form for the desired profile type, has the following options:

- **Save** this enables the creator to make further changes on the profile.
- **Submit** for review: the profile is submitted to internal reviewers and the system changes its status to **Internal Review**. At this point, the profile can no longer be edited by its creator.
- **Cancel** to cancel any edits and return to the dashboard
- **Delete** to delete the profile (this cannot be undone)

To learn more about creating a profile as a profile, see "Create a new profile".

**Internal Review Process**

When a profile is submitted for internal review, it will be visible on the Merlin Dashboard under **Review Profiles** with the workflow status **To be reviewed by Internal Reviewer**. When one reviewer selects the profile for review from the internal review pool, the system blocks the profile from being reviewed by others. Internal reviewers are your colleagues from your organisation / consortium who have been given internal review rights by your Partner Administrator.

After internal review is complete, the reviewer has the following options which determine what happens to the profile:

- **Approve** the profile: the profile is then sent to the external reviewers for validation. The status of the profile is changed to **External Review.** At this point, the profile disappears from the internal reviewers' dashboard.
- **Revise**: The profile is sent back to the creator for updating with comments supplied for reference. The status is changed to **On Hold** in the reviewers dashboard, and **On hold from internal review** in the creator's dashboard. After the profile creator resubmits the profile, the system changes its status back to **Internal Review.** The profile will be placed back into the internal review pool which means it can be reviewed again by **any** internal reviewers within your network.
- **Delete** or **Reject** the profile: the profile is archived by the system.

To learn how to conduct an internal review, see "Review a profile"

**External Review Process**

Once the profile is approved by an internal reviewer, the profile will enter into the external reviewer pool. External reviewers can access the external review dashboard and select profiles to review that fit their experience and chosen profile category (when registering to be an external reviewer, the user must provide an outline of their expertise and choose at least one category from Technology/Business/Research which determines the type of profiles they will be able to review). Reviewers will not be able to see any contact details relating to the profile creator or profiles created by themselves and their own consortium.

The profiles will remain in the external review dashboard for 7 calendar days during which 2 external reviewers must agree to conduct review. Once two reviewers have accepted to review the profile, the system will immediately remove the ability for all other reviewers to review the profile.

**Note:** If only one person agrees to review the profile in this time the Agency Profile Validator will act as the second reviewer. If no one agrees to review the profile in this time then the Agency will act as both reviewers.

The profile, once reviewed, will move from the "External review" dashboard to the "My Reviewed Profiles", thus enabling the user who has performed the external review to track the progress of the profile.

Each member of the reviewing panel will be given four questions which they must answer with a score from 1 to 5 to rate the profile.

The four questions the external reviewer must answer are:

- Clarity, coherence and understanding
- Advantages and Innovative Aspects

- Guidelines and Linguistic Accuracy
- Cooperation Expectations

Their scores will be averaged and the final score will dictate what will happen to the profile before it is published:

| Profile Rating | Final Mean Score of the Two Reviewers/ 20 | Next Step |
|---|---|---|
| **A:** Excellent | 17.5 - 20 | The profile is **published**. |
| **B:** Good | 13.5 - 17.4 | |
| **C:** Sufficient | 9.5 -13.4 | |
| **D:** Rather poor | 4.5 - 9.4 | The profile is put **on hold:** the system notifies the creator that the profile needs to be revised and changes the status of the profile to **On hold from external review** in the creator's dashboard. Comments from the external reviewer will go to the creator of the draft and the internal reviewer will be informed.<br><br>Once the creator updates the profile and resubmits it, the external review phase will restart with the same external reviewers who conducted the firs external review. This reviewing loop will continue until the profile receives a score that is high enough for it to be published. |
| **E:** Insufficient | 0 - 4.4 | The profile is **rejected** and archived. |

Once the profile is published, it is available for dissemination. The profile will be available online for one year (except for RDR profiles whose lifespan is determined during profile creation at the Deadline for Call).

To apply to become an external reviewer please see "Change your external reviewer status" and to learn how to conduct an external review please see "Review a profile"

## Blocking Scores

A blocking score when reviewing a profile is 0. This means that if an external reviewer is reviewing the profile and they deem there to be a blocking issue (i.e. major spelling errors / typos) then they would give the score of 0 to the most relevant of the four questions that they must answer when completing the review process.

If the two external reviewers give a score of 0 for one of the four questions then the profile will be passed back to the profile creator to be edited and resubmitted to review.

If one external reviewer gives a score of 0 for one of the four questions and the second reviewer **does not** then the profile will be sent to be reviewed by the Agency Profile Validator because the External Reviewers did not have the same opinion.

This rule applies to all four of the questions that must be answered during the External Review process.

## Profile expiry date

The system will notify the profile creator two weeks before the expiry date (one year) of the profile. This is an automatic function to ensure that all active profiles are up to date and provide accurate information to the Network. On the expiry date, the profile is unpublished and its status is changed to *To be modified*; the profile creator has the following options:

- **Revise** the profile and resubmit it for review. The profile will go through the entire validation process again.
- **Delete** the profile: the profile is removed from the partner's dashboards.

## My Profiles Dashboard

It is possible to check the status of all profiles that you/your organisation creates from the **My Profiles Dashboard.**

From here it is possible to see profiles that are undergoing the following stages of creation:

- **Profiles - Draft**: profiles which have being created but have been saved before submission to reviewers.
- **Profiles - To be Modified**: profiles which have been updated but are awaiting approval for the updates.
- **Profiles - Under Review**: profiles which are going through the Internal and External Review stages.
- **Profiles - Published**: profiles which have passed review stage and been published. Published profiles can be subject to search.
- **Profiles - Archived and Rejected**: profiles which have been archived by the owner or, rejected during review. These profiles are only kept in your dashboard for reference purposes.
- **Expires in Two Weeks or Less**: profiles which are due to expire in the next two weeks. These profiles can be updated and republished, or archived.
  **Note**: In the current implementation you receive a notification to update your profile two weeks before expiration, but you profile does not expire - it remains published in the POD and therefore visible to partners and clients. In future releases, the implementation will be changed so that if no action is taken on the expiring profile, it will be archived automatically by the system on the expiration date. Nevertheless, with Release 1.12 (October 2014) your profiles that have reached their expiration date (even though they remain published), will be shown in the new My Expired Profiles Dashboard.
- **My Reviewed Profiles**: profiles which you, as an external reviewer, have already reviewed.

**Note:** For each of the profiles owned by your organisation, all the received EOIs are listed at the bottom of the profile details page. Click on the icon next to each EOI to open it. The EOI will open in a new window and, where applicable, you can follow-up on it. Please refer to the Managing Expressions of Interest chapter for further details on EOIs.

To access the **My Profiles Dashboard** in Merlin, navigate to **Profiles** > **General** > **My Profiles.** The My Profiles Dashboard will open:

## Create a new profile

A well written profile will generate greater interest from individuals and organisations with regards to potential exchange of skills, services or technologies. In addition, it will reflect upon the quality of your work and of the Network.

Here are a few things to consider when writing a profile:

- Before you start, decide whether you should create a profile or rather simply send existing profiles to your client.
- Make sure you have all the necessary information about the company or individual and their business requirements however be sure that you **never** refer to the client, brand or products by name in the profile or attached images. The profile should be written so that your client cannot be identified.
- Write with the reader in mind: the summary should be understood by other Network partners so they can target relevant companies in their region. The full description should provide sufficient technical details to attract potential partners for your client but not be too technical so that potential clients are deterred.
- Take your time writing the summary and title: these are the first thing potential partners or your client will see and, as a result, is one of the most important aspects of the profile.
- Try to stick to using short sentences; Stick to one sentence, one concept.
- Avoid jargon and ensure that all acronyms used are fully described so the average reader will be able to understand.
- Do not repeat information across the profile. There are sufficient fields where you can accurately describe the offer/request.
- Ask the client to approve the final version of your profile.
- Read your profile before submitting it to internal reviewers: make sure it is accurate, clear, concise and readable.
- Ensure that the profile is of a high standard of English with no typos, punctuation or grammar errors.

Additionally, to assist you in writing your profile it is recommended that you follow the *Merlin Business Guidelines* and *Merlin Review Checklists.* This will give you an idea of how your profile will be reviewed in order to ensure a consistently high level of profiles are published to the network.

To create a profile, do the following:

1.  From Partnering Home, select **Profiles** tab, then **Create New...**.
2.  Select the profile type you want to create from the list.

    There are several types of profiles:

Sometimes it may be difficult to distinguish between whether to create an offer or a request especially with regards to distribution agreements.

A good 'rule of thumb' is to ask the question: Which way is the money going to flow?

- **If your client has to pay** to get what he is looking for, it is probably a Business Request.
- **If your client is going to receive money or financial gain** from the partner he looks for, it is probably a Business Offer.

Example:

**Business Offer**: Your client would like to extend their services into another country of the EEN. They have a service or product that they would like to offer in order to gain a foothold within the new region.

**Business Request**: Your client is looking for a like minded company within the EEN that supplies a particular product or service in order to complete their product range and/or distribute the product/service in its own country.

3.  The Create Profile form contains different tabs dependent on the type of profile created: *Details*, *Dissemination*, *Client*, *Call, Partner Sought*, *Attachments*, and *Review*. Go through each of the tabs carefully and enter the necessary information in each field. In the *Review* tab in particular, include comments, if necessary, for your colleagues who will review the profile. However, the comments should not contain any duplicate information or details that should belong in other fields of the profile.

For reference, it is recommended that you refer to the *Merlin Business Guidelines* while you are populating the fields of the profile. This will help ensure that profiles are of a consistently high standard across the EEN.

.



**Note:** Mandatory fields are marked with an asterisk (*). These fields may differ depending on the type of profile you choose to create.

In addition, the data in certain fields must comply with specific rules. For instance, the *Year established* field must contain only numbers; also, certain fields have a character number limit. Please note that spaces and punctuation marks each count for one character.

All the tabs will be highlighted in green if everything in the form is correctly filled. A red tab indicates that one or more fields are not filled out or are filled out with invalid data.

**Note:** When adding keywords you can click the ![+] icon to open the keyword picker. From the keyword picker you can add lowest level keywords by viewing and selecting keywords from the tree view. For further information please see "Working with Technology, Market and NACE Keywords" section of this user guide.

The list of technology and market keywords was revised and updated in December 2013 to reflect recent advances in technology and business. Some obsolete Market and Technology keywords were removed, while new keywords were added to the list. Therefore, after Merlin release 1.4 Network partners are no longer able to select the obsolete keywords whilst creating profiles. Partners can, however, search for profiles published before Release 1.4 using such keywords. For a full list of existing keywords please see the Appendices A and B of this user guide.

4. At the bottom of the profile, click **Save and continue** to save a draft version of the profile and continue working (the draft will be stored in your My Profiles Dashboard), click **Submit Profile to Review** to send the profile for internal review or **Back** to cancel the profile and return to the dashboard without saving.

• If all the information in your form is correct and you click **Submit**, the profile will be submitted to internal reviewers.

- If one or more of your tabs are not validated (in red), you will receive a notification to correct the errors in the form. Correct the errors and re-submit.

## Review a profile

Profiles that are undergoing the various stages of review are shown in the review dashboard. From here it is possible to manage all aspects of reviewing profiles, such as profile approval, profile rejection and profile revision.

**Note:** Reviewing profiles can only be done by users who have been assigned as reviewers.

Please contact your Profile Administrator to establish if you have the correct rights to complete Internal Review. Furthermore, if you have sufficient experience in a particular industry and fulfil the criteria set out by the Agency then you can register to become an External Reviewer. To learn how to do this see "Change your external reviewer status".



**Conduct Internal Review of a Profile**

**Note:** The following review process can only be done if you are registered as an internal reviewer. If you are unsure whether you have Internal Reviewer rights then please contact your Partner Administrator who will be able to assign you the correct role.

**Note:** For further information about the Internal Review process please see "Internal Review Process" section of the *Merlin Partner User Guide*.

If you are registered as an internal reviewer, do the following to conduct an internal review of a profile:

1. From Partnering Home click **Profiles**, click **Review Profiles.** The Review dashboard will open displaying all profiles available for you to review in the internal review table.

**Note:** In this table you will **not** see profiles pending internal review that you have created yourself. You will only see profiles for review that were created by your colleagues in your organisation and/or consortium.

2. Click the title of the profile that you would like to review in the internal review window. The profile will open in Edit mode.

3. Review the profile by scrolling through the five profile tabs.

**Note:** It is recommended that you refer to the *Merlin Business Guidelines* and *Merlin External Review Checklists* while reviewing the profile to ensure that it conforms to the expected standards for publishing to the network.

The more attention you pay to catching errors and editing lots of common mistakes during internal review process, the less time the external review process will take meaning the profiles will be released to the network sooner.

4. When you have finished reviewing, click the **Review** tab.

5. Based on your opinions of the profile, click **Approve** to approve the profile and send it automatically to the external reviewer, **Revise** to return the profile to the creator for edit, **Reject** to reject the profile, **Cancel** to return to the Review Profiles dashboard without saving or **Delete** to delete the profile.

   Remember it is **mandatory** to leave a comment to show the reasons for accepting, revising or rejecting a profile.
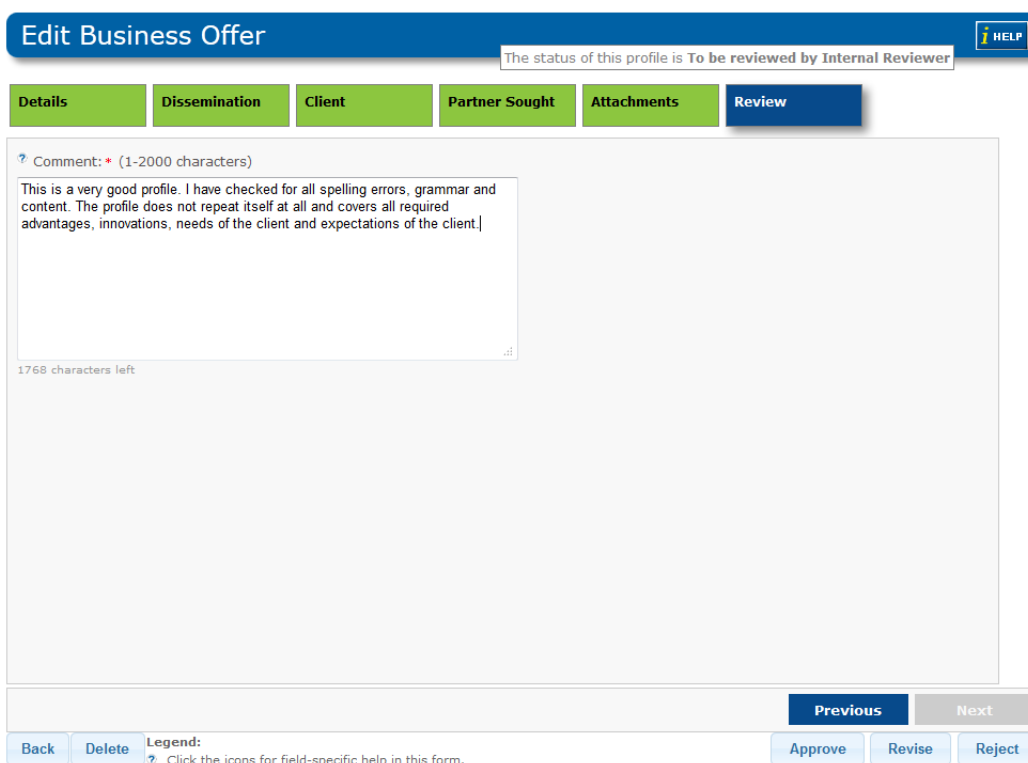


Once the profile has been **Approved** at internal review stage it will be passed into the external reviewer pool for review.

**Conduct External Review of a Profile**

**Note:** The following review process can only be done if you are registered as an external reviewer. If you are interested in becoming an external reviewer please see "Change your external reviewer status" to learn how to apply.

For further information about the External Review process please see "External Review Process" section of the *Merlin Partner User Guide*.

If you are registered as an external reviewer, do the following to conduct an external review of a profile:

1.  From Partnering Home click **Profiles**, then **Review Profiles.** The Review dashboard will open, displaying all profiles available for you to review in the External Review table. The list is limited to the profile categories you registered to review (Business / Technology / Research).

---

**Note:** Profiles displayed in the external review table will change as other reviewers accept to review profiles. Each profile will remain in the table until two external reviewers have accepted to review a profile.

If only one person accepts to review a profile within a **7 calendar-day limit**, then the profile is automatically escalated to the Agency Profile Validator, in which case the first external reviewer's score is not taken into account. If no reviewers accept to review a profile within the 7-day limit then the profile will be reviewed by the Agency Profile Validator.

---

In order to accelerate the external review process, the profiles in this table have the waiting time (i.e. the number of days that have passed since the profile was submitted for external review) displayed, and are also flagged with different colours:

- No flag - these profiles have been awaiting review for less than 7 calendar days, with no action from any reviewer.

- Yellow flag ▢ - one external reviewer has already joined to review / reviewed this profile;

- Red flag ▮ - this profile has been awaiting review for more than 7 days, with no action from any reviewer.

2.  Click the profile title you wish to review in the external review window. The profile details page will open.

3.  Click **I will review this profile** at the bottom of the profile details page to accept that you will undertake the review of the profile, alternatively click **Back**. When you agree to review the profile, it will open in **Edit mode** and you will see an extra **Review tab** has appeared next to the other profile tabs.

    **Important:** Once you click **I will review this profile** you are obliged to complete the review process **within 7 calendar days,** therefore please be completely certain that you are prepared to complete the review within this time or the profile will be sent to the Agency Profile Validator.

4.  Review the profile by scrolling through the profile and reviewing all information in the fields. If necessary, correct text in the title and summary fields, but ensure that the changes are notified to the profile author.

    **Remember:** Always refer to the *Merlin Business Guidelines* and *Merlin External Review Checklists* to ensure that the profile conforms to the expected standard for publishing to the network.

5.  Once you have completed review, scroll to the comments section at the bottom of the profile:



6.  Answer each of the four questions in the list as honestly as possible. You can score each question from 0 (blocking) to five (excellent).

---

**Note:** The 0 indicates that the profile has an issue that is deemed to block the profile from being published. If the second external reviewer also gives a 0 to a question then the profile will be sent back to the profile creator for edit and resubmission to review. If the second external review does not score the question 0 then the profile will be sent to the Agency Profile Validator for final review and decision as the external reviewers were deemed not to have agreed on the scoring.

---

7. In the **Last Comment** field provide any supporting comments and feedback regarding the quality of the profile and your recommendations. Please be as detailed as possible with your comments as they will assist the profile creator should they have to re-edit and re-submit the profile for review. Please note that your comments will be **anonymous**; The profile creator will not know that you reviewed the profile.

8. Click **Submit Score**. You will be returned to the **Review Profiles** dashboard where the profile will no longer be visible to you. However, you can track the state of the profile in the My Reviewed Profiles dashboard.
The total score that you and the second external reviewer provides will be averaged and will determine if the profile is **published**, **put on hold** or **rejected**.

---

**Note:** You have 7 calendar days to complete your review so if you click **Back** without submitting a score you can re-access the profile at a better time and complete the review. You can do this by navigating to the **Review Dashboard** and selecting the profile.

---

### Edit a Draft profile

There may be instances where you have decided to save a half created profile without submitting it for review so you can return to it and complete the draft process at a later date.

Profiles in draft status can be found in the **Profiles - Draft** section of your My Profiles dashboard.

To edit an existing draft profile, do the following:

1. Under **Profiles**, click **My Profiles**. The My Profiles Dashboard will open.



2. In the **Profiles - Draft** table, click the profile title you wish to edit. The profile will open.
3. Make the necessary changes and click **Save** to update the draft version of the profile, or click **Submit** to send the profile for internal review. Clicking **Cancel** will return you to the My Profiles Dashboard without saving.

## My Expired Profiles Dashboard

This dashboard displays all the profiles made by your organisation which have currently reached or passed their expiration date, regardless of their status at the moment of expiration (draft, under review, published, etc.). This includes

profiles which have been migrated with a certain status and profiles created in Merlin that may have expired for various reasons.

---

**Note:** Currently, due to the technical implementation of the expiration workflow, published profiles that reach their expiration date are not transferred to the *To be modified* table of the *My Profiles Dashboard*; instead they remain published in the POD and therefore visible to partners and clients. However, based on their expiration date, they will be shown in your *Expired Profiles Dashboard*.

---



Click on a profile title to see its details. **For published profiles**, you have the options to export, delete, archive, update the content or extend the deadline.

For more information about extending the deadline of a profile, please refer to the "Modifying profile deadlines" section.

## Modifying profile deadlines

In Merlin, the default validity period for a profile is 1 year from its publication date. As of October 2014 EEN partners having Profile Manager permissions can extend or shorten the validity period of their published profiles or profiles that have been expired for less than a year, provided the profiles do not require modifications and the clients behind the profiles have given their consent.

**Deadline extension rules**:

- The profile must be currently published or must have expired less than a year ago.
- The deadline for a published profile can be extended at the earliest 30 days before its expiry.
- The deadline can be extended up to two times and for a maximum period of 180 days each time (2x180 days). If you wish to make your profile available for a longer period, you need to update it (using the *Update this profile* option on the profile details page) and resubmit it for validation to internal and external reviewers. Thus, you can choose to publish your profile for up to 365 days at once.
- The extension is calculated based on the expiration date.
- Once the deadline is extended, the profile will revert to the status it had upon expiration: published profiles will be published again in the POD without undergoing any validation; profiles that were on hold will remain on hold after the deadline extension.

To change the deadline of a profile:

1. Go to **My Profiles Dashboard** (Partnering >Profiles >My Profiles) and locate the profile for which you wish to extend the deadline, then click on the profile title to open it. Your profile can be located in one of the following tables: *Published*, *To be modified*, *Expires in two weeks or less*.
   **OR**
   Go to **My Expired Profiles Dashboard** (Partnering >Profiles >My Expired Profiles) and locate the expired profile for which you wish to extend the deadline, then click on the profile title to open it.

2. The expiration date is indicated in the upper right corner of the profile:



3. Click the **Modify Deadline** button. The **Modify Deadline** dialog will open:



4. Select a the new expiration date. You can choose any date up to 180 days after the current expiration date. Alternatively, to shorten the publication period of a published profile, select any date between today and the current expiration date.

5. Provide a reason for extending the deadline of the profile (mandatory).

6. In the **Check List** section, check all the boxes to confirm that:
   a) the profile can be published as such, without requiring any content updates; and
   b) you have contacted your client and obtained their consent to extend the deadline; and
   c) your client is still interested in having their profile published in POD.

7. Click **Modify.** You will receive a confirmation message, and the new expiration date will be shown in the upper right corner of the profile, while your comment, and the extension report kept by the system are displayed at the bottom of the page.



### Delete a profile

Profile managers can delete any of their profiles as long as such profiles have not been published (e.g. draft, to be modified, rejected profiles), as well as archived profiles (this includes previously published profiles which expired and which have been archived by the manager).

Profiles can only be deleted one by one. To delete a profile:

1. Locate the profile that you wish to delete. It can be found in the **My Profiles** dashboard or in the **My Expired Profiles** dashboard.

2. Click on the profile to open it, then click the **Delete** button at the top of the profile details page.

3. In the dialog that opens, choose a reason for deleting it and click **Delete**.



**Note:** Deleted profiles disappear from your dashboards, therefore cannot be accessed any longer. If you have deleted a profile by mistake, please contact the EEN Support Team, who can retrieve it for you.

### Archive a profile

Profile managers have the option to archive profiles which have been published at least once: this includes expired profiles, currently published profiles which they deem no longer relevant (e.g. a match was found for the profiles, etc.), as well as published profiles that have been modified and returned to the owner requiring additional changes. Archiving profiles allows partners to withdraw them from the partnering process, while keeping them in the POD for historical references.

To a profile:

1. Under **Profiles**, click **My Profiles** and scroll down to either the *Published* or the *Expires in two weeks or less* table.
   OR
   Under **Profiles**, click **My Expired Profiles.**

2. Locate the profile you wish to archive and open it. The View Profile window will open.

3. The profile details window will open. Click the **Archive** button at the top of the page.

4. The system will require confirmation. Click **OK** to archive the profile. The profile will disappear from its original table and you will find it in the **Profiles - Archived and Rejected** table of the profiles dashboard.

**Note:** Archived profiles cannot be republished. If you have archived a profile by mistake and you would like to reuse it, please contact the EEN Support Team, who can retrieve the profile and set it back to draft for you.

## Change your external reviewer status

If you have expertise in a particular business area and you fulfil the selection criteria set out by the Agency, you can nominate yourself to be an external reviewer. To do so, do the following:

1. From Partnering Home scroll over **Network Management > External Reviewer** and click **My Status.** The review status window will open showing your current reviewer status:



2. Click **Become an external reviewer** to nominate yourself as an external reviewer. A new window will open where you should provide an outline of your experience and select the types of profile you would be prepared to review. The Profile types are Technology (for those wanting to review Technology Offers/Technology Requests), Business (for

those wanting to review Business Offers/Business Requests) and Research (for those wanting to review Research Development Requests):



3.  Click **Submit** to submit your application or **Back** to return to the Dashboard. Your application will automatically be directed to the Agency Validation Manager who reviews and approves external reviewer requests.

    You can monitor your status at anytime by returning to the **My Status** screen on the Dashboard (**Network Management > External Reviewer).**

## Update your external reviewer information

Once you have been approved as an external reviewer it is possible to update your external reviewer information at any time.

The process **will** need to go through review and sign off again by the Agency Validator.
To update your external reviewer information:

1.  From Partnering Home scroll over **Network Management > External Reviewer** and click **My Status.** The review status window will open showing your current reviewer status:

**2.** Select **Update my external reviewer profile**. The Edit external reviewer window will open:



**3.** Make your edits as required. Click **Submit** to submit the edits for review or **Back** to return to the My Status screen without saving your edits.

Your updated information will automatically be directed to the Agency Validator who will review and approve or reject (with comments) your edits. You can monitor the status of your updated external reviewer profile by returning to the **My Status** window at any time (See point 1 above). If the status is still pending approval you will see **Pending**. If the edits have been accepted your status will be **Approved** and you will be able to conduct reviews.

## Resign as an external reviewer

To resign as an external reviewer, do the following:

**1.** From Partnering Home scroll over **Network Management > External Reviewer** and click **My Status.** The review status window will open showing your current reviewer status:



**2.** Select **Resign**.

Your request will be sent to the Agency Validation Manager for approval. You will be able to see your status in the **My Status** window will have changed from Approved to Pending for Deactivation. Once deactivated your status will show as Archived.

**Note:** An external reviewer profile that has been archived can always be reactivated in future by registering to be an external reviewer again.

## Reassign Profiles

If you are a Profile Manager you may wish to reassign some or all of your published profiles to another Partner user in the Enterprise Europe Network.

To reassign some or all profiles associated to you do the following:

1.  From the Partnering Tools dashboard navigate to **Profiles > Reassign Profiles.** The Reassign all your profiles window will open:



2.  Hold Ctrl and manually select the profiles you would like to reassign (or click **Select All** to select all profiles).
3.  Select the country of the organisation that you want to reassign the profiles to.
4.  Select the relevant organisation within that country.
5.  Select the contact person for that organisation to whom you would like to reassign the profiles.
6.  Click **Save** to save your edits.
7.  If a pop up opens asking you to confirm your changes click **OK** to confirm your request. The profiles will be reassigned to the person you have specified.

**Note:** Please note that this process is irreversible. Once you have reassigned the profiles they will be managed by contact person you have specified.

# 4. Disseminating Profiles

Profiles can be searched either on the intranet (only by partners and agency staff who are logged into Merlin) or on the internet (by anonymous and subscribed users) via an embedded widget that is placed within the website of a local network.

## Profile Search - Intranet

Partners and agency staff can search profiles directly from the Merlin dashboard in order to find profiles that suit their clients needs and create expressions of interest on their behalf.

From the Merlin dashboard there are two types of search available, Simple search and Advanced search (to narrow down search results).

If your search yields positive results you can create an expression of interest which will be sent directly to the Network Partner behind the profile. This is all managed directly through your dashboard.

To access the Intranet profile search function for Merlin, select **Profiles** > **Profile Search** from the Merlin Dashboard.

**Intranet Simple Search**

To search for profiles using the simple search form, do the following:

1. From Partnering Home click **Profiles** > **Profile Search** and click **Simple Search.** The Profiles Simple Search window will open.



2. Enter as many search terms as you require to conduct the search in the **Search** field.
3. Click either **Any word** or **All words** to determine if the search results will only show profiles that contain **all words** you specify or **any words** (one or more words you specify) in the profile.
4. Select the **Profile Type(s)** you wish to search. You can select one or more of the following: Business Offer, Business Request, Technology Offer, Technology Request, Research Development Request.
5. Indicate the **Profile Country of Origin.** By indicating a country/any countries in this field will produce search results only containing profiles that were created in the country(ies) you specify. You can multiple select the countries by holding **Ctrl** and selecting from the list.

**Note:** The **Profile Country of Origin** field will **not** take into consideration where the profiles in the profile results are looking for partnering opportunities. To find profiles that are looking for partnering opportunities in a particular country (i.e. your country) then please see step 6.

6. In the **Client Requested** field indicate the countries that the profile creator is looking for partnering opportunities. You can multiple select the countries by holding **Ctrl** and selecting from the list.

7. In the **Profile focus** and **Client activities** sections specify any technology, market and NACE keywords that you want the profiles to contain. For a full list of all NACE, Market and Technology keywords please refer to the relevant Appendices section of this guide.

8. Click **Search.** The system will display the profiles matching your criteria in a list.



9. Adapt your search to show profiles that have been recently modified by clicking the '**Last modified**' buttons on the left hand side of the results page.

10. Once you have located a profile that is suitable, click the profile title to view it in greater detail. The Profile View will open. From this page you will be able to click **Create an Expression of Interest** to create an EOI for the profile or alternatively click **Back** to return to the search results. If the profile is closed for EOIs, it will bear the mention

    Closed for EOIs   both in the search results and in the profile details form.

**Intranet Advanced Search**

To search for profiles using the advanced search form, do the following:

1.  From Partnering Home navigate to **Profiles** > **Profile Search** > **Advanced Search.** The Profiles Advanced Search window will open.



2.  In the Profile Details tab you can:

    -   Enter as many keywords as you require to conduct the search in the **Free text search** field.

    -   Indicate whether you wish your free text search to show profiles that contain **All Words** or **Any Word** (One or more of the keywords you define in the free text search field.

    -   Enter the **POD reference** number of a profile, if known.

    -   Type the stage of development for the profile. You can select from the following:

    -   Indicate the **IPR Status** (intellectual property rights) of the profile. You can select from the following:

    -   Indicate a date range for when the profile was published, last updated or expired. To do so click `...` and select a date from the calendar that opens.

3.  From the **Profile Types** tab you can select the types of profiles you would like to search by marking the check boxes.

4.  In the **Partners** tab you can choose to search for profiles by Partner Organisation and/or Consortium and define the Sector groups that the profile may be related to.

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**Note:** When choosing to search by consortium please type the country where the consortium exists to see a full list of consortia for that country.

---

5.  In the **Keywords** tab you can specify the technology and market keywords that you want the profiles to contain. The more detailed the keywords the better likelihood of a good business match. For a full list of Market and Technology keywords please refer to the relevant Appendices of this guide. Click `+` to open the Keyword picker to choose keywords from a tree view format. To learn more about this please see How do I select keywords in Merlin? section of the *Merlin Partner User Guide*.

---

**Note:** If you do not select any keywords, the system will ignore the keywords and will perform the search based on the other criteria you specified.

---

6.  In the **Client** tab choose the type and size of the client (to select multiple fields, hold down **Ctrl** on your keyboard and click as many fields as required) and specify the NACE codes related to the client activity, which you would like the profiles to contain. For a full list of NACE codes, see Appendix C of this user guide.

7.  In the **Partnership considered** tab select the type of partnership wanted by the clients behind the profiles you are searching for. To select multiple fields, hold down **Ctrl** on your keyboard and click as many fields as required.

8.  In the **Country and Language** tab you can:

    -   Indicate the country where the profile originates.

    -   Choose the target country for the profile. By default, no preference is selected, meaning that you will receive profiles from all countries (even though they may not be requesting partnering in your particular country.) If you wish to only view profiles that are targeting your country click '**I want to receive profiles targeting my country**'

or alternatively if you wish to see profiles targeting another country click '**Restrict query results to specific countries'** and type the country(ies) you wish to target.

- Choose the languages spoken by the client looking for partnering.

9. From the tab next to the Search button, choose whether you want the search results to be displayed as a compact or detailed view.

10. Click **Search** to run the search and view the profiles matching your criteria or **Save as Query** to save your search as a query.

Detailed view:



Compact view:



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**Note:** When you click **Save as Query** the save query dialog will open asking you to give the query a name and provide a short description of the query. You can also indicate how often you would like to receive emails for the query containing profile results for the search you have created. Once you have added all information, click **Save** to save the query or **Cancel** to return to the search window. To learn more about Queries please see the Managing Queries of the *Merlin Partner User Guide*.

**11.** You can sort your results by expiration date in ascending or descending order, using the **Sorting options** box on the left hand side of the results page.

**12.** Once you have located a profile that is suitable, click the profile title to view it in greater detail. The Profile View will open. From this page you will be able to click **Create an Expression of Interest** to create an EOI for the profile or alternatively click **Back** to return to the search results. If the profile is closed for EOIs, it will bear the mention

Closed for EOIs  both in the search results and in the profile details form

## Profile Search - Internet

Anonymous and subscribed clients can search profiles via the internet, most often via partner sites that have the Merlin search window embedded into their site. To learn more about this see Embedding Merlin to your site

From this window clients can conduct a Simple search or Advanced search (to narrow down the search results).

If the search results yield positive results the client or anonymous user can then create an expression of interest for the profile. You will be notified that an anonymous user or subscribed client has created an expression of interest for a profile in your network and the partnering process will begin.

To learn how a client would conduct a Simple or Advanced search see *Merlin Client User Guide.*

## Export Profiles

It is possible to export profiles and events to the following formats:.PDF, .docx (word document files), .xlsx (Excel documents), and xml (Extensible Markup Language) to enable you to disseminate hard copies of profiles and events as handouts to attendees of conferences, training and marketing events that you may be involved in.

To learn how to export Events please see Exporting Events section of *Merlin Partner User Guide.*

There are two types of profile export possible:

- Export Single Profile (from the Profile Details page of a profile. You will export the profile in one file.)
- Export All Profiles (from the search results page. You will export all your profile results in one file.)

The main difference between the two types of export, not including the amount of profiles you export, is that when you export all profiles you must assign the contact details to a person in your organisation (either yourself or another user).

### Export a Single Profile

To export a single profile, do the following:

**1.** Search for your profiles using the filters and criteria that you select. To learn how to search profiles please see the Profile Search - Intranet section of the *Merlin Partner User Guide.*

2. Once your search has brought up a profile that you wish to export, click on the profile to open the Profile Details page.

3. Click **Export.** The Export Results window will open:

4. Select the format that you wish to complete the export (pdf, xlsx, docx, xml).

5. If necessary, indicate who the **default client contact** will be for the profile (if it is not going to be you)

6. Select the fields that you wish to export or select **All** to export all fields for each profile.

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**Note:** If you only select a few fields to be exported then these are **all** that will be exported for each profile.

---

7. Click **Submit** to start the export or **Cancel** to cancel your changes and return to the Profile Details page.

8. When prompted click '**Please click here to download the file**' or press **Cancel** to cancel your changes and return to the Profile Details page. A pop up will open asking what you would like to do with the file:
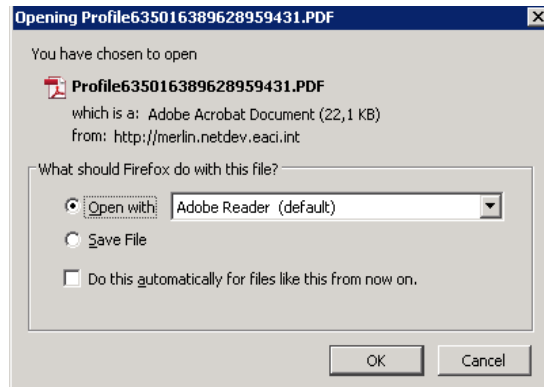


9. Select **Open with** and choose the program you would like to immediately open the file or **Save File** to save the file to your computer.

10. Click **OK.** The file will download and automatically open in the format that you requested. If you selected to save file in step 9, then the file will download to the downloads folder of your computer.
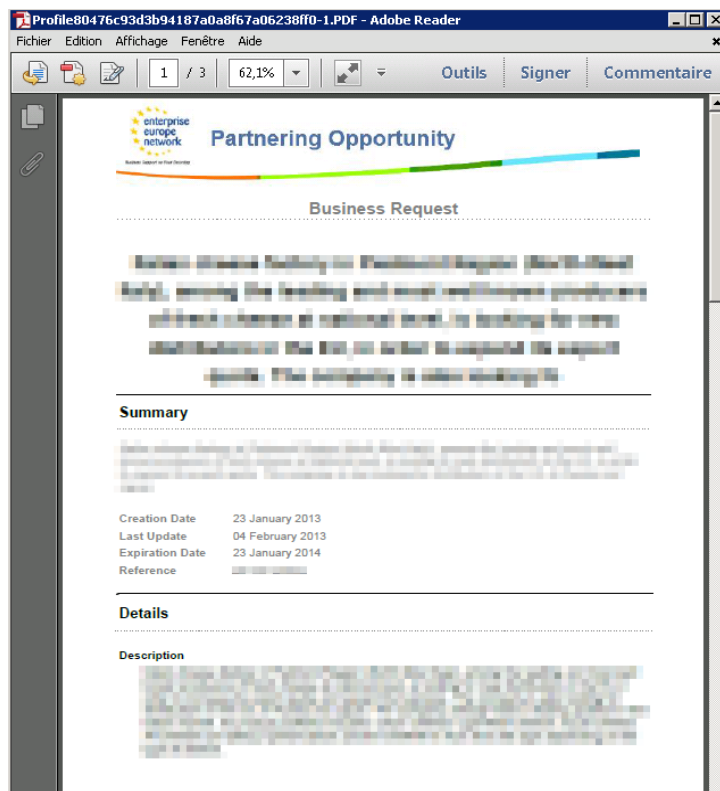
## Export All Profiles From Search Results

To export all profiles that you have found through the profile search functionality, do the following:

1. Search for your events using the filters and criteria that you select. To learn how to search events please see the Profile Search - Intranet section of the *Merlin Partner User Guide.*

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**Note:** You must limit your export of events results to less than 200 events. This is because the exported file size will be very large. If your event search shows more than 200 results it is recommended that you refine your search and try again

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2. Once your search has brought up enough profiles that you are happy with, click **Export.** The Export Results window will open:

3. Select the format that you wish to complete the export. (pdf, xlsx, docx).

4. Select the fields that you wish to export or select **All** to export all fields for each event.

---

**Note:** If you only select a few fields these are all that will be shown for each profile after export.

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5. Click **Submit** to start the export or **Cancel** to cancel your changes and return to the search results.

6. A pop up will open to say that the export operation was completed successfully. Click **OK.**

7. When prompted click '**Please click here to download the file**' or press **Cancel** to cancel your changes and return to the search results. A pop up will open asking what you would like to do with the file:

8. Select **Open with** and choose the program you would like to immediately open the file or **Save File** to save the file to your computer.

9. Click **OK.** The file will download and automatically open in the format that you requested.If you selected to save file in step 8, then the file will download to the downloads folder of your computer
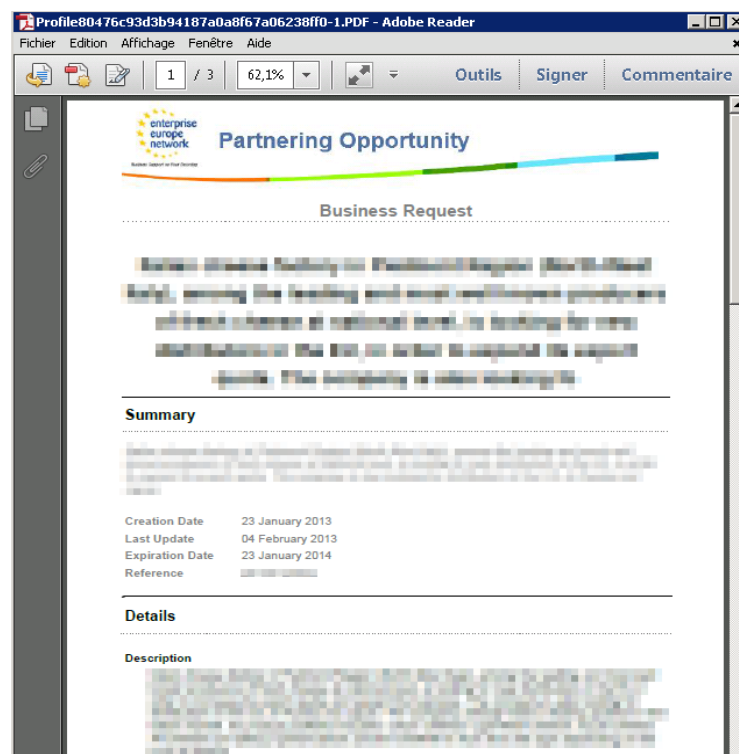


## Merlin POD Web Service

POD Web Service is a web service which, combined with POD XML, enables third-party systems to interact with Merlin Partnering Opportunities Database (POD) in order to retrieve profiles from and insert profiles into the POD. The web service is exposed with both SOAP and REST protocols and can be used with any type of client application, as long as the client is compatible with the standard protocols.

For more details, see "POD Web Service and POD XML," and the subsequent related chapters in this user guide.

# 5. Managing Clients and Queries

## Client Management

Clients are the key element for the effective running of the Enterprise Europe Network. All local networks rely on a growing client base. The Merlin intranet enables Partners to efficiently manage their growing client base from one location. Here it is possible to add new clients, review pending customers that have been passed on from other networks and edit existing clients - essentially all aspects of client management.

This section of the Merlin dashboard is a really effective way for Partners to instantly capture new client data i.e. at events or trade shows.

### Add New Client

To add a new client to your network, do the following:

1. From Partnering Home navigate to **Profiles > Profile Dissemination** and select **Client** and click **New Client.** The Create Client window will open. Alternatively, you can access the Create Client window by navigating to **Profiles > Profile Dissemination > Client > Client Management** > **My approved clients**, then click **New Client.**

2.  Choose an email to serve as username and a password. These will be the credentials that the client will use to log in to the client area.

3.  Provide the client's contact details.

4.  Select the appropriate EEN association from the list and the relevant contact person (usually yourself or someone from your network).

5.  Click **Approve the Client data** to complete their client data. The Create Query window will open so you can create the first query for your client.

---

**Note:** You must create a query for the client before their data is accepted. If you do not create a query for the client then their account will not be activated.

---

6.  Complete the Create query form as required. The information you provide in this form will determine the type of profiles that will be sent to the clients email address and the frequency that profiles will be sent. For further information on queries and query management please refer to the Query Management section of this Guide.

7.  Click **Save** to save the client or **Cancel** to quit customer registration without saving. Once you have saved the client they will now be visible in your dashboard as an approved client.

---

**Note:** Your client must agree with the EEN privacy policy statement in order for you to create an account for them. This is not required when you edit your client's details.

---

## Edit Client Information

To edit client details from your dashboard, do the following:

1.  From Partnering Home select **Profiles > Profile Dissemination > Client** and click **Client Management.** The Client Dashboard will open.

2.  Select **My approved clients** tab. A list of your active clients will be shown.

3.  Select the client you wish to edit. The client registration form will open.

4.  Edit the details as required.

5.  Click **Save.** The client edits will now be saved.

## Approve Pending Clients

To approve pending clients who have registered to your network, do the following:

1.  From Partnering Home select **Profiles > Profile Dissemination > Client** and click **Client Management.** The Client Dashboard will open.

2.  Select **My pending clients** tab. A list of clients pending activation will be shown.

---

**Note:** Pending clients are clients that will be added to your Network. They must be approved before their queries can be approved.

---

**3.** Locate the client you wish to approve or reject. Click  to edit the client. The edit client window will open.



**4.** Go through the form and ensure that all data is correctly added.

**5.** Click **Approve** to confirm the registration or **Cancel** to cancel and return to the dashboard.

**Remember**: If the client is not applicable to your organisation, you can assign them to another EEN partner, which you can select from the same form.

## Reassign a Client

There may be instances where you need to reassign a client to a different network. It is possible to reassign clients on an individual basis or alternatively, if you have the relevant Merlin user rights, you can reassign all clients. To learn how to reassign all your organisation clients see: Reassign all approved clients.

**Note:** The following instructions can be completed for both approved clients **and** clients who are pending your approval.

To reassign an approved client to a different network do the following:

**1.** From Partnering Home select **Profiles > Profile Dissemination > Client** and click **Client Management.** The Client Management dashboard will open.

**2.** Select **My approved clients** (or **My pending clients**) tab to view all your approved clients.

**3.** Navigate to the client who you wish to reassign and click the Edit Client icon [✎]. The Edit Client window will open:



**4.** Select a new location (country and/or city).

**5.** Click the **Partner** drop down list and select the client's new organisation.

**6.** Click the **Contact Person** drop down list to assign the client to a Partner within the new organisation.

**7.** Click **Reassign to another Partner** to reassign the client to the new organisation. A warning will open asking to confirm that you would like to reassign the client:



**8.** Click **OK** to confirm that you would like to reassign the client (or **Cancel** to cancel your changes). The client will no longer be present in your Customer dashboard. The Partner that you reassigned the client to will now see the client in the Customers dashboard of Merlin.

### Reassign all approved clients

**Note:** The following instructions can only be completed by a Profile Manager in Merlin. Standard users of Merlin can not reassign all approved clients.

There may be instances where a Profile Manager will need to reassign **all** approved clients to another Partner or organisation (i.e. in instances of EEN Partner networks being merged).

To reassign all approved clients, do the following:

1. From Partnering Home click **Profiles > Profile Dissemination** > **Client** > **Reassign All Clients.** The Reassign all approved clients window will open:

.



2. Select the country in which the network is located.
3. Select the EEN partner in charge
4. Select the contact person to whom you will assign your clients.
5. Click **Save.** The person you chose will now be able to see all the assigned clients in their Client Management dashboard.

## Query Management

When you make a query, you are making a request for information based on a selection of criteria. A query is different from a common search operation in that the search criteria of the query can be stored. Based on the stored query, you will receive updated results at regular intervals to an email inbox or via Merlin.

In Merlin you can create and update queries on profiles and events that you are interested in for yourself **and** your clients.

### Managing Queries

All clients and queries relating to you and your network that are pending confirmation or have already been approved can be managed from the following area of the dashboard.

To manage your queries, you must have an account and be logged in.

To access the **Client Management** dashboard, do the following:

1. Scroll the cursor over **Dissemination** in the dashboard drop down menu.
2. Click **Client**, then **Management.** The Client Management dashboard will open.

## Create a client query

As a Network partner, you can create queries for your clients who have an account in Merlin. From Partnering home select profiles > **Profile Dissemination > Client** and click **Client Management** to open the Client Management dashboard.
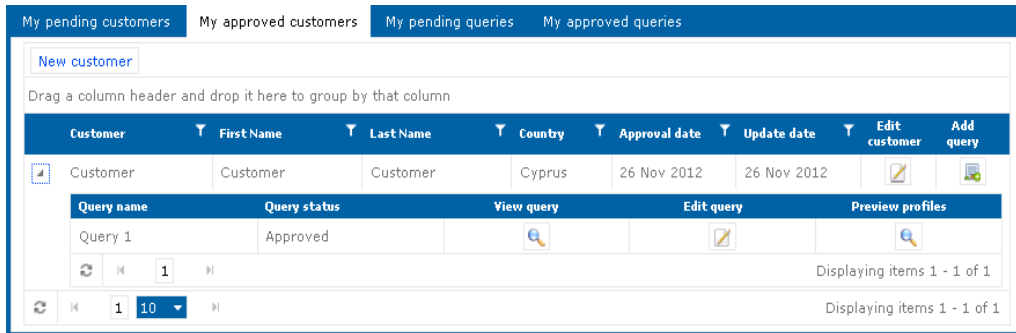


From here, go to **My approved clients** and select the relevant client you wish to create a query for, then click ⊕ to add a query. The query form will open:
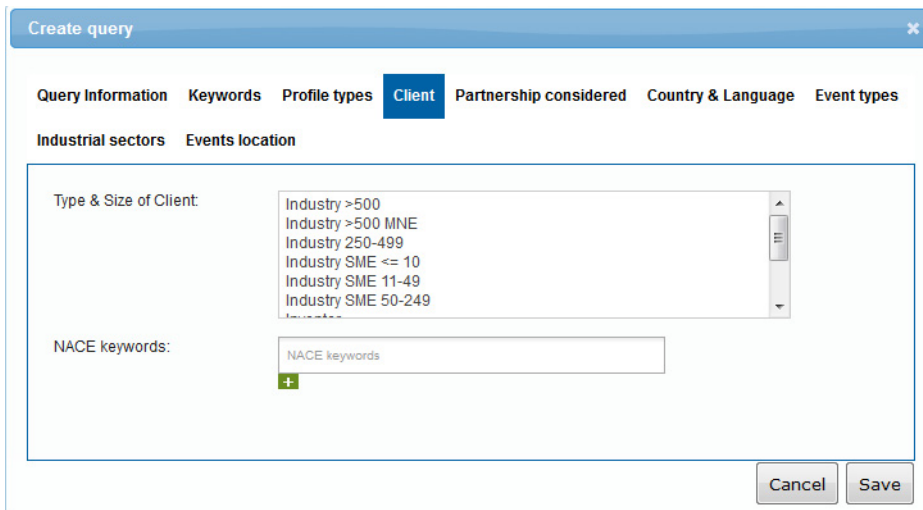


Fill out the query form. Here are a few tips:

---

**Note:** All fields marked with an asterisk (*) are mandatory. You can supply as much (or as little) information as you require. For example, if you want the query to contain only information regarding upcoming events that may be of interest to you/your client then you would add a Query name and complete the event types and events location field.

The more information you provide the less results you will receive, the less information you provide the more the results will be. For that reason it is advisable to regularly check the query and edit it to ensure that you receive the results that you are looking for.

---

1. In the **Query Information** section you can:
   - Give the query a name that is recognisable to you and your client. This will make it easier to locate
   - Indicate any free text words i.e. "nanotechnology and microprocessors" that are included in the profiles
   - Determine if the profiles should contain all the free text words or any of the free text word
   - Define how often the profiles are sent to you/your client by selecting Daily, Weekly Monthly or None in the **Receive Emails** field
2. In the **Keywords** section type the technology and market keywords that the profiles you are looking for should contain. A list of keywords will be proposed matching the combination of letters that you type. You can select multiple keywords for each field. Select the keywords carefully, as the relevance of the search results will be

influenced by the keywords you choose. Alternatively, you can click the ![+] icon to open the keyword picker, where you can add keywords from the tree view. For further information please see <u>Working with Technology, Market and NACE Keywords</u> section of this user guide.

3. The **Profile types** section relates to the types of profile your client/you would like to receive profiles for.

4. The **Client** section relates to the expected potential partner that the client is looking for.

5. The **Partnership considered** field indicates the types of partnership that your client is looking for. To select multiple types, hold the **Ctrl** key down on your keyboard and select the desired values.

6. In the **Country and language** section you can:

   - Indicate where the profiles originate from

   - Choose the countries that the profile is targeting

   - Define which languages are spoken by the client

7. In the **Industrial sectors** section you can define which sector groups that you want to receive results for. Sector groups are groups of partner organisations set up by the Network to offer specific support in specific business sectors (see http://een.ec.europa.eu/about/sector-groups). Certain profiles may be assigned to one of these sector groups.

8. In the **Event Types** and **Events Location** sections you can:

   - Determine if you want to receive Events information relating to the event type and event location

9. Click **Save** to submit the query. Your query will be displayed in your account page, under your personal details.

## View Approved Client Queries

To view queries that have been approved for a particular client, do the following:

1. From the Client Management dashboard click **My approved clients.** A list of your approved clients will be shown.
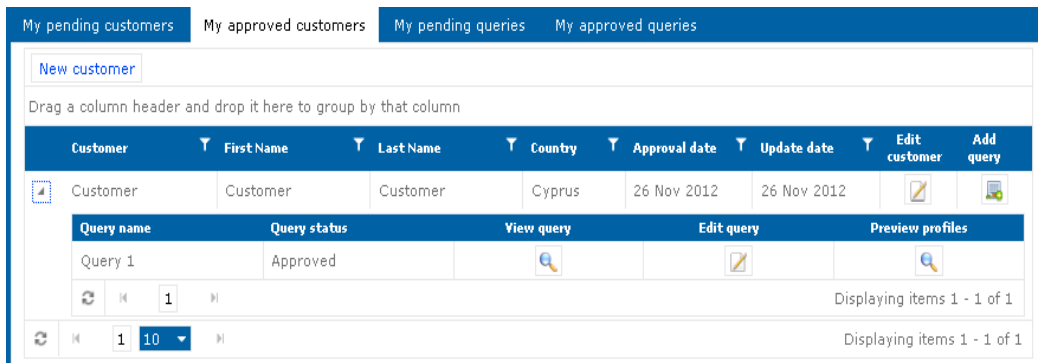


2. Click ▶ to view the active queries relating to a particular client.

3. Click 🔍 to view the query. The query will open in a separate window.
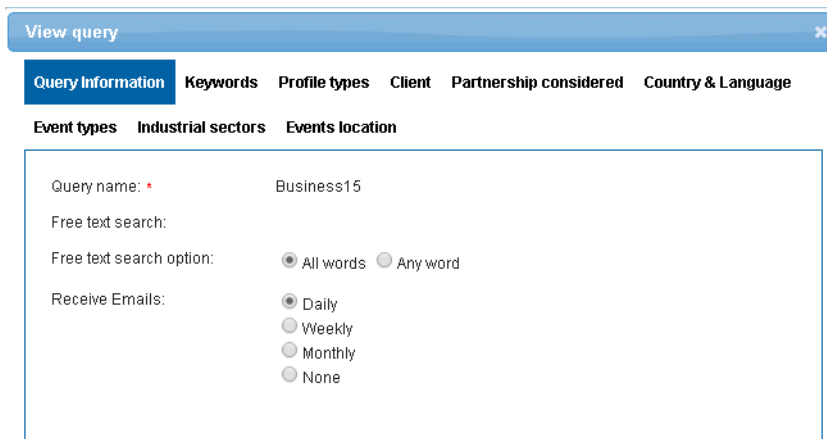
**4.** Click ☒ to close the query.

**Note:** To view all approved queries **without** seeing them assorted them by client then click the **My Approved Queries** tab in the **Client Management** dashboard.
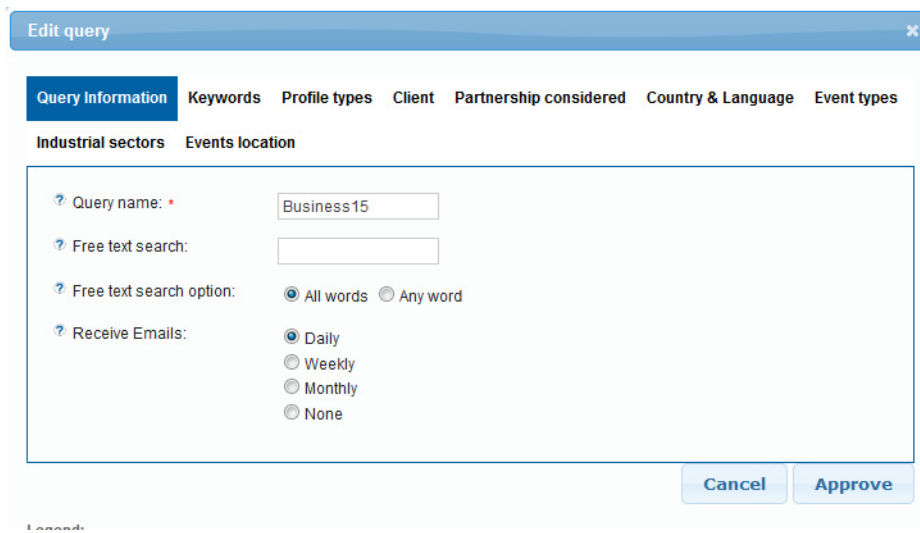
## Edit Approved Client Queries

To edit approved client queries, do the following:

**1.** From the Client Management dashboard, click **My approved clients.** A list of your approved clients will be shown.



**2.** Click ▶ to view the active queries relating to a particular client.

**3.** Click ✎ to edit a query.  The **Edit query** window will open.



**4.** Edit the query as required. Click **Approve** to confirm and save the new edits, **Cancel** to cancel the edit and return to the Client Management dashboard or **Delete** to delete the query.

## View Pending Queries

To view client queries that are pending approval, do the following:

**1.** From the Client Management dashboard click **My pending queries.** A list of pending queries will be shown.



**2.** Click 🔍 to view a particular query. The query will open in a separate window.



**3.** Click ✖ to close the query.

## Edit Pending Queries

To edit pending client queries, do the following:

**1.** From the Client Management dashboard click **My pending queries.** A list of pending queries will be shown.

**2.** Click ✎ to edit a query.  The **Edit query** window will open.



Edit the query as required. Click **Approve** to confirm and save the new edits, **Reject** to reject the edits and **Cancel** to cancel any edits and return to the Client Management dashboard.

## Create a Partner Query

It is possible to create queries that you, as a partner, will receive emails for and then be able to action on behalf of your clients. Partner queries differ slightly to Client queries as each query that you receive will give you access to the Partner organisation behind the Profile's contact details whereas a client who receives a query will only receive the contact details of their local Partner. It is possible to create Queries for Profiles and Events.

You can create a Partner Query for Profiles and Events via two ways:

- By running an advanced profile or event search in Merlin and clicking **Save as Query**.
- By navigating to your **My Queries** dashboard and creating a query manually. To learn how to do this please see the instructions below.

**Note:** The following instructions show how to create a Partner Query for Profiles however the process is the same for creating Partner queries for events. To create a Partner Query for Events then simply click the **My Events Queries** tab from the My Queries dashboard. See instruction 2 below.

To create a Partner query for yourself, do the following:

**1.** From Partnering Home navigate to **Dissemination** and click **My Queries.** The My Queries dashboard will open to display all your active queries:



**2.** Click **My Profile Queries** tab to show all profile queries that you have created.

---

**Note:** If you wish to create an event query then you should click the **My Event Queries** tab.

---

**3.** Click **New Query.** The Create Query window will open:



**4.** Fill out the query form, here are a few tips:

---

**Note:** All fields in the form marked with asterisk (*) are mandatory. You can supply as many (or as little) criteria for the query. However, please remember that the more detailed your query the less results it will produce. Likewise, the fewer criteria you define the broader the search results will be. For that reason it is advisable to regularly test and edit your query to ensure that it produces the desired results.

---

**4.1** Make sure you provide clear names for all your queries in the **Query Name** field; otherwise, you may not be able to distinguish between queries in the My Queries Dashboard list. Additionally, indicate how often you would like to receive emails containing new profiles for the query that you have created. You will begin to receive query results as soon as the query is saved and profiles matching your requirements are created.

**4.2** In the **Profile details** section you can indicate any free text words that you would like the profiles to contain. For example, you may wish to receive query results for profiles containing "nanotechnology and microprocessors". You can indicate if you wish to only receive profiles that contain **all** the free text words you supply or **any** of the free text words you supply. Additionally, you can indicate the stage of development and IPR status and the Profile date. In the profile date field you can define a date range (or a single date) to receive profiles only published, last updated or expires between two dates or until a defined date or from a defined date.

**4.3** In the **Profile Types** section indicate the types of profiles that you would like to be retrieved by the query.

**4.4** In the **Partners** section indicate the Partner organisation and/or Consortium and/or the sector group behind the searched profiles.

**4.5** In the **Keywords** section, choose Technology Keywords and Market Keywords applicable to the profile. It is advisable, though not mandatory, to choose the lowest level keywords if possible, as these are the most specific. You can select multiple keywords for each field. Select the keywords carefully, as the relevance of

the search results will be influenced by the keywords you choose. Alternatively, you can click the ➕ icon to open the keyword picker, where you can add keywords from the tree view. For further information please see Working with Technology, Market and NACE Keywords section of this user guide.

**4.6** In the **Client** section you can indicate the type and size of the client who is looking for partnering, as well as NACE keywords related to their business.

**4.7** In the **Partnership considered** section select the type of partnership that the client would consider. To select multiple types, hold the **Ctrl** key down on your keyboard and select the desired values.

**4.8** In the **Country and language** section you can determine the languages spoken by the owner of the profile, where the profile originates from and which countries they are looking for partnering opportunities in.

---

**Note:** The query fields are slightly different when creating an event query. Here you can select the event location, event type, define sector group, keywords and partner information.

---

5.  Click **Save** to save the query or **Cancel** to cancel the query and return to the My Queries dashboard. A pop up will open to show that the query has been successfully created. The query is now active:



### Edit a Partner Query

It is possible to edit your query at any time if, for example, you wish to change how often you receive the emails or you want to update the query keywords.

To edit a query, do the following:

1.  From Partnering Home select **Profiles > Profile Dissemination** and click **Profile Queries.** The My Queries Dashboard will open to show all active queries that you created:
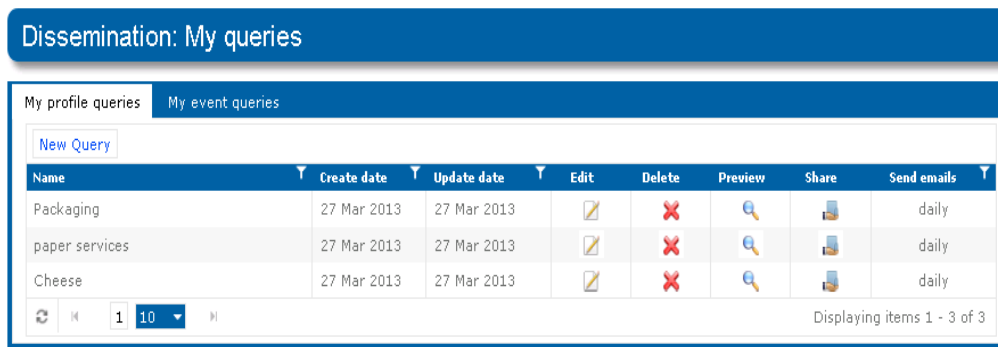


2.  Click **My Profile Queries** tab to view the queries you created for Profiles.

---

**Note:** If you wish to edit an event query then you should click the **My Event Queries** tab.

---

3.  Locate your query for edit in the table and click ✎ . The Edit Query window will open:
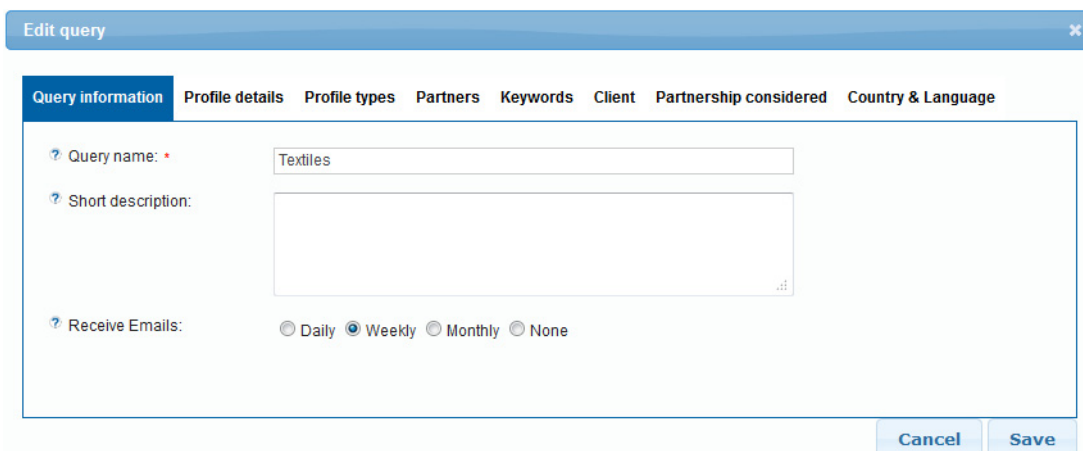


4.  Edit your query as required. Remember to ensure that all fields marked with an asterisk(*) are mandatory.

5. Click **Save** to save your changes or **Cancel** to cancel and return to the My Queries Dashboard. A popup will open to show that your edits have been saved:
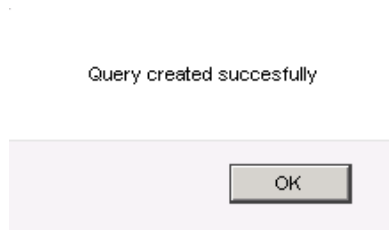


## Preview a Partner Query

It is possible to preview your query to view all results that the query has produced at any time. To do so, do the following:

1. From Partnering Home select **Profiles > Profile Dissemination** and click **Profile Queries.** The My Queries Dashboard will open:
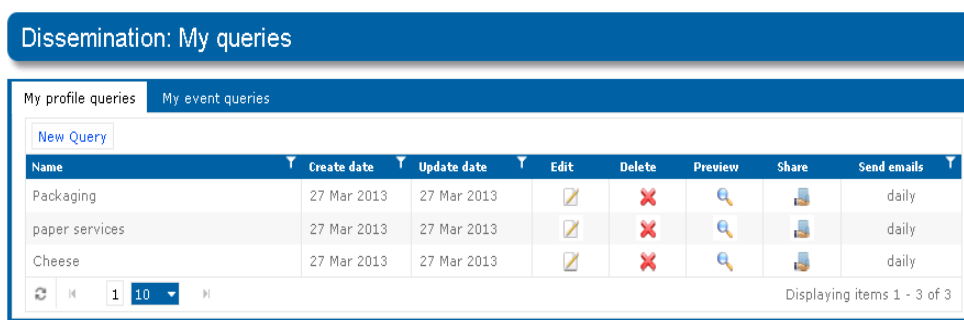


2. Click **My Profile Queries** tab to view the queries you created for Profiles.

**Note:** If you wish to preview an event query then you should click the **My Event Queries** tab.

3. Locate the query that you wish to preview in the list and click  . The preview query window will open which display a list of all records for the query:
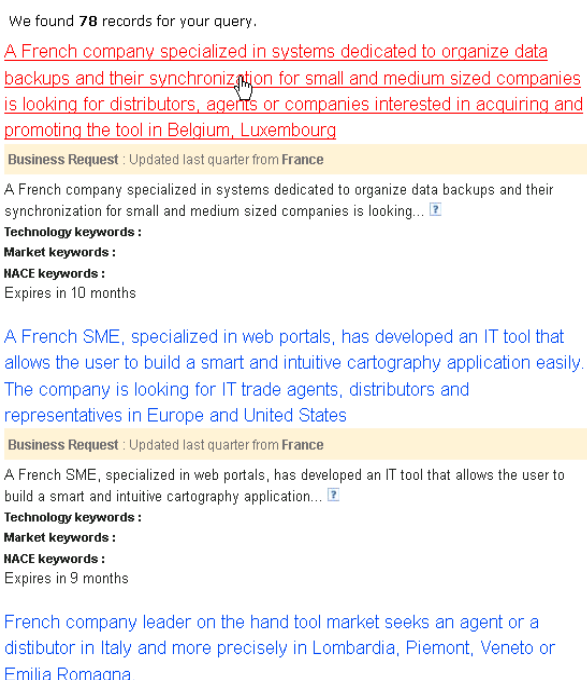


4. Click on a profile title to view the profile and contact details for the Partner organisation behind the profile.

## Delete a Partner Query

If you have no further need for a query you can easily remove it.

**Note:** Deleting a query removes it completely from the system. The query will not be archived and it cannot be re-activated.

To delete a partner query, do the following:

1. From Partnering Home select **Profiles > Profile Dissemination** and click **Profile Queries.** The My Queries dashboard will open.
2. Click either **My Profile Queries** or **My Event Queries** tabs dependent on the type of query you wish to delete.
3. Locate the query you wish to delete in the table and click ✖ . The Delete Query popup will open asking you to confirm your selection:
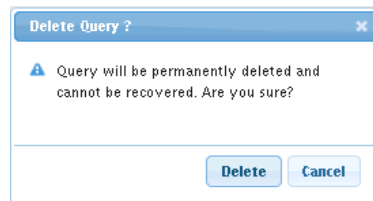
4. Click **Delete** to remove the query or click **Cancel** to cancel your selection and return to the My Queries dashboard without deleting. A Popup will indicate that the query has been deleted successfully:
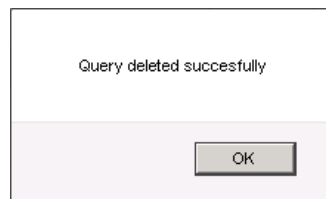
## Share a query

Occasionally, it may be beneficial to share a query with other partner users (both inside and outside your own consortium). Queries can be shared with users having the public flag (i.e users who agreed to have their profile displayed to he Network). To share a query, do the following:

1. From Partnering Home select **Profiles > Profile Dissemination** and click **Profile Queries.** The My Queries dashboard will open.
2. Click either **My Profile Queries** or **My Event Queries** tabs dependent on the type of query you wish to share.
3. Locate the query you wish to share and click 🖫 . The Share query window will open:

4. Provide a **Query name** that will be recognizable to the recipient of the query as this will be the new query name for all recipients.
5. Supply any **Comments** that will be included in the email that is sent to the recipient notifying them that they have received a shared query.

6. In the **Share Query with** field enter as many names of those to receive the shared query as required. You can share your query with **any** user of Merlin.

7. Click **Share** to share the query or **Cancel** to return to the My Queries dashboard without sharing your query. Once you share the query the it will be sent to all the recipients you specify via email.

   The recipient(s) will be able to see their shared query in their My Queries dashboard when they log in to Merlin. The Query will contain the Query name you provide, a date stamp and reference number to distinguish the query from others (i.e. <Query name>_<Query send date>_<Reference number>).

## Stakeholder Management

As a Partner your organisation may have a number of Stakeholders, such as clusters in your region who you work with. Your Stakeholders have the opportunity to add the Stakeholder widget to their website which serves as another useful dissemination tool for potential clients looking for partnering in the network.

If your Stakeholder has the Stakeholder widget installed on their site, anonymous and subscribed clients can register and log in to the Merlin client site, search profiles and events and create expressions of interest which will be directed through your organisation.

As a Partner with a Stakeholder your responsibility is to:

- Manage your stakeholders (Create, edit, delete Stakeholder)
- Receive statistics on the Stakeholder widget usage (Currently in development)

All of this functionality is managed from the Stakeholder management dashboard. To access the Stakeholder Management dashboard log in to Merlin and click **Profiles > Profile Dissemination > Stakeholder.** The Stakeholder Management Dashboard will open:



From here it is possible to view all stakeholders for your organisation, add a new stakeholder, editing existing stakeholder and complete other administrative tasks relating to Stakeholder management.

Please see below to learn how to manage your Stakeholder in Merlin. Alternatively, for instructions on using the Stakeholder widget in Merlin please refer to *Merlin Stakeholder User Guide.*

**Note:** If you cannot see the Stakeholder menu, contact the EEN Support team, who will give you proper access.

### Add a new Stakeholder

As a Partner you can add Stakeholders to your organisation as they have been approved by the Agency.

To create a new Stakeholder, do the following:

1. From Partnering Home navigate to **Profiles > Profile Dissemination** and click **Stakeholder.** The Stakeholder dashboard will open. This shows a list of all Stakeholders for your consortium.

**2.** Click **New Stakeholder.** The Add Stakeholder window will open:



**3.** Fill in all details possible. Remember that all fields marked with an asterisk (*) are mandatory.

**4.** Click **Save** to save the information or **Cancel** to reset your edits and return to the Stakeholder dashboard.
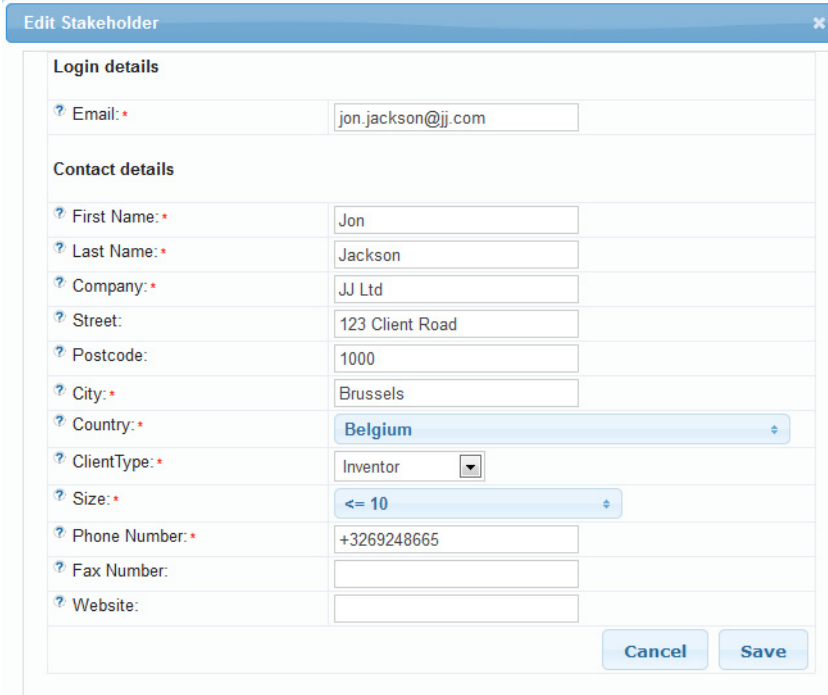
The Stakeholder will receive an email at the address you specify where they must activate their account and change their password.

## Edit a Stakeholder

To edit an existing Stakeholder, do the following:

**1.** From Partnering Home navigate to **Profiles > Profile Dissemination** and click **Stakeholder.** The Stakeholder dashboard will open. This shows a list of all Stakeholders for your consortium.

**2.** Navigate to the Stakeholder that you wish to edit and click ✎ to edit the stakeholder. The Edit Stakeholder window will open.
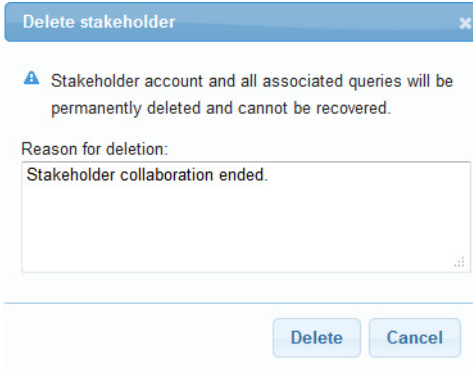


**3.** Make all edits you require. Remember that all fields marked with an asterisk (*) are mandatory.

**4.** Click **Save** to save your edits or **Cancel** to reset your changes and return to the Stakeholder list without saving.

## Delete a Stakeholder

To remove an existing Stakeholder, do the following:

**1.** From Partnering Home navigate to **Profiles > Profile Dissemination** and click **Stakeholder.** The Stakeholder dashboard will open. This shows a list of all Stakeholders for your consortium.

**2.** Find the Stakeholder that you wish to delete and click the icon ✖ . A dialog will appear, where you must provide a reason for deleting the Stakeholder.



**3.** Provide the reason for deletion, and click **Delete**. The system will provide a confirmation of deletion, and the Stakeholder account will disappear from your dashboard.

# 6. Managing Expressions of Interest

The goal of an expression of interest (EOI) is to allow you to show an interest for a particular POD profile. It is the first step in establishing business relationships with other companies and organisations throughout Europe with the help of the Enterprise Europe Network.

You can make expressions of interest on a selection of profiles that have been published directly on the Network website, or on profiles that you have searched for yourself using the profile search functionality (see Disseminate Profiles).

**Note:** Please be aware that the expression of interest function is still undergoing development. As a result not all features may be available immediately.

## Expression of Interest - Management Dashboard

All expressions of interest that are made and received are managed from one of two **Expression of Interest - Management Dashboards,** which are found under **Profiles > EOI.**

- My EOIs (loosely defined as expressions of interest that you/your organisation make)
- EOIs Received (loosely defined as expressions of interest that you/your organisation receive)

From these pages you can manage:

- **EOIs made by My Local Clients**
- **EOIs made by My Organisation**
- **EOIs Received**
- **EOIs Awaiting Other Partner Action**
- **Archived EOIs for My Profiles**
- **My Archived EOIs**

It is possible to tell which expressions of interest require your input in both of the dashboards by looking at the **view** column of each of the tables. From this column you will see the icon **NEW** which shows that there are actions needing your/your organisation input. As soon as you click into a profile or make advances in the expression of interest process then the **NEW** icon will disappear to signify that the EOI has been read and is being actioned by a person. For this reason it is very important that you communicate with members of the management of your EOIs because as soon as a EOI has been opened the **NEW** icon will disappear.

Additionally, when an EOI is going through the discussion and negotiation stages between your organisation and the Partner organisation behind a profile you may see the icon ✉ under the **view** column of a table to signify that there is a new message for the EOI that requires your organisations input. The red number next to the ✉ icon determines how many new messages are awaiting your input.

**My EOIs Dashboard:**



**EOIs Received Dashboard:**

**Note:** Sometimes, multiple EOIs received for the same profile may be shown in different dashboards, depending on their status. To see all the EOIs received for a particular profile, open the profile in any of the dashboards and scroll down to the bottom of the page. All associated EOIs are listed here. To view the details of a particular EOI, click the icon 🔍 .



### Expression of Interest -Management Dashboard Table Definitions

Each of the six tables found in both the Expression of Interest Management Dashboards are defined below:

#### EOIs made by Local Clients

The 'EOIs made by Local Clients table' shows profiles that have been subject to expressions of interest (EOI) from local clients (anonymous users or subscribed clients) but are still awaiting you/your organisation's action.

Profiles in this table should be actioned within 14 days by you/your organisation by contacting the client who created the EOI and then compiling all necessary information to send the EOI to the Partner in charge of the Profile.

To do this, click a profile name in this table and select Create an Expression of Interest.

Profiles will move from the **EOIs made by Local Clients** to the **EOIs made by My Organisation** table in the **My EOIs dashboard** once you/your organisation has sent the EOI to the Partner in charge of a Profile.



#### EOIs made by My Organisation

The 'EOIs made by My Organisation' table shows expressions of interest (EOI) that you/your organisation have made for profiles either:

1.  As a Partner to Partner. This means that the profile is found by you/your organisation via intranet search and you/your organisation created and sent an EOI directly to the Partner behind the Profile. EOIs of this type will not contain client information in the table.

2.  As a Partner representing your local client who created the EOI which you then manage on their behalf by sending the EOI to the Partner behind the Profile. In this instance you/your organisation can see your client information shown in the table.

The Partner behind the Profile will see the EOI you/your organisation created on their dashboard in the **EOIs Received** table (located on the Received EOIs dashboard). If certain fields in the table are blank it indicates that the EOI is a Partner to Partner EOI.

Click **View** to see the status of the EOI and to monitor, add comments and ask questions to the Partner organisation where the profile originates.



## My Archived EOIs

The 'My Archived EOIs' table shows all past EOIs that you have sent, which have been rejected/did not reach an agreement. Profiles that have been given the EOI Status 'Companies Not Interested' will be visible in this table.

**Important:** Once an EOI is archived it is not retrievable. You will need to recreate the EOI again if you accidentally archive the EOI.



## EOIs Received

The 'EOIs Received' table shows your organisations profiles that have received an expression of interest (EOI).

You/your organisation will receive EOIs in this table via 3 ways:

1.  The EOIs are sent to you/your organisation by Partners when their client (anonymous user or subscribed client) creates an EOI for your profile.
2.  EOIs which are automatically forwarded to you/your organisation by the system when the Partner who is in charge of sending you their clients EOI does not react (i.e. they didn't follow up with you/your organisation, did not send you/your organisation messages or they did not update the EOI status) within the 14 day limit.
3.  Partner to Partner EOIs. Meaning when a Partner makes an intranet search and makes an EOI for your profile without their clients knowledge. In this instance, there is no client behind the Partner sending the EOI.

In points 1 and 3 the 'EOI made by' field of the table is empty to maintain client anonymity. The 'EOI made by' field will not be empty when point 2 occurs because the Partner did not action the EOI within 14 days so you will receive the EOI and client contact details automatically.

**EOIs Received** ⑦

| Profile Name | Profile Type | Origin Type | EOI made By | Profile Reference | Created Date ▾ | Local Partner | Partner Contact Person | EOI Status | View |
|---|---|---|---|---|---|---|---|---|---|
| ● Computer-aided General Morphological Analysis for Decision... | Technology Offer | Partner | | 12 SE 67BY 3R53 | 11 Apr 2013 | Cyprus Chamber Of Commerce & Industry | | Pending | 🔍 |
| ● Universal Force Measurement System | Technology Offer | Partner | | 13 SE 67BY 3RN9 | 11 Apr 2013 | Cyprus Chamber Of Commerce & Industry | | Pending | 🔍 NEW |

↻  |◀ ◀ 1 ▶ ▶|   Displaying items 1 - 2 of 2
Show All

## EOIs Awaiting Other Partner Action

The 'EOIs Awaiting Other Partner Action' table shows your organisations' profiles that clients have made an expression of interest (EOI) for, but the Partner managing the client has not yet followed up with you/your organisation about the EOI. At this stage, you are not yet able to see the details of the EOI.

Once the Partner who is managing the client follows up on the EOI with you/your organisation, the profile will be moved from the **'EOIs Awaiting Other Partner Action'** table to the **EOIs Received for My Profiles** table, where you will be able to see the full details of the Expression of Interest.

If the Local Partner does not action their clients' EOI within 14 days then the EOI will automatically be sent to you/your

organisation. The EOI information will automatically be moved to the **EOIs Received** table and the EOI and client contact data will be visible to you/your organisation.

⑦ **EOIs Awaiting Other Partner Action**

| Profile Name | Profile Type | Profile Reference | Created Date ▾ | Local Partner | Contact Person | Due Date |
|---|---|---|---|---|---|---|
| ● French company, commercial agent specialised in marketing of... | Business Request | 20130128038 | 13 Nov 2014 | | | |
| ● French supplier of copper, brass, bronze, aluminium... | Business Offer | BOFR2014080100 3 | 6 Nov 2014 | | | |
| ● French manufacturer looks for finishing solutions' suppliers... | Business Request | BRFR20140807002 | 25 Sep 2014 | | | |
| ● French manufacturer of wire harnesses, connectors and... | Business Offer | BOFR2014071700 1 | 1 Sep 2014 | | | |

↻  |◀ ◀ 1 2 3 4 ▶ ▶|   Displaying items 1 - 4 of 14
Show All

## Archived EOIs for My Profiles

The 'Archived EOIs for My Profiles' table shows all past EOIs that you/your organisation has received for your profiles that have been rejected/did not reach agreement. Profiles that have been given the EOI Status 'Companies Not Interested' will be visible in this table.

**Important:** Once an EOI is archived it is not retrievable. You/your organisation will need to recreate the EOI again if you accidentally archive the EOI.

**Archived EOIs for My Profiles** ⑦

| Profile Name | Profile Type | Profile Reference | Created Date ▾ | Local Partner | Contact Person | Due Date | EOI Status | View |
|---|---|---|---|---|---|---|---|---|
| No records to display. | | | | | | | | |

↻  |◀ ◀ 1 ▶ ▶|   Displaying items 0 - 0 of 0
Show All

## Make an EOI as a Client

The following instructions will look at making an EOI as an anonymous user (via the Merlin widget). It assumes that the client has already completed a Basic search or Advanced search. If you have not yet done this, see Disseminate Profiles

1.  Open the profile you are interested in by clicking on **Profile**, then click **Request More Information** at the bottom of the profile details page. The EOI form will open:



2.  You have the following options:
    *   If you are already a subscribed client, click on **Click here to sign in**. Thus you will be able to make the expression of interest quicker, using your account.(See *Merlin Client User Guide* for more information).
    *   If you wish to make the EOI on the selected profile and receive further information about the types of profiles that interest you on a regular basis, click on **Click here to register** (See *Merlin Client User Guide* for more information).
    *   Otherwise, complete the EOI form as indicated in the following steps.

3.  Answer the questions in the form. Please provide as many details as possible. This will help the Enterprise Europe Network to provide you with assistance better tailored to your needs.

4.  Provide your contact details. The **City** drop-down box contains a list of cities in your country where Network partners are active.
    *   If your city is on the list, select the city, and click **Save**. Your EOI is submitted and you will be contacted by a Network representative as soon as possible.
    *   If your city is not on the list, select **none of the above**. You can then type the name of your location and then select the city closest to you.

5.  The system will display the list of partners that are active in the chosen city. Select a partner.

6.  Enter your email address and phone number so you can be contacted by the partner organisation who will be managing your EOI.

7.  Click **Save**. Your EOI is submitted and you will be contacted by a Network representative as soon as possible. Alternatively, click **Back to profile** to return to the profile without sending the EOI.

## Make an EOI as a Partner

There are two instances in which you will be required to make an Expression of Interest on another partner's profile:

- when you are asked by a client to make the EOI on their behalf
- when you receive an EOI from a client (either registered or anonymous) via the EEN IT platform, and you need to follow- up on it, namely to make an EOI yourself using the client's pre-filled EOI as a starting point. In the case, your EOI can always be traced back to the original client EOI, as explained further in this section.

In both cases, take the time to analyse the client's request and decide whether it is eligible or whether it should be rejected (see Reject a Client EOI).

### Make an EOI on behalf of a client:

To make an internal expression of interest to a local partner behind a profile on behalf of a client's request, do the following:

1. Find the relevant profile using the search tool, then click on its title to open it.
2. Click the **Create Expression of Interest** button at the bottom of the profile form.
3. Complete the Expression of interest form on behalf of your client. Be as detailed as possible to increase the chances of a positive reply.



4. Assign a contact person from your network who will be the contact point for the partnering process.
5. Add any attachments as required to support the EOI.
6. Click **Submit** to submit the expression of interest to the local partner. Your EOI will be found in the **EOIs Made by My Organisation** table of your **My Expressions of Interest** Dashboard.

### Follow-up on a client EOI

In the **EOIs Made by My Local Clients** table under the **My Expressions of Interest Dashboard** you will find all the EOIs submitted to you in electronic form via the EIT platform. Here you can decide whether you want to follow-up on or reject a client's EOI using the system.

To follow-up on an EOI in this dashboard, do the following.

1. Click on the spyglass icon next to an entry to view the client's EOI and the profile on which the EOI was made.

2. After carefully reviewing the EOI and the profile, scroll down to the bottom of the window that opens and click **Follow up EOI**.

3. The EOI form will open, with the information pre-filled by your client:



4. Complete the Expression of interest form using your client's EOI as a starting point. Be as detailed as possible to increase the chances of a positive reply.

5. Assign a contact person from your network who will be the contact point for the partnering process.

6. Add any attachments as required to support the EOI.

7. Click **Submit** to submit the expression of interest to the local partner. Your EOI will be found in the **EOIs Made by My Organisation** table of your **My Expressions of Interest** Dashboard. Next to it you will find a link to view the original client EOI.



## Reject a Client EOI

As mentioned previously, as a Partner you have the option to reject a client's EOI, if for any reason you deem it not to be pertinent.

To reject a client EOI, do the following:

1. In the **EOIs Made by My Local Clients** table under the **My Expressions of Interest Dashboard** click on the spyglass icon next to the desired entry to view the client's EOI contents and the profile on which the EOI was made.

2. Scroll down to the bottom of the page that opens and click **Reject EOI.**

3. The **Reject Expression of Interest** page will open. Follow the instructions on page to provide a reason to your client and the other partner for rejecting the EOI, and then click **Submit**.

## Reject expression of interest

**Reject expression of interest**

Please provide a reason for rejecting this EOI.
Your explanations will be emailed to your client and to the partner behind the profile from a **no-reply email address.** Therefore, please ensure that you indicate **at least the following information** in each of your messages:

For your client:

- A reference to the profile (e.g. the POD reference or the title).
- The contact details of the colleague in your organisation who is in charge of that client, should the client have further questions.
- The reason why the EOI was rejected

For the partner behind the profile :

- The POD reference of the profile
- Optional: the reason why the EOI was rejected

**Remember:** You are not obliged to disclose any data about your client at this stage.

Message for your client
*

600 characters left

Message for the partner behind the profile *

600 characters left

Back to My EOIs     Submit

**4.** The rejected EOI will be archived. You can view it under **My Archived EOIs**, with the status set automatically by the system Rejected.

? **My Archived EOIs**

| Profile Name | Profile Type | Origin Type | Original EOI Made By | Profile Reference | Created Date ▾ | Partner Behind the Profile | EOI Status | Original EOI | View |
|---|---|---|---|---|---|---|---|---|---|
| ● WASTE-6a-2015: SMEs and Universities sought for Green... | Research & Development Request | Anonymous Client | | | 25 Mar 2015 | | Companies not interested | | 🔍  ✉ 1: |
| ● Urgent -H2020 - Traditional high performance materials... | Research & Development Request | Subscribed Client | | | 24 Mar 2015 | | Rejected | | 🔍 |

**Note:** If you are the Partner behind the profile for which an EOI was rejected by a local partner, you will also find this EOI under **Archived EOIs for My Profiles.**

## View and update Expression of Interest status

To view the progress, make contact, ask local partners questions regarding the expressions of interest and change the status of your EOI, do the following:

1. From the Expression of Interest - Management Dashboard select **View EOI.** The expression of interest will open in a new window.:



2. From here you can contact the local partner for information by typing a message, view the message history and update the EOI status. (If the EOI is already closed, the comments field is not available).

3. Click **Save** to save any changes you make, alternatively click **Back to main dashboard** to return to the main dashboard without saving.

---

**Note:** Once an EOI status has been saved as Signed Agreement then the EOI will be archived and considered complete.

---

## Reassign Expressions of Interest

At times, it may be necessary for an EEN partner to reassign expressions of interest to other partner organisations.

It is currently possible for you as a profile manager to reassign active (i.e. not archived) EOIs coming from **anonymous** users (e.g. when such users are not based in your area of operation) as well as EOIs made by your organisation which are **not linked to an original client EOI** (e.g. in cases in which your activities must be taken over by another EEN partner, etc...).

To reassign an EOI do the following:

1. Navigate to **Merlin Partnering> Profiles >EOI >My EOIs.**

2. In the **EOIs made by My Local Clients** and the **EOIs made by My Organisation** tables, the EOIs that can be

   reassigned have the icon  .

**3.** Click the icon to reassign the desired EOI. The Reassign EOI page will open.

**4.** Select the EEN Partner organisation to which you would like to transfer the EOIs:



**5.** Click **Reassign EOI.** Your EOI will be sent to the partner organisation you specified, and the default client contact from that partner will receive an email notification. They will see the EOI in the equivalent table in their EOI dashboard (EOI > My EOIs), where it will be marked as **NEW**. Once reassigned, the EOI will disappear from your dashboard.

**Note:** Once you reassign an EOI to another EEN Partner it is not possible to cancel or amend your decision. The only way to reverse the process is by contacting the Partner organisation you reassigned the EOI to and getting them to reassign the desired EOI back to you.

EOIs can only be reassigned one by one.

If you wish to **reassign EOIs** coming **from registered clients**, you must **reassign the clients**, and all related EOIs will be reassigned automatically. For more information about reassigning clients, please see "Reassign a Client".

# 7. Embedding Merlin in Your Website

Merlin comes packaged with a number of 'widgets' that can be added to a website to pipe through live active profiles and events to your website. These are great dissemination tools to promote your clients profiles and organisation events to users who may be looking for partnering opportunities with other businesses across the network.

There are two types of Merlin Widget available to you subject to your role in the network:

- **Partner Widget** (For use by Partner organisations on their organisation websites. This widget allow clients (anonymous and subscribed) to conduct searches, make expressions of interest, and register to the network)
- **Stakeholder Widget** (For use by Stakeholders on their 3rd party websites. This widget enables Stakeholders to create a query which shows specific active profiles relating to their field i.e. nanotechnology in a live feed form, client registration to the network and search functionality)

This chapter will provide an overview of widgets and also instructions for adding both widget types to your website.

## What is a widget?

A widget is a small piece of code that is added to a website to enable a function that usually occurs in another site i.e. a website could have a widget that contains today's weather for a certain region. The data in the widget would be piped through from a popular weather website. This is done by a widget. In the case of Merlin, the data that is piped through into a Partner site or 3rd party website would be active profiles and the functionality to search profiles and register.

The following diagram indicates a widget in action. The image shows a partner site that is piping profiles through to its home page from Merlin. The red box indicates a type of widget:
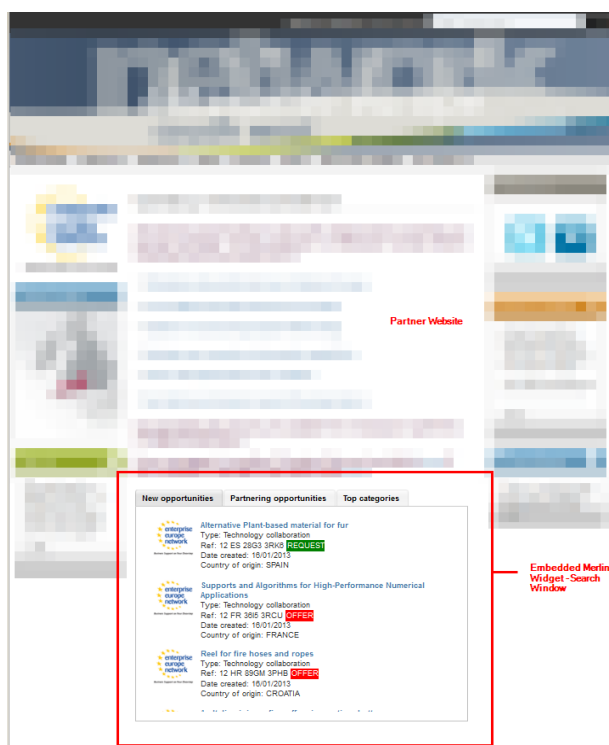
## Why should I embed Merlin in my website?

With Merlin embedded in your site your users can:

- Search profiles using Simple and Advanced search functionality. Available for both anonymous and registered users.
- Client Registration (See *Merlin Client User Guide*)
- Sign in (if the client is an existing user)
- Create queries (when signed in) (See Managing Clients and Queries)
- Create expressions of interest. Available for both anonymous and registered users. (See Managing Expressions of Interest)
- Stakeholders can create a customisable query that injects profiles of a particular industry i.e. nanotechnology and have profiles showing a live scrolling feed of profiles on their website.

## How can I embed Merlin in my website?

It is straightforward to add a Merlin widget to your website if you have a basic understanding of how to edit web pages and HTML code.

**Important:** If you are not comfortable with this, then we recommend that the task is done by the original creators of the website or your local website administrator (if you have one).

For in-depth information on adding a widget to your site please see the following chapters which relate specifically to installing different types of widgets.

### Add Merlin search window to your website

To add a Merlin search window to your website to allow users to search the network, do the following:

1.  From Partnering Home click **Profiles > Profile Dissemination > Partner Widget.** The Widget page will open containing the html code needed to show various types of widgets that you can add to your site.
2.  Scroll to the box '**Add Merlin search facility to your website**'

> To add Merlin search facility to your Website:
>
> - 1. In an html editor, open for edit the web page that you wish to add the Merlin search window.
> - 2. Copy the following html code, in full:
>
>   ```
>   <iframe src="http://merlin.netdev.eaci.int/tools/services/SearchCenter/Search/Search?orgaId=CY150140-02" height="1200" width="800" frameborder="0"></iframe>
>   ```
>
> - 3. Check that the Organisation ID (i.e. orgaId=CY00251) matches your OrganisationID.
> - 4. Paste the html code into your html editor where you wish the Merlin search facility to be visible.
> - 5. Test the page in the html editor to see if the search facility renders as required.

In the html code you will notice that your organisation ID (i.e. `orgaId=CY150140-02`) has been auto-populated automatically.

3.  In an html editor, open the web page that you wish to add the Merlin search window.
4.  Copy the full html code highlighted in yellow.
5.  Paste it into your html editor where you wish the search window to be visible.
6.  Adapt the parameters **height**, **width** and **frameborder** to fit your website.

**Note:** By default the height is 1200 pixels, width is 800 pixels and frameborder is 0 (Off). Change frameborder to 1 if you wish a border and adapt the height and width to suit you.

---

**Note:** The **recommended** minimum width for a search iframe widget is 700 pixels.

---

7. Test the page in the html editor to see if the search window renders as required.

8. If necessary, repeat step 6 and 7 until you are happy with how the widget displays.

## Add Merlin embedded window to register and/or connect from the Partner website

To add a Merlin embedded window to allow user registration and login to the network, do the following:

1. From Partnering Home click **Profiles > Profile Dissemination > Partner Widget.** The Widget page will open containing the html code needed to show various types of widgets that you can add to your site.

2. Scroll to the box '**Add Registration or Connect to Partner Website Functionality to your Website'**,



In the html codes, you will notice that your organisation ID (i.e. `orgaId=CY150140-02`) has been auto-populated automatically.

3. In an html editor, open the web page that you wish to add the client registration or login window.

4. Dependent on your requirements, copy **one** of the html codes highlighted yellow (including all html tags).

5. Paste the code into your html editor where you wish the client registration or client login window to be visible.

6. Adapt the parameters **height**, **width** and **frameborder** to fit your website.

---

**Note:** By default the height is 1200 pixels, width is 800 pixels and frameborder is 0 (Off). Change frameborder to 1 if you wish a border and adapt the height and width to suit you.

---

**Note:** The **recommended** minimum width for a login/register iframe widget is 500 pixels.

---

7. Test the page in the html editor to see if the widget renders as required.

8. If necessary, repeat step 6 and 7 until you are happy with how the widget displays.

## Add Merlin Stakeholder Widget to your Website

---

**Note:** The Merlin Stakeholder widget is only available to those Partners who have been given Stakeholder rights.
To create a stakeholder for one of your clients go to **Profiles > Profile Dissemination > Stakeholder** from the Merlin Dashboard.

---

The following guide shows how someone with Stakeholder rights would implement the widget to their site. For further detailed information please refer to the *Merlin Stakeholder User Guide*

---

The Merlin Stakeholder widget allows users to pipe through specific profile types into 3$^{rd}$ Party websites (i.e. clusters). It is aimed at organisations who specialise in particular industry fields to enable them to promote Merlin profiles for prospective and existing clients who are interested in partnering opportunities.

The Stakeholder tool consists of a search functionality, live ticker feed which would show profiles scrolling on your website, and client registration functionality.

To install the Stakeholder widget to your 3$^{rd}$ party (cluster) website, do the following:

1. Log in to the client site as a Stakeholder.
2. From the client dashboard, click **My Account > My Data and Queries.** The Edit my account window will open.
3. Scroll to the bottom of the page to **Queries and Saved Searches.** Select the query that you wish to embed to your site.
4. Click ⊙ to open the **Widget Info** window.
5. Select the type of widget you would like to insert into your site and follow the on screen instructions.

---

**Note:** Please note that your search widget will only display the profiles matching the search criteria selected in the query that the widget was created from.

---

# 8. POD Web Service and POD XML

The following chapters explain the web services[1] to retrieve Enterprise Europe Network partnering profiles from the Merlin Partnership Opportunities Database (POD)[2] in POD XML format.

**Version**

The current versions are: POD Web Service version 6 and POD XML version 4 (Patch 1).

**Intended audience**

- Enterprise Europe Network partners using third party systems / local systems to collect profiles.
- Developers of the web service client

## What are POD Web Service and POD XML?

A key functionality of Merlin is the interface to **disseminate and integrate profiles with Network partners' local systems.** This will be done using the POD Web Service, a web service provided by Merlin. In Merlin please navigate to **Partnering > Profiles > Profile Dissemination > POD Web Service.**

The POD XML data model, or 'POD XML' is the definition in XML of the structure and contents to represent a partnering profile when interfacing with the POD.

## Prerequisites for using the POD Web Service

**Technical knowledge** of web services technology **is an advantage** if you want to use the sample client provided by the Agency, and **a prerequisite** if you want to develop your own client to access the POD Web Service. **Knowledge of XML is essential** if you need to process the data retrieved with POD Web Service.

**System requirements**: calling a web service requires a client software, which we recommend to install on a server.

## Need help?

For more information about Merlin, please visit the Merlin intranet section. For more information about using the POD Web Service contact the IT Support team by filling out the contact form on the Intranet: http://een.ec.europa.eu/my/intranet/contact

Alternatively, you can call the phone number 0032 - (0)2 - 29 - 73939.

---

1. A web service is a technical interface using XML format and a standard protocol called SOAP to exchange information between systems.
2. POD - the Merlin central database where profiles created by the Network Partners are stored.

# 9. POD Web Service System Overview

The Partnering Opportunities Database (POD) is the profiles database in Merlin. To ease the integration of Merlin with Network Partner or third party systems, a web service combined with POD XML allows your current system to communicate with the POD.

The web service is exposed with both SOAP[1] and REST[2] protocols
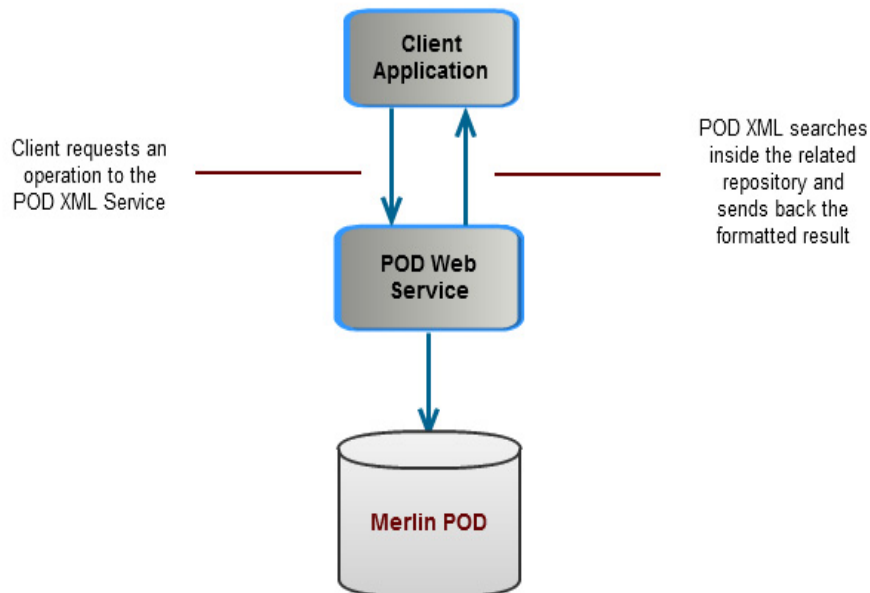


You can use any type of client application, as long as it is compatible with the standard protocols used by the exposed services.

---

1.Please see http://en.wikipedia.org/wiki/SOAP for further information.
2.Please see http://en.wikipedia.org/wiki/REST for further information.

# 10. Using the POD Web Service

A client system is required for accessing the POD Web Service. You can either develop your own client or use the sample client provided by the Agency (see "POD Sample Client").

## Setting up a client system

### Accessing the POD Web service

Use the following URL to connect to the POD Web Service Description Language (WSDL):

http://een.ec.europa.eu/tools/services/podv6/QueryService.svc?wsdl

To access the web service, you need to provide your Partner ID and Pass Key, which can be found in Merlin by navigating to **Partnering > Profiles > Profile Dissemination > POD Web Service.**

## Using the web service

Use the POD Web Service to:

- request profiles via REST or SOAP;
- insert profiles into the POD, via SOAP.

For more information see "POD Web Service Data Model" and "POD Web Service Reference Data".

For contracts see: http://een.ec.europa.eu/tools/services/podv6/QueryService.svc?xsd=xsd4

For endpoints:

- SOAP: http://een.ec.europa.eu/tools/services/soap
- REST: http://een.ec.europa.eu/tools/services

# 11. POD Web Service Data Model

POD Web Service version 6 offers customers new and improved ways to interact with the Merlin POD.

The service offers two contracts allowing users to both retrieve and insert profiles into the POD:

- GetProfiles
- SaveProfile

## GetProfiles

The GetProfiles method is available for SOAP and REST protocols.

### Data structure for SOAP

The SOAP method is an improvement of the POD WS version 5. It differs from the previous version in that the return type is now a list of profile objects, and no longer a string. This enables service consumers to easily interact with data.

### Input parameters

The input parameter consists of an object of type "ProfileQueryRequest" .

### Output parameters

The return type is a list of objects of type "profile".

### Data structure for REST

For easy access to the POD data through HTTP requests, you can use the REST version.

### Input parameters

To call this method you must provide the following set of parameters:

| Parameter | Definition | Comments |
|---|---|---|
| u | username | Partner ID of the user accessing the web service |
| p | password | pass key for the Network Partner above |
| pt | profile type | the type of profile requested; |
| dc | country(ies) of dissemination | profiles targeting these countries |
| db | deadline date before | profiles that expire before this date |
| da | deadline date after | profiles that expire after this date |
| sb | submit date before | profiles submitted before this date |
| sa | submit date after | profiles submitted after this date |
| ub | update date before | profiles updated before this date |
| ua | update date after | profiles updated after this date |
| o | organisation name | profiles belonging to this Network Partner |
| oc | organisation country | profiles issued by organisations established in one of the listed countries |
| pi | partner ID | profiles belonging to this Network Partner |
| pb | published before | profiles published before this date |
| pa | published after | profiles updated after this date |
| ci | consortium ID | profiles belonging to this consortium |

**Note:** It is preferable to use the Partner ID ("pi"), rather than the organisation name ("o") in the request for profiles belonging to a certain organisation, as complex organisation names may cause errors in the search.

### Output parameters

The return type is a stream of data (formatted as an xml document).

## SaveProfile

The SaveProfile method is a new feature added in POD WS version 6, and is available only for SOAP.

### Data structure

### Input parameters

To call this method you must provide the following:

1. An object of type "profileInput" (this class is similar to the 'profile' class returned by the 'GetProfiles' method).
   This makes it fairly easy to map the two objects if needed.
2. An object of type 'credentials' containing the authentication information ("username" and "password") needed to submit the data to POD.

The "username" value is the Partner ID, and the "password value" is the Pass Key.

### Output parameters

The return type is a string and its information is different based on the success/failure of the transaction:

- **success**: confirmation message + POD Reference of the profile + profile internal reference (if specified).
- **failure**: error message returned by the web service.

# 12. POD Web Service Reference Data

In the following tables you will find information about the **correct data format** to use with the POD Web service via **SOAP**.

## Requesting profiles

The POD Web Service can retrieve profiles based on the following search criteria:

- Profile type - e.g. Technology Offer, Business Request, etc.;
- Dissemination countries- target countries indicated in the profile;
- Organisation name- name of Network partner who published the profiles;
- Organisation ID - ID number of the Network partner who published the profiles;
- Organisation country - the country where the Network partner is established;
- Consortium name - name of consortium the partners belong to;
- Submission date - profiles submitted before and/or after this date;
- Update date - profiles modified before and/or after this date;
- Deadline date - profiles that expire before and/or after this date;
- Publishing date - profiles that are published before and/or after this date.

Please refer to the following table for details on the accepted data format:

| Parameter | Description | Data format |
| --- | --- | --- |
| Profile type | Multiple values accepted; | BO, BR, TO, TR, RDR |
| Dissemination countries | Multiple values accepted | ISO 3166-1 alpha-2 |
| Organisation name | Free text | N/A |
| Organisation ID | Multiple values accepted | ISO country code followed by a five-digit number.<br><br>E.g. BE00275 |
| Organisation country | Leave this field empty if you have already specified the organisation, | ISO 3166-1 alpha-2 |
| Consortium Name | Free text | N/A |
| Dates (all types) | | yyyymmdd |

## Inserting a profile

**Note:** When inserting a profile, please make sure that you only fill in the fields relevant to that type of profile, and that the information is not contradictory.

**Stage of Development**

| Merlin Values | POD Client Accepted Format |
|---|---|
| Already on the market | ONMARKET |
| Available for demonstration | FORDEMO |
| Concept stage | CONCSTAG |
| Field tested/evaluated | TESTEVAL |
| Project already started | ALRESTAR |
| Project in negotiations - urgent | INNEGO |
| Proposal under development | PROPINDEV |
| Prototype available for demonstration | PROTFORDEMO |
| Under development/lab tested | PROPINDEVLAB |

**Profile Origin**

This field is not applicable to RDR profiles.

| Merlin Values | POD Client Accepted Format |
|---|---|
| CIP | CIP |
| Eurostars | EUROSTAR |
| FP4 | FP4 |
| FP5 | FP5 |
| FP6 | FP6 |
| FP7 | FP7 |
| National R&D programme | NATR&DPROG |
| Other | OTHER |
| Other European R&D programme | OTHEUROR&DPROG |
| Private (in-house) research | PRIVRESS |
| Regional R&D programme | REGIR&DPROG |

**IPR status**

| Merlin Values | POD Client Accepted Format |
|---|---|
| Copyright | COPY |
| Design Rights | DESIRIGH |
| Exclusive Rights | EXCLRIGH |

| Merlin Values | POD Client Accepted Format |
|---|---|
| Granted patent or patent application essential | GRANPATEESSE |
| Other (registered design, plant variety, etc) | OTHER |
| Patent(s) applied for but not yet granted | NONGRANPATEN |
| Patents granted | GRANPATE |
| Secret Know-how | SECRKHOW |
| Trade Marks | TRADMARK |

## Sector Group

| Merlin Values | POD Client Accepted Format |
|---|---|
| Agrofood | AGRFOO |
| Automotive, Transport and Logistics | AUTTRANSLOG |
| Bio Chem Tech | BIOCHTE |
| Creative Industries | CREAIND |
| Environment | ENVIR |
| Healthcare | HEACAR |
| ICT Industry and Services | ICT |
| Intelligent Energy | INTENRG |
| Maritime Industry and Services | MARINDSERV |
| Materials | MATER |
| Nano- and Microtechnologies | NANOMICRO |
| Services and Retail | SERVRET |
| Space and Aerospace | SCPAEO |
| Sustainable Construction | SUSTCONS |
| Textile and Fashion | TXTFASH |
| Tourism and Cultural Heritage | TRSMCULT |
| Women entrepreneurship | WOMNENTR |

## Type and Size of Client

| Merlin Values | POD Client Accepted Format |
|---|---|
| Industry >500 | 500+ |
| Industry >500 MNE | MME_500+ |
| Industry 250-499 | 250_499 |
| Industry SME <= 10 | SME_10- |
| Industry SME 11-49 | SME_11_49 |
| Industry SME 50-249 | SME_50_249 |
| Other | OTHER |
| Inventor | INVENT |
| R&D Institution | RD |
| University | UNIV |

## Turnover

| Merlin Values | POD Client Accepted Format |
|---|---|
| <1M | 1- |
| >500M | 500+ |
| 1 - 10M | 0101 |
| 10 - 20M | 1020 |
| 100 - 250M | 100250 |
| 20 - 50M | 2050 |
| 250 - 500M | 250500 |
| 50 - 100M | 50100 |

## Already Engaged in Transnational Cooperation

Boolean.

## Certification Standards

| Merlin Values | POD Client Accepted Format | Merlin Values | POD Client Accepted Format |
|---|---|---|---|
| AS 9100 | AS_9100 | EN 690 | EN_690 |
| AZWV | AZWV | EN 71 | EN_71 |
| BS 8901 | BS_8901 | EN 729 | EN_729 |
| DIN 150 | DIN_150 | EN 82967 | EN_82967 |
| DIN 15018 | DIN_15018 | FSC | FSC |
| DIN 18800 | DIN_18800 | GOST R | GOST_R |
| DIN 18800:7 | DIN_18800:7 | IS 01:2009 | IS_01:2009 |
| DIN 4102-B2 | DIN_4102-B2 | IS 02:2009 | IS_02:2009 |
| DIN 51749 | DIN_51749 | IS 03:2009 | IS_03:2009 |
| DIN 6700 | DIN_6700 | ISO 1 | ISO_1 |
| ecoaudit | ECOAUDIT | ISO 1000 | ISO_1000 |
| ECOCERT | ECOCERT | ISO 10006 | ISO_10006 |
| ELOT 13476-3 | ELOT_13476-3 | ISO 10007 | ISO_10007 |
| ELOT 50086-2-4/A1 | ELOT_50086-2-4/A1 | ISO 10012 | ISO_10012 |
| EMAS | EMAS | ISO 10021 | ISO_10021 |
| EN 1176:1-7 | EN_1176:1-7 | ISO 10026 | ISO_10026 |
| EN 12566-3:2005 | EN_12566-3:2005 | ISO 1004 | ISO_1004 |
| EN 12828 | EN_12828 | ISO 1007 135 | ISO_1007_135 |
| EN 13501-1 | EN_13501-1 | ISO 10077 | ISO_10077 |
| EN 13823 | EN_13823 | ISO 10089 | ISO_10089 |
| EN 1853 | EN_1853 | ISO 10160 | ISO_10160 |
| EN 303-5 | EN_303-5 | ISO 10161 | ISO_10161 |
| EN 50086 | EN_50086 | ISO 10164 | ISO_10164 |
| EN 60974-11 | EN_60974-11 | ISO 10179:1996 | ISO_10179:1996 |
| | | ISO 10202:1991 | ISO_10202:1991 |

| Merlin Values | POD Client Accepted Format | Merlin Values | POD Client Accepted Format |
|---|---|---|---|
| ISO 10206 | ISO_10206 | ISO 11172 | ISO_11172 |
| ISO 10211 | ISO_10211 | ISO 11179 | ISO_11179 |
| ISO 10279 | ISO_10279 | ISO 11179-1:2004 | ISO_11179-1:2004 |
| ISO 1028 | ISO_1028 | ISO 11179-2:2005 | ISO_11179-2:2005 |
| ISO 10303 | ISO_10303 | ISO 11179-3:2003 | ISO_11179-3:2003 |
| ISO 10383 | ISO_10383 | ISO 11179-4:2004 | ISO_11179-4:2004 |
| ISO 10487 | ISO_10487 | ISO 11179-5:2005 | ISO_11179-5:2005 |
| ISO 10628 | ISO_10628 | ISO 11179-6:2005 | ISO_11179-6:2005 |
| ISO 10646 | ISO_10646 | ISO 11180 | ISO_11180 |
| ISO 10664 | ISO_10664 | ISO 11404:1996 | ISO_11404:1996 |
| ISO 10957 | ISO_10957 | ISO 11446:2004 | ISO_11446:2004 |
| ISO 10962 | ISO_10962 | ISO 11469:2000 | ISO_11469:2000 |
| ISO 10993 | ISO_10993 | ISO 11521 | ISO_11521 |
| ISO 10993-1:2008 | ISO_10993-1:2008 | ISO 11578:1996 | ISO_11578:1996 |
| ISO 10993-10 | ISO_10993-10 | ISO 11783 | ISO_11783 |
| ISO 10993-11 | ISO_10993-11 | ISO 11801 | ISO_11801 |
| ISO 10993-12:2007 | ISO_10993-12:2007 | ISO 11898 | ISO_11898 |
| ISO 10993-13 | ISO_10993-13 | ISO 11925-2 | ISO_11925-2 |
| ISO 10993-14 | ISO_10993-14 | ISO 12006 | ISO_12006 |
| ISO 10993-15 | ISO_10993-15 | ISO 12207 | ISO_12207 |
| ISO 10993-16 | ISO_10993-16 | ISO 12639 | ISO_12639 |
| ISO 10993-17 | ISO_10993-17 | ISO 12641 | ISO_12641 |
| ISO 10993-18 | ISO_10993-18 | ISO 128 | ISO_128 |
| ISO 10993-19 | ISO_10993-19 | ISO 13239 | ISO_13239 |
| ISO 10993-2 | ISO_10993-2 | ISO 13249 | ISO_13249 |
| ISO 10993-20:2006 | ISO_10993-20:2006 | ISO 13250 | ISO_13250 |
| ISO 10993-3 | ISO_10993-3 | ISO 13346 | ISO_13346 |
| ISO 10993-4 | ISO_10993-4 | ISO 13370 | ISO_13370 |
| ISO 10993-5 | ISO_10993-5 | ISO 13406 | ISO_13406 |
| ISO 10993-5:1999 | ISO_10993-5:1999 | ISO 13406-1:1999 | ISO_13406-1:1999 |
| ISO 10993-6:2007 | ISO_10993-6:2007 | ISO 13406-2:1002 | ISO_13406-2:1002 |
| ISO 10993-7:2008 | ISO_10993-7:2008 | ISO 13407:1999 | ISO_13407:1999 |
| ISO 10993-8 | ISO_10993-8 | ISO 13450 110 | ISO_13450_110 |
| ISO 10993-9:2007 | ISO_10993-9:2007 | ISO 13485 | ISO_13485 |
| ISO 11064 | ISO_11064 | ISO 13485:2001 | ISO_13485:2001 |
| ISO 11064-1:2000 | ISO_11064-1:2000 | ISO 13485:2003 | ISO_13485:2003 |
| ISO 11064-2:2000 | ISO_11064-2:2000 | ISO 13485:2004 | ISO_13485:2004 |
| ISO 11064-3:1999 | ISO_11064-3:1999 | ISO 13490 | ISO_13490 |
| ISO 11064-4:2004 | ISO_11064-4:2004 | ISO 13567 | ISO_13567 |
| ISO 11064-5:2008 | ISO_11064-5:2008 | ISO 13568:2002 | ISO_13568:2002 |
| ISO 11064-6:2005 | ISO_11064-6:2005 | ISO 13616 | ISO_13616 |
| ISO 11064-7:2006 | ISO_11064-7:2006 | ISO 13628 | ISO_13628 |
| ISO 11170:2003 | ISO_11170:2003 | ISO 13628-1 | ISO_13628-1 |

| Merlin Values | POD Client Accepted Format | Merlin Values | POD Client Accepted Format |
|---|---|---|---|
| ISO 13628-10 | ISO_13628-10 | ISO 14750 | ISO_14750 |
| ISO 13628-11 | ISO_13628-11 | ISO 14755 | ISO_14755 |
| ISO 13628-2 | ISO_13628-2 | ISO 14855-1:2005 | ISO_14855-1:2005 |
| ISO 13628-3 | ISO_13628-3 | ISO 14855-2:2007 | ISO_14855-2:2007 |
| ISO 13628-4 | ISO_13628-4 | ISO 14882 | ISO_14882 |
| ISO 13628-5 | ISO_13628-5 | ISO 14915 | ISO_14915 |
| ISO 13628-6 | ISO_13628-6 | ISO 14915-1:2002 | ISO_14915-1:2002 |
| ISO 13628-7 | ISO_13628-7 | ISO 14915-2:2003 | ISO_14915-2:2003 |
| ISO 13628-8 | ISO_13628-8 | ISO 14915-3:2002 | ISO_14915-3:2002 |
| ISO 13628-9 | ISO_13628-9 | ISO 14971:2007 | ISO_14971:2007 |
| ISO 13818 | ISO_13818 | ISO 14977 | ISO_14977 |
| ISO 13837 | ISO_13837 | ISO 15000 | ISO_15000 |
| ISO 13849-1 | ISO_13849-1 | ISO 15000-1:2004 | ISO_15000-1:2004 |
| ISO 1400 | ISO_1400 | ISO 15000-2:2004 | ISO_15000-2:2004 |
| ISO 14000 | ISO_14000 | ISO 15000-3:2004 | ISO_15000-3:2004 |
| ISO 14001 | ISO_14001 | ISO 15000-4:2004 | ISO_15000-4:2004 |
| ISO 14001:1996 | ISO_14001:1996 | ISO 15000-5:2005 | ISO_15000-5:2005 |
| ISO 14001:2004 | ISO_14001:2004 | ISO 15022 | ISO_15022 |
| ISO 14001:2005 | ISO_14001:2005 | ISO 15028 | ISO_15028 |
| ISO 1401:2004 | ISO_1401:2004 | ISO 15082 | ISO_15082 |
| ISO 14064 | ISO_14064 | ISO 15099 | ISO_15099 |
| ISO 14223 | ISO_14223 | ISO 15112 | ISO_15112 |
| ISO 14230 | ISO_14230 | ISO 15189 | ISO_15189 |
| ISO 14230-1 | ISO_14230-1 | ISO 15288 | ISO_15288 |
| ISO 14230-2 | ISO_14230-2 | ISO 15289 | ISO_15289 |
| ISO 14230-3 | ISO_14230-3 | ISO 15291 | ISO_15291 |
| ISO 14230-4 | ISO_14230-4 | ISO 1539 | ISO_1539 |
| ISO 14443 | ISO_14443 | ISO 15403 | ISO_15403 |
| ISO 14496 | ISO_14496 | ISO 15403-1 | ISO_15403-1 |
| ISO 14644 | ISO_14644 | ISO 15408 | ISO_15408 |
| ISO 14644-1:1999 | ISO_14644-1:1999 | ISO 15434 | ISO_15434 |
| ISO 14644-2:2000 | ISO_14644-2:2000 | ISO 15444 | ISO_15444 |
| ISO 14644-3:2005 | ISO_14644-3:2005 | ISO 15445:2000 | ISO_15445:2000 |
| ISO 14644-4:2001 | ISO_14644-4:2001 | ISO 15504 | ISO_15504 |
| ISO 14644-5:2004 | ISO_14644-5:2004 | ISO 15614-13:2002 | ISO_15614-13:2002 |
| ISO 14644-6:2007 | ISO_14644-6:2007 | ISO 15686 | ISO_15686 |
| ISO 14644-7:2004 | ISO_14644-7:2004 | ISO 15693 | ISO_15693 |
| ISO 14644-8:2006 | ISO_14644-8:2006 | ISO 15706 | ISO_15706 |
| ISO 14644-9 | ISO_14644-9 | ISO 15707 | ISO_15707 |
| ISO 14651 | ISO_14651 | ISO 15836 | ISO_15836 |
| ISO 14698 | ISO_14698 | ISO 15897 | ISO_15897 |
| ISO 14698-1 | ISO_14698-1 | ISO 15924 | ISO_15924 |
| ISO 14698-2 | ISO_14698-2 | ISO 15930 | ISO_15930 |

| Merlin Values | POD Client Accepted Format | Merlin Values | POD Client Accepted Format |
|---|---|---|---|
| ISO 15948:2003 | ISO_15948:2003 | ISO 18013 | ISO_18013 |
| ISO 15970 | ISO_15970 | ISO 18013-1:2005 | ISO_18013-1:2005 |
| ISO 15971 | ISO_15971 | ISO 18013-2:2008 | ISO_18013-2:2008 |
| ISO 16:1975 | ISO_16:1975 | ISO 18013-3:2009 | ISO_18013-3:2009 |
| ISO 16:949 | ISO_16:949 | ISO 18014 | ISO_18014 |
| ISO 16071:2003 | ISO_16071:2003 | ISO 18023-1:2006 | ISO_18023-1:2006 |
| ISO 16134 | ISO_16134 | ISO 18023-2:2006 | ISO_18023-2:2006 |
| ISO 16232 | ISO_16232 | ISO 18023-3:2006 | ISO_18023-3:2006 |
| ISO 16232-10 | ISO_16232-10 | ISO 18023:2006 | ISO_18023:2006 |
| ISO 16232-8 | ISO_16232-8 | ISO 18024-4:2006 | ISO_18024-4:2006 |
| ISO 16232-9 | ISO_16232-9 | ISO 18025:2005 | ISO_18025:2005 |
| ISO 16262 | ISO_16262 | ISO 18026:2006 | ISO_18026:2006 |
| ISO 1629 | ISO_1629 | ISO 18033 | ISO_18033 |
| ISO 16500 | ISO_16500 | ISO 18033-1 | ISO_18033-1 |
| ISO 16549 | ISO_16549 | ISO 18033-2 | ISO_18033-2 |
| ISO 16750 | ISO_16750 | ISO 18033-3 | ISO_18033-3 |
| ISO 16949 | ISO_16949 | ISO 18033-4 | ISO_18033-4 |
| ISO 16949:2000:200 | ISO_16949:2000:200 | ISO 18041-4:2005 | ISO_18041-4:2005 |
| ISO 16949:2002 | ISO_16949:2002 | ISO 18042-4:2006 | ISO_18042-4:2006 |
| ISO 16982:2002 | ISO_16982:2002 | ISO 18152:2003 | ISO_18152:2003 |
| ISO 17020:1998 | ISO_17020:1998 | ISO 18185 | ISO_18185 |
| ISO 17024:2003 | ISO_17024:2003 | ISO 18245 | ISO_18245 |
| ISO 17025 | ISO_17025 | ISO 18529:2000 | ISO_18529:2000 |
| ISO 17025:1999 | ISO_17025:1999 | ISO 18629 | ISO_18629 |
| ISO 17202 | ISO_17202 | ISO 19005 | ISO_19005 |
| ISO 1745 | ISO_1745 | ISO 19011 | ISO_19011 |
| ISO 1750 | ISO_1750 | ISO 19092-1 | ISO_19092-1 |
| ISO 17776 | ISO_17776 | ISO 19092-2 | ISO_19092-2 |
| ISO 17799 | ISO_17799 | ISO 19101 | ISO_19101 |
| ISO 1789 | ISO_1789 | ISO 19105 | ISO_19105 |
| ISO 17894 | ISO_17894 | ISO 19107 | ISO_19107 |
| ISO 18000 | ISO_18000 | ISO 19108 | ISO_19108 |
| ISO 18000-1 | ISO_18000-1 | ISO 19109 | ISO_19109 |
| ISO 18000-2 | ISO_18000-2 | ISO 19110 | ISO_19110 |
| ISO 18000-3 | ISO_18000-3 | ISO 19111 | ISO_19111 |
| ISO 18000-4 | ISO_18000-4 | ISO 19113 | ISO_19113 |
| ISO 18000-5 | ISO_18000-5 | ISO 19114 | ISO_19114 |
| ISO 18000-6 | ISO_18000-6 | ISO 19115 | ISO_19115 |
| ISO 18000-7 | ISO_18000-7 | ISO 19123 | ISO_19123 |
| ISO 18001 | ISO_18001 | ISO 19128 | ISO_19128 |
| ISO 18001:14001 | ISO_18001:14001 | ISO 19131 | ISO_19131 |
| ISO 18004 | ISO_18004 | ISO 19136 | ISO_19136 |
| ISO 18009 | ISO_18009 | ISO 19439 | ISO_19439 |

| Merlin Values | POD Client Accepted Format | Merlin Values | POD Client Accepted Format |
|---|---|---|---|
| ISO 19440 | ISO_19440 | ISO 22241-1 | ISO_22241-1 |
| ISO 19501 | ISO_19501 | ISO 22241-2 | ISO_22241-2 |
| ISO 19502 | ISO_19502 | ISO 22241-3 | ISO_22241-3 |
| ISO 19503 | ISO_19503 | ISO 22250 | ISO_22250 |
| ISO 19757 | ISO_19757 | ISO 22250-1:2002 | ISO_22250-1:2002 |
| ISO 19757-2 | ISO_19757-2 | ISO 22399:2007 | ISO_22399:2007 |
| ISO 19757-3 | ISO_19757-3 | ISO 2242 | ISO_2242 |
| ISO 19757-4 | ISO_19757-4 | ISO 226 | ISO_226 |
| ISO 19770 | ISO_19770 | ISO 226:2003 | ISO_226:2003 |
| ISO 19785 | ISO_19785 | ISO 22716:2007 | ISO_22716:2007 |
| ISO 19790 | ISO_19790 | ISO 228-1 | ISO_228-1 |
| ISO 19794 | ISO_19794 | ISO 2281 | ISO_2281 |
| ISO 19794-1:2006 | ISO_19794-1:2006 | ISO 23003-1 | ISO_23003-1 |
| ISO 19794-10:2007 | ISO_19794-10:2007 | ISO 23270:2003 | ISO_23270:2003 |
| ISO 19794-2:2005 | ISO_19794-2:2005 | ISO 233-2:1993 | ISO_233-2:1993 |
| ISO 19794-3:2006 | ISO_19794-3:2006 | ISO 233:1984 | ISO_233:1984 |
| ISO 19794-4:2005 | ISO_19794-4:2005 | ISO 23360 | ISO_23360 |
| ISO 19794-5:2005 | ISO_19794-5:2005 | ISO 23360-1 | ISO_23360-1 |
| ISO 19794-6:2005 | ISO_19794-6:2005 | ISO 23360-2 | ISO_23360-2 |
| ISO 19794-7:2007 | ISO_19794-7:2007 | ISO 23360-3 | ISO_23360-3 |
| ISO 19794-8:2006 | ISO_19794-8:2006 | ISO 23360-4 | ISO_23360-4 |
| ISO 19794-9:2007 | ISO_19794-9:2007 | ISO 23360-5 | ISO_23360-5 |
| ISO 2 | ISO_2 | ISO 23360-6 | ISO_23360-6 |
| ISO 2000 | ISO_2000 | ISO 23360-7 | ISO_23360-7 |
| ISO 20000:2005 | ISO_20000:2005 | ISO 23360-8 | ISO_23360-8 |
| ISO 2001:2000 | ISO_2001:2000 | ISO 23733 | ISO_23733 |
| ISO 20022 | ISO_20022 | ISO 23950 | ISO_23950 |
| ISO 2022 | ISO_2022 | ISO 24727 | ISO_24727 |
| ISO 20943 | ISO_20943 | ISO 24727-1 | ISO_24727-1 |
| ISO 20943-1:2003 | ISO_20943-1:2003 | ISO 24727-2 | ISO_24727-2 |
| ISO 20943-3:2004 | ISO_20943-3:2004 | ISO 24727-3 | ISO_24727-3 |
| ISO 2108 | ISO_2108 | ISO 24727-4 | ISO_24727-4 |
| ISO 2145 | ISO_2145 | ISO 24727-5 | ISO_24727-5 |
| ISO 21482 | ISO_21482 | ISO 24727-6 | ISO_24727-6 |
| ISO 216 | ISO_216 | ISO 24744:2007 | ISO_24744:2007 |
| ISO 2162 | ISO_2162 | ISO 24762:2008 | ISO_24762:2008 |
| ISO 2171 | ISO_2171 | ISO 2533 | ISO_2533 |
| ISO 22000 | ISO_22000 | ISO 259-2:1994 | ISO_259-2:1994 |
| ISO 22000:2005 | ISO_22000:2005 | ISO 259:1984 | ISO_259:1984 |
| ISO 22003 | ISO_22003 | ISO 25961 | ISO_25961 |
| ISO 22005 | ISO_22005 | ISO 26000 | ISO_26000 |
| ISO 22093 | ISO_22093 | ISO 261 | ISO_261 |
| ISO 22241 | ISO_22241 | ISO 262 | ISO_262 |

| Merlin Values | POD Client Accepted Format | Merlin Values | POD Client Accepted Format |
|---|---|---|---|
| ISO 26300 | ISO_26300 | ISO 3601-1 | ISO_3601-1 |
| ISO 2636 | ISO_2636 | ISO 3601-2 | ISO_3601-2 |
| ISO 27000 | ISO_27000 | ISO 3601-4 | ISO_3601-4 |
| ISO 27001 | ISO_27001 | ISO 3602 | ISO_3602 |
| ISO 27002 | ISO_27002 | ISO 361 | ISO_361 |
| ISO 27003 | ISO_27003 | ISO 3632 | ISO_3632 |
| ISO 27004 | ISO_27004 | ISO 3635:1981 | ISO_3635:1981 |
| ISO 27005 | ISO_27005 | ISO 3834-2 | ISO_3834-2 |
| ISO 27006 | ISO_27006 | ISO 38500 | ISO_38500 |
| ISO 27007 | ISO_27007 | ISO 3864 | ISO_3864 |
| ISO 27011 | ISO_27011 | ISO 3901 | ISO_3901 |
| ISO 2709 | ISO_2709 | ISO 3977 | ISO_3977 |
| ISO 2768 | ISO_2768 | ISO 4 | ISO_4 |
| ISO 28000 | ISO_28000 | ISO 4064 | ISO_4064 |
| ISO 28004 | ISO_28004 | ISO 4074 | ISO_4074 |
| ISO 29119 | ISO_29119 | ISO 4157 | ISO_4157 |
| ISO 29119-1 | ISO_29119-1 | ISO 4157-1 | ISO_4157-1 |
| ISO 29119-2 | ISO_29119-2 | ISO 4157-2 | ISO_4157-2 |
| ISO 29119-3 | ISO_29119-3 | ISO 4157-3 | ISO_4157-3 |
| ISO 29119-4 | ISO_29119-4 | ISO 4179 | ISO_4179 |
| ISO 29500 | ISO_29500 | ISO 4217 | ISO_4217 |
| ISO 29500-1 | ISO_29500-1 | ISO 4628 | ISO_4628 |
| ISO 29500-2 | ISO_29500-2 | ISO 4628-1 | ISO_4628-1 |
| ISO 29500-3 | ISO_29500-3 | ISO 4628-3 | ISO_4628-3 |
| ISO 29500-4 | ISO_29500-4 | ISO 4873:1991 8 | ISO_4873:1991_8 |
| ISO 3 | ISO_3 | ISO 4892 | ISO_4892 |
| ISO 3029 126 | ISO_3029_126 | ISO 500 | ISO_500 |
| ISO 3082 | ISO_3082 | ISO 5167 | ISO_5167 |
| ISO 3098 | ISO_3098 | ISO 5167-1 | ISO_5167-1 |
| ISO 31 | ISO_31 | ISO 5167-2 | ISO_5167-2 |
| ISO 31000 | ISO_31000 | ISO 5167-3 | ISO_5167-3 |
| ISO 3103 | ISO_3103 | ISO 5167-4 | ISO_5167-4 |
| ISO 3166 | ISO_3166 | ISO 5218 | ISO_5218 |
| ISO 3166-1 | ISO_3166-1 | ISO 5455 | ISO_5455 |
| ISO 3166-2 | ISO_3166-2 | ISO 5457 | ISO_5457 |
| ISO 3166-3 | ISO_3166-3 | ISO 5775 | ISO_5775 |
| ISO 32000 | ISO_32000 | ISO 5800 | ISO_5800 |
| ISO 3297 | ISO_3297 | ISO 5964 | ISO_5964 |
| ISO 3506 | ISO_3506 | ISO 5971:1981 | ISO_5971:1981 |
| ISO 3536 | ISO_3536 | ISO 6166 | ISO_6166 |
| ISO 3537 | ISO_3537 | ISO 6194 | ISO_6194 |
| ISO 3538 | ISO_3538 | ISO 6194-5 | ISO_6194-5 |
| ISO 3601 | ISO_3601 | ISO 6336 | ISO_6336 |

| Merlin Values | POD Client Accepted Format | Merlin Values | POD Client Accepted Format |
|---|---|---|---|
| ISO 6344 | ISO_6344 | ISO 8180 | ISO_8180 |
| ISO 6344-1 | ISO_6344-1 | ISO 8373 | ISO_8373 |
| ISO 6344-2 | ISO_6344-2 | ISO 838 | ISO_838 |
| ISO 6344-3 | ISO_6344-3 | ISO 8402 | ISO_8402 |
| ISO 639 | ISO_639 | ISO 843:1997 | ISO_843:1997 |
| ISO 639-1 | ISO_639-1 | ISO 8501-1 | ISO_8501-1 |
| ISO 639-2 | ISO_639-2 | ISO 8555 | ISO_8555 |
| ISO 639-3 | ISO_639-3 | ISO 8559:1989 | ISO_8559:1989 |
| ISO 639-5 | ISO_639-5 | ISO 8583 | ISO_8583 |
| ISO 6429 | ISO_6429 | ISO 8583-1 | ISO_8583-1 |
| ISO 6438 | ISO_6438 | ISO 8583-2 | ISO_8583-2 |
| ISO 646 | ISO_646 | ISO 8583-3 | ISO_8583-3 |
| ISO 65 | ISO_65 | ISO 860 | ISO_860 |
| ISO 657 | ISO_657 | ISO 8601 | ISO_8601 |
| ISO 6579 | ISO_6579 | ISO 8613 | ISO_8613 |
| ISO 6594 | ISO_6594 | ISO 8632 | ISO_8632 |
| ISO 668 | ISO_668 | ISO 8651 | ISO_8651 |
| ISO 6709 | ISO_6709 | ISO 8652 | ISO_8652 |
| ISO 68-1 | ISO_68-1 | ISO 8653:1986 | ISO_8653:1986 |
| ISO 68-2 | ISO_68-2 | ISO 8805 | ISO_8805 |
| ISO 690 | ISO_690 | ISO 8806-4 | ISO_8806-4 |
| ISO 6946 | ISO_6946 | ISO 8807 | ISO_8807 |
| ISO 7 | ISO_7 | ISO 8824 | ISO_8824 |
| ISO 7001 | ISO_7001 | ISO 8825 | ISO_8825 |
| ISO 7002 | ISO_7002 | ISO 8859-1 | ISO_8859-1 |
| ISO 704 | ISO_704 | ISO 8859-10 | ISO_8859-10 |
| ISO 7098 | ISO_7098 | ISO 8859-11 | ISO_8859-11 |
| ISO 7200 | ISO_7200 | ISO 8859-13 | ISO_8859-13 |
| ISO 729-2:1997 | ISO_729-2:1997 | ISO 8859-14 | ISO_8859-14 |
| ISO 732 | ISO_732 | ISO 8859-15 | ISO_8859-15 |
| ISO 7372 | ISO_7372 | ISO 8859-16 | ISO_8859-16 |
| ISO 7501-1:1997 | ISO_7501-1:1997 | ISO 8859-2 | ISO_8859-2 |
| ISO 764 | ISO_764 | ISO 8859-3 | ISO_8859-3 |
| ISO 7736 | ISO_7736 | ISO 8859-4 | ISO_8859-4 |
| ISO 7810 | ISO_7810 | ISO 8859-5 | ISO_8859-5 |
| ISO 7811 | ISO_7811 | ISO 8859-6 | ISO_8859-6 |
| ISO 7812 | ISO_7812 | ISO 8859-7 | ISO_8859-7 |
| ISO 7813 | ISO_7813 | ISO 8859-8 | ISO_8859-8 |
| ISO 7816 | ISO_7816 | ISO 8859-9 | ISO_8859-9 |
| ISO 7942 | ISO_7942 | ISO 8879 | ISO_8879 |
| ISO 8000 | ISO_8000 | ISO 898 | ISO_898 |
| ISO 80000 | ISO_80000 | ISO 898-1 | ISO_898-1 |
| ISO 8090 | ISO_8090 | ISO 898-2 | ISO_898-2 |

| Merlin Values | POD Client Accepted Format | Merlin Values | POD Client Accepted Format |
|---|---|---|---|
| ISO 898-5 | ISO_898-5 | ISO 965-1 | ISO_965-1 |
| ISO 898-6 | ISO_898-6 | ISO 965-2 | ISO_965-2 |
| ISO 898-7 | ISO_898-7 | ISO 965-3 | ISO_965-3 |
| ISO 9 | ISO_9 | ISO 965-4 | ISO_965-4 |
| ISO 900:9001:2000 | ISO_900:9001:2000 | ISO 965-5 | ISO_965-5 |
| ISO 9000 | ISO_9000 | ISO 9660 | ISO_9660 |
| ISO 9000:2000 | ISO_9000:2000 | ISO 9796 | ISO_9796 |
| ISO 9000:2001 | ISO_9000:2001 | ISO 9797 | ISO_9797 |
| ISO 9000:2008 | ISO_9000:2008 | ISO 9798 | ISO_9798 |
| ISO 9001 | ISO_9001 | ISO 9834 | ISO_9834 |
| ISO 9001:00 | ISO_9001:00 | ISO 9869 | ISO_9869 |
| ISO 9001:14000 | ISO_9001:14000 | ISO 9899 | ISO_9899 |
| ISO 9001:1994 | ISO_9001:1994 | ISO 9901 | ISO_9901 |
| ISO 9001:200 | ISO_9001:200 | ISO 9945 | ISO_9945 |
| ISO 9001:2000 | ISO_9001:2000 | ISO 9984 | ISO_9984 |
| ISO 9001:2001 | ISO_9001:2001 | ISO 9985 | ISO_9985 |
| ISO 9001:2002 | ISO_9001:2002 | ISO 999 | ISO_999 |
| ISO 9001:2004 | ISO_9001:2004 | ISO 9992:1999 | ISO_9992:1999 |
| ISO 9001:2008 | ISO_9001:2008 | ISO 9999 | ISO_9999 |
| ISO 9001:95:16 | ISO_9001:95:16 | MGIP 404:16 | MGIP_404:16 |
| ISO 9002 | ISO_9002 | MGIP 404:2 | MGIP_404:2 |
| ISO 9002:1994 | ISO_9002:1994 | none | NONE |
| ISO 9002:1995 | ISO_9002:1995 | OHSAS 1800 | OHSAS_1800 |
| ISO 9002:2000 | ISO_9002:2000 | OHSAS 18001 | OHSAS_18001 |
| ISO 9002:94 | ISO_9002:94 | OHSAS 18001:2007 | OHSAS_18001:2007 |
| ISO 901:1994 | ISO_901:1994 | other | OTHER |
| ISO 9069 | ISO_9069 | PEFC | PEFC |
| ISO 9075 | ISO_9075 | Q4 label | Q4_LABEL |
| ISO 9126 | ISO_9126 | Qualibat 1412 | QUALIBAT_1412 |
| ISO 9141 | ISO_9141 | SA 8000 | SA_8000 |
| ISO 9141-2 | ISO_9141-2 | SO 9001 | SO_9001 |
| ISO 9241 | ISO_9241 | SO 9002 | SO_9002 |
| ISO 9362 | ISO_9362 | SO 9002:2000 | SO_9002:2000 |
| ISO 9407 | ISO_9407 | SPWG 3.5 | SPWG_3.5 |
| ISO 9541 | ISO_9541 | TCO 99/ 03/ 05 | TCO__99/_03/_05 |
| ISO 9541-1:1991 | ISO_9541-1:1991 | TS 16949 | TS_16949 |
| ISO 9541-2:1991 | ISO_9541-2:1991 | TS 16949:2002 | TS_16949:2002 |
| ISO 9541-3:1994 | ISO_9541-3:1994 | TSE 54 | TSE_54 |
| ISO 9564 | ISO_9564 | TSE 9809 | TSE_9809 |
| ISO 9579 | ISO_9579 | VESA FPDM 2.0 | VESA_FPDM_2.0 |
| ISO 9592 | ISO_9592 | | |
| ISO 9594 | ISO_9594 | | |
| ISO 965 | ISO_965 | | |

**Profile is open for EOI**

Boolean.

**Type and Size of Partner Sought**

| Merlin Values | POD Client Accepted Format |
|---|---|
| >500 | 500+ |
| >500 MNE | MNE500 |
| 251-500 | 251_500 |
| Inventor | INVENT |
| R&D Institution | RD |
| SME <10 | SME_10- |
| SME 11-50 | SME_11_50 |
| SME 51-250 | SME_51_250 |
| SME 51-250 | SME_51_250 |

**Type of Partnership Considered**

| Merlin Values | POD Client Accepted Format |
|---|---|
| Acquisition agreement | ACQ |
| Commercial agency agreement | COMAGE |
| Commercial agreement with technical assistance | CWTA |
| Distribution services agreement | DISSER |
| Financial agreement | FIN |
| Franchise agency agreement | FRAAGE |
| Joint venture agreement | JOIVEN |
| License agreement | LIC |
| Manufacturing agreement | MAN |
| Outsourcing agreement | OUT |
| Reciprocal production | REC |
| Research cooperation agreement | RESCOO |
| Services agreement | SER |
| Subcontracting | SUB |
| Technical cooperation agreement | TECCOO |

**Framework Programme (RDR profiles only)**

| Merlin Values | POD Client Accepted Format |
|---|---|
| Life-long training | LIFTRAI |
| Digital Content | DIGCONT |
| ERC | ERC |

| Merlin Values | POD Client Accepted Format |
|---|---|
| International dimension | INTDIM |
| Capacities | CAPA |
| Space | SPACE |
| Research infrastructures | RESINFRA |
| Open innovation for Internet-enabled services | OPINNWWWSERV |
| Security | SEC |
| Entrepreneurship and Innovation Programme | ENTINNPROG |
| Foster energy efficiency and the rational use of energy resources | FOSENRGRESS |
| Nanosciences, nanotechnologies, materials & new production technologies | NANOTECH |
| Information Communication Technologies Policy Support Programme | ICTPOLPROG |
| Industry academia | INDACA |
| Ideas | IDEAS |
| Research for the benefit of SMEs | RESBENSME |
| The Intelligent Energy Europe Programme | INTELENRGEP |
| Initial training | INITTRAIN |
| Food, Agriculture and Fisheries, Biotechnology | FOOAGRFISBIO |
| Coordination of Research Activities | COORDRESACTI |
| Information & Communication technologies | ICT |
| Research potential of Convergence Regions | RESCONVREG |
| Integrated initiatives | INTGINITV |
| People | PEOPLE |
| Competitiveness and Innovation Framework Programme (CIP) | CIP |
| Cooperation | COOP |
| International cooperation | INTCOOP |
| Energy | ENRG |
| Support to innovation | SUPINN |
| Business and innovation services | BUSINNSRV |
| Innovative government and public services | INNGOVPUBSRV |
| Specific actions | SPEFACT |
| Joint Technology Initiatives | JOITECINIT |
| Promote energy efficiency and the use of new and renewable energy sources in transport | RENEWNRG |
| Socio-economic Sciences and the Humanities | SOCHUMSCI |
| Environment (including Climate Change) | ENVIR |
| Eureka | EUREKA |
| Promote new and renewable energy resources | RENNRGRESS |
| ICT for health, ageing well and inclusion | ICTHEAL |
| ICT for a low carbon economy and smart mobility | ICTCARBECO |
| Regions of knowledge | REGKNOW |
| Science in society | SCINSOC |
| Support to the coherent development of research policies | SUPCOHDEVRESPOL |
| Access to finance | ACCFIN |
| Support to eco-innovation | SUPECOINN |
| Transport (including aeronautics) | TRSP |

| Merlin Values | POD Client Accepted Format |
|---|---|
| Seventh Framework Programme (FP7) | FP7 |
| Health | HEALTH |
| Promotion of Entrepreneurship | PROMENTR |

**Coordinator Required (RDR profiles only)**

Boolean.

**Funding Scheme (RDR profiles only)**

| Merlin Values | POD Client Accepted Format |
|---|---|
| Research for the benefit of specific groups (in particular SMEs) | RESEBENE |
| Collaborative projects | COLLPROJ |
| Support for training and career development of researchers | SUPPTRAIDEVPRESS |
| Coordination and support actions | COOSUPACT |
| Networks of Excellence | NETWEXCE |
| Individual projects: Support for "frontier" research | INDIPROJ |

# 13. POD Sample Client

A sample .NET client application is available to enable Network partners to test the web service. The client can be used both to retrieve and to insert profiles from/into Merlin POD.

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**Note:** The application is provided 'as is', without any license and without any guarantee.

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**Prerequisites**:

- Make sure you are logged in as an administrator or a user with administrator rights on your computer.
- If your organisation uses a proxy, you must configure Internet Explorer so that the proxy is no longer used.

**Installing the client application**

1. Go to the Enterprise European Network intranet page http://een.ec.europa.eu/my/intranet/pod-web-service and click on "Executable version" to download the client.
2. Save the file *PODClient.zip* on your local computer and extract it.
3. In the extracted folder, open the *PODClient* file.
4. You are now ready to use the application. You can switch between the interfaces to insert or retrieve profiles at any time, by selecting the **SaveProfile(SOAP)** or the **GetProfiles(SOAP)** option, respectively.

## Retrieving profiles from Merlin

To retrieve profiles from Merlin POD, select **GetProfiles(SOAP)** in the application header.



Specify your **Partner ID** and your **Pass Key**, otherwise you will not be able to request profiles. You can find these credentials by navigating to **Merlin Partnering > Profiles > Profile Dissemination > POD Web Service**. They are saved when you switch between the **Get** and **Save** interfaces, so that you do not need to type them for every operation. However, the credentials are erased when you click the **Reset** button.

Fill in the desired fields in the form and press the **Get** button. Please refer to the following table for more information about each field.

| Field | Comments |
|---|---|
| Profile type(s) | Choose one or more of the following values: BO, BR, TO, TR, RDR. <br> This field cannot be empty. |
| Countries for Dissemination | Multiple values accepted; <br> Data format: ISO 3166-1 alpha-2. |
| Organisation name | Free text |
| Organisation country | Data format: ISO 3166-1 alpha-2 |
| Organisation ID | Multiple values accepted (e.g. if you are requesting profiles published by several organisations). <br><br> The ID is composed of the ISO country code of the organisation followed by a five-digit number. E.g. BE00275 |
| Consortium Name | Free text |
| Dates (all types) | Data format: yyyymmdd |

**Note:** Use the **semicolon (;)** - with or without spaces - to separate values in the fields that accept multiple values.

**Example**: For a profile that targets Croatia and France, the **Countries of Dissemination** field would contain the values: "HR; FR" or "HR;FR".

The POD Web service retrieves the xml files matching your request in a folder named "extracted". The folder will be created in the same location as the *PODClient* file.

Every time you make a request for profiles, the previous xml file is replaced **(without notification)** with an xml containing the latest results. Therefore, to avoid losing your work, make sure you rename or save your xml files into a different location after each request.

To make a new request, press **Reset** to erase the current data and repeat the above instructions.

## Inserting profiles in Merlin

Profiles can only be inserted one by one into Merlin, regardless of the client that is used.

To insert a profile in Merlin POD, select the **SaveProfile(SOAP)** option in the application header.



Specify your **Partner ID** and your **Pass Key**, otherwise you cannot save your profile in Merlin. You can find these credentials by navigating to **Merlin Partnering > Profiles > Profile Dissemination > POD Web Service**. They are saved when you switch between the **Get** and **Save** interfaces, so that you do not need to type them for every operation. However, the credentials are erased when you click the **Reset** button.

Fill in the form and click the **Save** button to insert the profile information in Merlin. Please refer to the table below for more information about each field.

The profile is automatically assigned a POD reference number (mentioned at the bottom of the form), and is saved as a draft profile in Merlin. This enables users with Profile Manager rights to further edit the profile before submitting it for review and publishing in the POD.

To insert another profile in Merlin, press **Reset** to erase the current data and repeat the above instructions.

**Note:** When inserting a profile, please make sure that you only fill in the fields relevant to that type of profile, and that the information is not contradictory.

The following fields reflect the ones in the Merlin POD form for creating a profile. In a few cases, the name of the field in the sample client differs slightly from the field name in Merlin. Please refer to the online field help in Merlin for detailed field descriptions.

**Note:** Use the **semicolon (;)** - with or without spaces - to separate values in the fields that accept multiple values.

**Example**: For a profile that targets Croatia and France, the **Countries of Dissemination** field would contain the values: "HR; FR" or "HR;FR".

| Field | Comments |
|---|---|
| Profile Type | This field is mandatory and must contain only one value. Choose between: BO, BR, TO, TR, RDR |
| Created By | This field is mandatory. Type the username of the person who drafted the profile. The username is the one used for logging in to the Intranet. |
| Title | Free text, limited to 256 characters including spaces. |
| Internal Reference | Free text, between 2 - 256 characters. |
| Advantages and Innovations | Free text, between 50 - 2000 characters including spaces. |
| Stage of Development | See the "POD Web Service Reference Data" chapter for details on the data format of this field. |
| Comments Regarding Stage of Development | Free text, limited to 2000 characters. |
| Profile Origin | See the "POD Web Service Reference Data" chapter for details. Field not applicable to RDR profiles. |
| Description | Free text, between 100 - 4000 characters. |
| Technical Specification or Expertise Sought | For Technology Profiles in Merlin, this field is called "Minimum Technical Specification or Expertise Needed". Free text, limited to 4000 characters |
| IPR status | See the "POD Web Service Reference Data" chapter for details. Multiple values accepted. |
| Comments Regarding IPR Status | Free text, limited to 2000 characters. |
| Technology Keywords (TEKE) | Type the keyword exactly as it appears in the List of Technology Keywords - **Appendix B** of the Merlin Partner User Guide. A maximum of 5 keywords (lowest level only) is accepted. |
| Market Keywords (MAKE) | Type the keyword exactly as it appears in the List of Technology Keywords - **Appendix A** of the Merlin Partner User Guide. A maximum of 5 keywords (lowest level only) is accepted. |
| NACE Keywords | Type the code exactly as it appears in the List of NACE Codes - **Appendix C** of the Merlin Partner User Guide.A maximum of 5 codes (lowest level only) is accepted. |
| Responsible | Type username (the one used to log in to the Intranet) of the person in charge for this profile. |
| Sector Group | See the "POD Web Service Reference Data" chapter for details. |
| Countries for Dissemination | Multiple values accepted. Data format: ISO 3166-1 alpha-2. |

| Field | Comments |
|---|---|
| Type and Size of Client | See the "POD Web Service Reference Data" chapter for details. |
| Year Established | The value must be an integer number between 1700 and the current year. |
| Already Engaged in Transnational Cooperation | Check the box if "Yes". |
| Additional Comments | Free text, limited to 4000 characters. |
| Certification Standards | See the "POD Web Service Reference Data" chapter for details. Multiple values accepted. |
| Languages Spoken | Multiple values accepted. Data format: ISO 3166-1 alpha-2. |
| Client Country | This field must contain only one value. Data format: ISO 3166-1 alpha-2. |
| Partner Sought | Free text, limited at 4000 characters. |
| Type and Role of Partner Sought | Free text, limited at 4000 characters. |
| Profile is open for EOI | Check the box if "Yes". |
| Type and Size of Partner Sought | See the "POD Web Service Reference Data" chapter for details. Multiple values accepted. |
| Type of Partnership Considered | See the "POD Web Service Reference Data" chapter for details. Multiple values accepted. |
| Framework Programme | RDR profiles only. See the "POD Web Service Reference Data" chapter for details. |
| Call Name | RDR profiles only. Free text, limited to 256 characters. |
| Submission and Evaluation Scheme | RDR profiles only. Free text, limited to 256 characters. |
| Anticipated Project Budget | RDR profiles only. Free text, limited to 32 characters. |
| Coordinator Required | RDR profiles only. Check the box if "Yes". |
| Deadline for Call | RDR profiles only. Click the arrow of the drop down box to select the date. |
| Project Duration | RDR profiles only. The value must be a number; where applicable, use a decimal point (.) to separate the decimals. |
| Weblink to the Call | RDR profiles only. Free text, limited to 256 characters. |
| Project Title and Acronym | RDR profiles only. Free text, limited to 256 characters. |
| Attachment | The following file extensions are allowed: jpg, gif, png, jpeg. The maximum size file is 4MB. |
| | |

# 14. Managing Events

Events provide companies the opportunity to meet face to face and are an important step in creating partnerships.

This chapter explains Events in Merlin. It shows how to:

- Create and publish an event
- Search events
- Manage event registration

**Note:** This chapter is undergoing revision. Some of the information in this document may not be in line with Merlin system. The paragraphs marked with change bars have been updated are provide accurate information. Further updates will be included with the next release of Merlin.

## Before you start

It is useful to bear in mind the following business rules when you organise an event, to ensure that it is eligible and to make the most of your efforts.

### Event eligibility

Events promoted via the Merlin Events Module must meet three prerequisites:

The event is organised/co-organised by the Network partner inserting the information in the event creation form in Merlin, i.e. the Network partner has a major role in the organisation.

The event is an international event – i.e. relevant for Network partners and/or their clients outside the country of the organiser or the country where the event is organised (local, regional or national events solely targeting clients or network partners from a single region or country should not be registered in Network Events Module).

The event is registered sufficiently in advance to give other Network partners and their clients time to integrate it in their planning, register and prepare correctly for it. For Brokerage Events and Company Missions, strict deadlines must be met for them to be eligible. Please refer to the *Guidelines on eligibility of Network activities.*

### Types of events

The types of event that can be inserted in the Events Module are:

- Brokerage event
- Company mission
- Conference / Seminar / Information day
- Fair / Exhibition
- Sector group meeting
- Training

- Working Group meeting
- Workshop

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**Note:** Fairs and Exhibitions will be removed from Merlin in future releases.

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### Special conditions for brokerage events (BE) and company missions (CM)

BE and CM are the two types of events whose registration in the Network event database is compulsory (see *Guidelines on eligibility of Network activities* for details).

Brokerage events and company missions provide companies with the opportunity to meet face to face and are an important step in creating partnerships. Whether through pre-scheduled meetings at a large conference, or a private meeting between a handful of companies, the goal of these two types of events is always to provide an opportunity for people to develop trust in their personal relationship with potential business partners.

Definitions and flow charts for BE and CM can be found in the Annex1 of the Partnership Process Guidelines published in the Network Intranet.

#### Who can organise a BE or a CM?

In the case of BE and CM the event has to be organized by a EEN members having a portfolio of local companies as target audience.

Under certain conditions, it is possible to organise a BE outside of the region covered by your consortium or organisation. Please refer to the Guidelines on eligibility of Network activities for details.

When a company registers by itself as a participant (i.e. not via an EEN Network member), it is compulsory to contact the EEN partner in charge of the region where that company is located (see *Guidelines on eligibility of Network activities*).

#### Participation fees

It is possible to ask participants to a BE or a CM for a fee, but this must comply with normal practices in your organisation and must be included in the information sent for publication in the Events Module.

If there are co-organisers, you have to agree with them on the fee policy for the jointly organised BE or CM.

Nevertheless registration fees can only be charged to companies participating in BE. Services delivered in the frame of a BE can only be charged by the EEN partner that has this company in its portfolio. Partners cannot charge any costs (except registration fees) to other partners' companies (see *Guidelines on eligibility of Network activities*).

## My Events - Dashboard

The My Events Dashboard is the main area where you can view and manage all events that your organisation has created and the various stages of the events development.

From this page it is possible to view:

- **Events - Draft:** All events going through draft stage of creation. These events are not yet published.
- **Events - To be modified:** All events that have been put on hold by the Agency Event Validator.
- **Events - Under Review:** All events that are being reviewed before being published.
- **Events - Published:** All events that have been published.
- **Events - Cancelled:** All events that have been cancelled. Events under this table have not yet been carried out and can be reactivated by the event organiser.
- **Events - Archived:** All finished events are archived after the closing date. Also visible are events rejected by the Agency Event Validator and events that have been deleted.

To access the My Events Dashboard in Merlin, click **Events** tab > **My Events** from Partnering Home. The dashboard looks as shown in the following graphic:

## My Events - Dashboard

**Events - Draft**

| Title | Start Date ▾ | Country | City | End Date | View |
|-------|-----------|---------|------|----------|------|
| No records to display. | | | | | |

Displaying items 0 - 0 of 0

Show All

**Events - To be modified**

| Title | Start Date ▾ | Country | City | End Date | View |
|-------|-----------|---------|------|----------|------|
| No records to display. | | | | | |

Displaying items 0 - 0 of 0

Show All

**Events - Under review**

| Title | Start Date ▾ | Country | City | End Date | View |
|-------|-----------|---------|------|----------|------|
| No records to display. | | | | | |

Displaying items 0 - 0 of 0

Show All

**Events - Published**

| Title | Start Date ▾ | Country | City | End Date | View |
|-------|-----------|---------|------|----------|------|
| No records to display. | | | | | |

Displaying items 0 - 0 of 0

# Creating an event

To create an event in Merlin you will need to open the events form which can be found by navigating to **Events > New** on the Merlin Partnering dashboard. The first tab of the events form will open:



The Events form is divided into several tabs. When you are creating an event, go through each tab carefully and enter all of the necessary information. You can switch from one tab to another at any time of the editing process.

The tabs are:

- Event details
- Agenda & registration
- Event Location
- Hotel List
- New registration (this tab will only appear if registration is allowed for an event)
- Participants (this tab will only appear after the event is validated)

**When to publish an event within the Network?**

You are encouraged to publish planned events as early as possible – even if not all details are known, to give colleagues time to add the event in their activity plan and recruit clients, or to coordinate events they might plan with your event if they target the same sector / country / dates. You will be able to update the event afterwards with further details (with the exception of the start, end and closing dates which cannot be changed once the event is published) up to the closing date.

You can register an event very early by providing a limited amount of key details: date, main objectives, sectors covered, main organiser. You can update the contents with more detailed information as they become available.

It is highly recommended that you do not submit your event for review unless you have entered enough relevant information to allow others to determine whether it might be interesting for them or their clients. If you need to stop before you are finished you can **Save as Draft**. The event is not sent for review until you click **Submit**.

If the event is not ready for promotion to clients but enough information is available for other Network partners to start planning, select "Publish on Enterprise Europe Network Intranet only": it will only be visible in the Intranet. If you have to cancel it, you can do easily it and clients will not have seen it.

When the event is ready to be promoted to clients, update it to "Publish on Intranet and Public Website", making it visible to end-clients via the events' calendar and clients' event queries.

**Event details**

This tab will contain the minimum compulsory information about your event. Mandatory fields are marked with an asterisk (*).

1. Enter the event details. Refer to the following tables for a description of the requirements for each field.

**Description**

| Field | Description | Details |
|-------|-------------|---------|
| Title | Title of the event that will appear in the event calendar on the intranet and/or public site. | This field is mandatory for each event.<br><br>The title should be clear and meaningful for non-experts in the technology or sector of the event. It should enable clients to see if the event interests them, and Network Partners to see which companies or researchers in their region might be appropriate attendees.<br><br>Remember that this is the very first section to be read: it should be clear, concise (it is not an advert, and there is room in the abstract and description for further details), and attractive (avoid "marketing speak": remain as matter-of-fact as possible) with no spelling mistakes or typos.<br><br>If the event is a brokerage event, indicate it in the title.<br><br>Please remember that stand-alone acronyms, product names or trademarks are not allowed and that the maximum character length of the title is 256 including spaces. |
| Publish on | Choose whether the event should be promoted to the public via the event calendar on the internet, or only to Network partners via the Network intranet. | • Enterprise Europe Network intranet only<br>• Intranet and public website |
| Type | Type of event you are organising | Select an event type from the drop-down list. |
| Start date | Day on which the event starts | Select a date from the calendar. |
| End date | Day on which the event is finishes | Select a date from the calendar. |

| Field | Description | Details |
|---|---|---|
| Closing date | Deadline after the event for retrieving feedback from participants | Select a date from the calendar. This date is mandatory as of July 2014. Please see the field-related online help for further instructions regarding the closing date. |
| City | City in which the event will take place | Free text |
| Country | Country in which the event will take place | Select the country from the drop down list. |
| Description | Describe the event. If you are organising registration outside of the Network intranet, include registration information here. | Free text<br><br>This field is mandatory and is one of the most important fields of the event. It is the basis for the validation of the event by the Agency. Please provide all details relating to the event (maximum 4000 characters including spaces). Ensure that all information included in this field does not contradict others statements made elsewhere in the form and also that the information is not duplicated in other sections of the event form. |
| Relevant EU programmes | EU programmes associated with the event | Select the relevant EU programme from the drop down list. To select multiple programmes, hold **Ctrl** while making your selection. |
| Industrial sectors | Industrial sectors involved in the event | Select the industrial sector or type for the event. To select multiple industrial sectors, hold **Ctrl** while making your selection. |

**Event targeting the following sectors**

| Field | Description | Details |
|---|---|---|
| Technology Keywords | Technology keyword associated to the event | Enter the technology keywords relating to the event. The system will automatically display all the keywords containing the characters you type. |
| Market Keywords | Market keyword associated to the event | Enter the market keywords relating to the event. The system will automatically display all the keywords containing the characters you type. |

When adding keywords you can click the ➕ icon to open the keyword picker. From the keyword picker you can add keywords by viewing and selecting keywords from the tree view. For further information please see Working with Technology, Market and NACE Keywords section of this user guide.

---

**Note:** All keywords were reviewed and updated in Q4 2013 to reflect recent advances in technology and business. Some obsolete Market and Technology keywords were removed, while new keywords were added to the list. Therefore, as of December 2013 (Merlin release 1.4) you are no longer able to select the obsolete keywords in creating your events. You can, however, search for events published before Release 1.4 using such keywords. For a full list of existing keywords please see the relevant appendices of this user guide.

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**Organisations involved**

| Field | Description | Details |
|---|---|---|
| Name of Enterprise Europe Network partner | Name of the Network partner organising the event | Auto-populated field containing your organisation. |
| Organisation Hosting the Event | Name of the organisation hosting the event | Free text |

| Field | Description | Details |
|---|---|---|
| Co-organisers | List of other Network partners that act as co-organisers | Type the ID or name of the EEN partner. As soon as you start typing, the list of organisations matching the selected combination of letters will be displayed. Select the desired partner in the list. |
| Other partners involved | List of other Network partners who brought clients to the event and helped their clients prepare (e.g. with registration) for the event. | Type the ID or name of the EEN partner. As soon as you start typing, the list of organisations matching the selected combination of letters will be displayed. Select the desired partner in the list. |
| Non Enterprise Europe Network organiser | Name of an organisation outside of the European Enterprise Network that is involved in the organisation of the event | Select a Non Enterprise Europe Network organiser from the drop down list. |
| Sector groups involved | Sector groups involved in the organisation of the event | Click to select a sector group in the list. To select multiple sector groups, hold the **Ctrl** key while selecting the desired items. |

**Contact details**

| Field | Description | Details |
|---|---|---|
| Contact name | Name of the event organiser | Select the organiser (from your organisation) in the drop down list |
| Contact telephone | Telephone number of the event organiser | Auto-populated with organiser telephone number |
| Contact fax | Fax number of the event organiser | Auto-populated with organiser fax number |
| Contact email | Email address of the event organiser | Auto-populated with organiser email address |
| Website | You can provide additional information about the organiser e.g. a link to its website. | Free text |

**2.** Click **Next** or the **Agenda & registration** tab to continue.

---

**Note:** If you do not want to continue creating the event, you can click **Save as Draft**. This will close the Event form. You can always re-open and edit saved draft events from the Events Dashboard.

---

**Agenda & registration**

This tab allows you to give key registration information for Network partners and clients as well as to define the online registration parameters for the event if you use the Network Event integrated online registration facility. Depending on the event style you select on the Event details tab, your event may be published on the internet, which allows users outside the Network to register.

You should always fill out this tab, even if you are using your own registration tool (e.g. brokerage events registration and matching tool).

**Note:** If you do not check **Activate the facility**, then the registration tab will not appear on the public website or on the Network intranet.

1. Enter the registration details. Refer to the following table for a description of the requirements for each field.

| Field | Description | Details |
|-------|-------------|---------|
| Activate the facility | Select this check box if you want to activate the Network Event integrated online registration facility. | If you do not choose to use this facility, registration to the event will not be possible. |
| Deadline for registering | This is the date on which you want to close registration for the event. | The registration automatically closes on this date. No further registration will be allowed. |
| Preliminary text | Enter a short welcome message or introduction for the event. | This message appears at the top of the New Registration tab |
| Agenda of the meeting | You can attach a file that outlines the agenda of the event. | There is no restriction on the file type and number of files that can be uploaded. |

2. Click **Next** or the **Location** tab to continue.

**Location**

This tab allows you to define the location details for the event.

1.  Enter the location details. Refer to the following table for a description of the requirements for each field.

| Field | Description | Details |
|-------|-------------|---------|
| Name | Name of the location where the event takes place. (e.g. Brussels Business Centre) | The is the name of the venue |
| Event address | Address of the event location | |
| Location (City) | City where the event takes place | This field will be pre-filled with the data from Event Details, but you can insert additional more specific information. |
| Location (Country) | Country where the event takes place | Click the icon to browse for a country, or type the name of the country in the field. |
| Location contact telephone | Telephone number of the venue | Remember to include the national and international dialling codes. |
| Location contact fax | Fax number of the venue | Remember to include the national and international dialling codes. |
| Location map | You can upload a map of the venue location | |
| Web page | Link to the venue's website | |
| Contact name | Name of contact person at the venue | |
| Contact telephone | Telephone number of the contact at the venue | Remember to include the national and international dialling codes. |
| Contact fax | Fax number for the contact at the venue | Remember to include the national and international dialling codes. |
| Contact email | Email address of the contact at the venue | |

2.  Click **Next** or the **Hotel list** tab to continue.

**Hotel list**

This tab allows you to define the list of hotels near the event. You can upload files containing hotel information as well as hotel registration forms.

To upload a file, do the following:

1. Click **Select**.
2. Locate the file on your computer and click **Open**; the path to the file will be shown in the upload field.



3. Add additional files (as required), by repeating the steps above. Alternatively, if you wish to remove uploaded file, click the **Remove** button.
4. Click **Save** to save a draft of your event and return to the dashboard or click **Submit** to submit the event to the Agency Event Validator for review.

Once the event has been reviewed by the Agency Event Validator, you will receive a message stating that it has been validated, or a message outlining changes that need to be made.

When the event is validated it is automatically published. If you selected to allow registration through the online registration facility, the New Registration tab and the Participants tab appear when you view the event.

**Remember**: You can update the event with further details as they become available or make changes to the existing event details also after the event has been published, as long as you have provided the minimum key details for the event to be validated and published. Any event can be edited up to the closing date. This will enable organizers to update the list of participants who attended the event, as well as any other details to ensure that their feedback report is correct. However once your event has reached its end date, the dates can no longer be modified.

## Event Validation Procedure

Once an event is submitted by its organiser, it will go through the Agency validation workflow, which includes a review by dedicated staff in the Agency. At this point the status of the event is **Under Review** in your **My Events - Dashboard.**

When reviewing the events the Agency Event Validator has the following options:

- **Approve** the event. Once approved, the event is published to the network. It will be visible in the events calendar and can be searched through the network (and online dependent on whether you made the event visible to the public). You will find your published events in the **Events - Published** table of My Events Dashboard.

- **Reject** the event. The event is archived by the system and can only be viewed for reference.
- **Revise / Block with Question**. The event is sent back to the organiser for update and the status of the event is changed to **On Hold.** After the organiser resubmits the event for review a second time, the system changes its status back to **Under Review.**

## Searching Events

You can easily search all upcoming network events in Merlin by using the events search functionality.

If either of your searches yield positive results you can view the events in detail and if the events are open for registration you can register yours (or your clients) attendance to it.

**Event Simple Search**

To conduct a quick, simple search for events do the following:

1. From Partnering Home click **Events** > **Search Events.** The Event Search window will open:



Note: The following instructions 2) to 8) are optional. You can add as many or as few search criteria as you like. It is also possible to click **Search** without any criteria to show **all** published events.

2. Enter as many search terms as you require to conduct the search in the **Search** field.
3. In the **Free Text option** field, indicate if you would only like to produce results that contain **all words** you specify in the search field or if you would like to search for **any word** which will show events that contains one or more of the terms you specify.
4. In the **Events date interval** field, you can search for all events between a specified start date and end date (by providing a start date and end date). If you provide **just** a start date or an end date you will receive events only occurring after the start date (or until the end date)
5. In the **Event Type(s)** field, you can indicate the type of event you would like to search for. It is possible to select as many event types as required.
6. In the **Countries** field, you can select the country where the event is taking place.
7. In the **Technology Keywords** and **Market Keywords** fields specify any technology or market keywords related to specialisms covered by the events you are searching for. For a full list of all Market and Technology keywords please

refer to the relevant Appendices section of this guide. Click ⊞ to open the Keyword picker to choose keywords from a tree view format. To learn more about this please see How do I select keywords in Merlin? section of the *Merlin Partner User Guide.*

---

**Note:** If you do not select any keywords, the system will ignore the keywords and will perform the search based on the other criteria you specified.

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8. In the **Industrial Sectors** field, indicate the industrial sector of the event you are looking for.
9. Click **Search.** The system will display the events matching your criteria in a list.

**Last Modified :**

Last week
Last month
Last quarter
Last year

**B2B 4 Energy: Technology Brokerage Event during Expo Energy 2010**

Brokerage Events : Updated last month from **Bulgaria**

Enterprise Europe Network – Bulgaria is organising a technology and business matchmaking event during Expo Energy 2010, from 13 to 16 April 2010 in... ?
**Technology keywords :**
**Market keywords :**
**NACE keywords :**

**BBF / EXPO COMM ITALIA 2009**

Brokerage Events : Updated last month from **Italy**

Unioncamere Lazio, BIC Lazio and Mondimpresa, representing Enterprise Europe Network, in partnership with Sviluppo Lazio and the Italian Institute for... ?
**Technology keywords :**
**Market keywords :**
**NACE keywords :**

**ITN - Infrastructure, Telematics & Navigation**

Brokerage Events : Updated last month from **Italy**

Torino Chamber of Commerce, Lingotto Fiere/Group GL events Italia and Wireless, with the scientific support of Torino Wireless Foundation, are... ?
**Technology keywords :**
**Market keywords :**
**NACE keywords :**

10. Adapt your search to show events that have been recently modified by clicking the '**Last modified**' buttons on the left hand side of the results page.
11. Once you have located an event that is suitable, click the event title to view it in greater detail. The event view will open. From this page you will be able to register to the event if it is open for registration or alternatively click **Back** to return to the search results.

---

**Note:** From this page it is also possible to export your search results, or a single event, after you open it. For further details please see "Exporting Events".

---

## Edit an Event

If you are an event organiser or event manager, it is possible to edit your event before and after it has been published should you wish to alter any details of your event. To edit your event, do the following:

1. From the Merlin Dashboard, navigate to **Events** and click **My Events** to access your My Events Management Dashboard.

2. Navigate to the event that you wish to edit and click the event title (or alternatively 🔍 icon).

3. Edit the event as required.

4. Click **Save** to save the event or **Cancel** to remove your edits and return to the My Events Dashboard.

---

**Note:** If you update an event after it is published (e.g. to add new EEN partners as coordinators), your event will not need to be validated again bit it will be recirculated in the event queries, giving it additional visibility.

---

## Event Registration

When you create an event, you have the option to allow participant registration through the Network Event integrated online registration facility.

To activate the online registration facility, select **Activate the Facility** check box on the **Agenda & Registration** tab when creating the event. This activates the registration facility so that potential event participants can register on the intranet and/or internet. For more information about the option refer to the **Create New Event** section of the User Guide.

---

**Note:** If you do not check the **Activate the Facility** check box during event creation then the Registration information does not display on the website.

---

Once the registration deadline is reached, the online registration facility is no longer available.

There are 2 ways of registering for an event:

- Event Registration from the Merlin Intranet (managed by Partner organisations on behalf of their users.)
- Event Registration from the Internet (done by anonymous users / subscribed clients who run an event search on the internet)

When users register for an event via the Network Event integrated online registration facility, a notification is sent to the event organiser (and co-organiser if present). The participant's details are displayed in the Participants tab of the event on the My Events Dashboard. The event organiser or co-organiser can approve or reject the registration request. In both cases, an email notification is sent to the participant to let them know if their registration has been accepted or rejected. For further information on approving and rejecting participants see the Approve / Reject Participant Registration for Events section of the Merlin Partner User Guide.

### Event Registration from Intranet

To add a new participant to an event in Merlin, do the following:

1. From Partnering Home open **My Events Dashboard** (**Events** > **My Events**)
2. Navigate to the **Events - Published** table and locate the event your wish to add a new participant to.



3. Select **View** icon 🔍 to view the event.
4. Click **Manage Participants** tab. The list of the registered participants for the event will be shown.

**5.** Click **New Participant.** The Add New Participant window will open.



**6.** Select who you would like to register: **Myself** (you) or **Someone else.**

**7.** Complete the form as required. Remember fields with an asterisk (*) indicate mandatory fields that must be populated.

**8.** Click **Save** to save the form and register the new participant or **Cancel** to cancel your edits and return to the list of participants.

---

**Note:** If you choose to register someone else, they will receive an email containing a link asking them to confirm their participation in the event. They **must** click on the link to notify you that they want to attend. If the user does not click the link their status will remain as pending. Once you approve the participant they will receive another email confirming their place on the event. See Approve/Reject Participation for an Event

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### Event Registration from Internet

If you have selected that your Event is also published to all users of the internet and Public Website it can be attended by users/anonymous clients who run a search for Events or have queries that whose search criteria match the event. Opening your event to be accessible to the public is a useful dissemination tool for introducing new clients to the network and your organisation.

To learn how a client would register for an event on the internet see the *Merlin Client User Guide.*

### View Event Participants

To view participants for an event, do the following:

**1.** From Partnering Home navigate to **Events** and click **My Events** to open the My Events Dashboard.

**2.** Navigate to the Events - Published table and locate the event that you wish to view its participants.

**3.** Click on the event title or click 🔍 icon to open the event details.

4. Click **Manage Participants** to view all participants that have registered to the event. You will be able to see their status for the event in the list.



5. Click the **View** icon  to view the participant details.



## Approve / Reject Participant Registration for Events

To approve or reject a participant who has registered for your event do the following:

1. From Partnering Home navigate to **Events** and click **My Events**. Your My Events Dashboard will open.

2. Scroll to the **Events - Published** table and locate the event that you wish to approve or reject participants.

3. Click on the event title or click  icon to access the event details.

**4.** Click **Manage Participants** to open the participant management window. All participants for the event will be listed:



**5.** Click the **Approve/Reject** icon [icon] on a participant to open the participant details window.



**6.** Review the participant information and click **Approve** to approve the participant, **Reject** to reject the participant (you must provide a reason for rejection for the participant) or **Cancel** to cancel your selection and return to the participants list.

If you approve the participant, Merlin will send the participant an email confirming their participation in the event. If you reject the participant, Merlin will send the participant notification of their rejection and the reasons for rejection

**Note:** If you decide to change or cancel the event, the participant will receive an email notifying them of the change of event or its cancellation. If you choose to run the event on a different date the participant will have the option of confirming their attendance to the new event from the email they receive.

**Note:** If you accept a participant but for some reason must change their status then it is possible to reject them at a later date by clicking the **Approve/Reject** icon [icon] for the participant and clicking **Reject**.

## View Event Participant Statistics

it is possible to view the event participant statistics for any event that you are managing. This is an effective tool for quickly checking the number of approved, pending and rejected participants for your event without scrolling through a list of each of the users. This is particularly useful for events that have a large number of intended participants.

To view the participant statistics for an event, do the following:

1.  From Partnering Home select **Events** and click **My Events** to open your My Events - Dashboard.
2.  Scroll to the **Events - Published** table and click the event you wish to view the participants' statistics.
3.  Click on the title of the event or click 🔍 to open the event details.
4.  Click **Manage Participants**. The Participants dashboard will open to display a list of all people who have applied to attend the event.
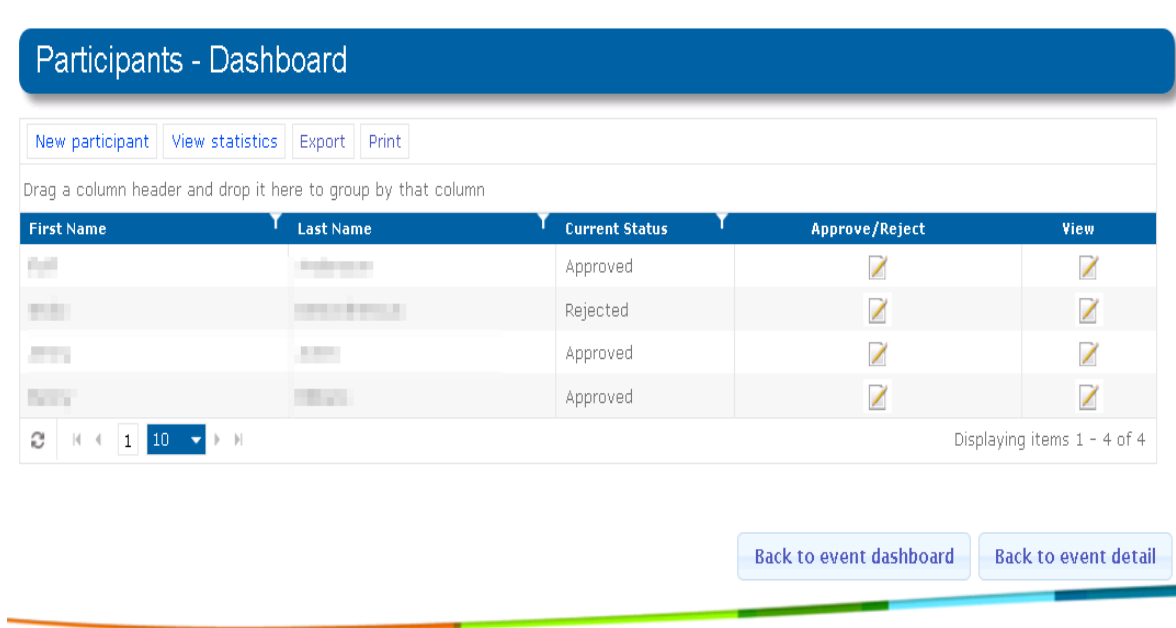


5.  Click **View Statistics**. The participants statistics window will open to display the statistics for users who are approved, pending and rejected for the event.
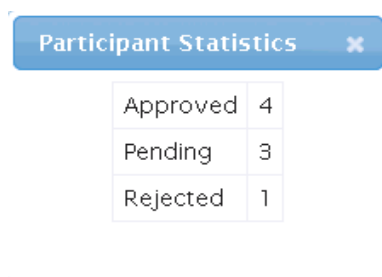


## Export Event Participants List

If you would like to create a print out of all **approved** participants for your event you can export a list in PDF, docx, xlsx, and xml format. This is particularly useful if you would like to get people to sign their attendance as they arrive at the event so you can track actual attendance on the day.

To export the event participant list, do the following:

1.  From Partnering Home select **Events** and click **My Events** to open your My Events - Dashboard.
2.  Scroll to the **Events - Published** table and click on the event you wish to export information.

**3.** Click on the title of the event or click 🔍 to open the event details.

**4.** Click **Manage Participants**. The Participants dashboard will open to display a list of all people who have applied to attend the event and their status.
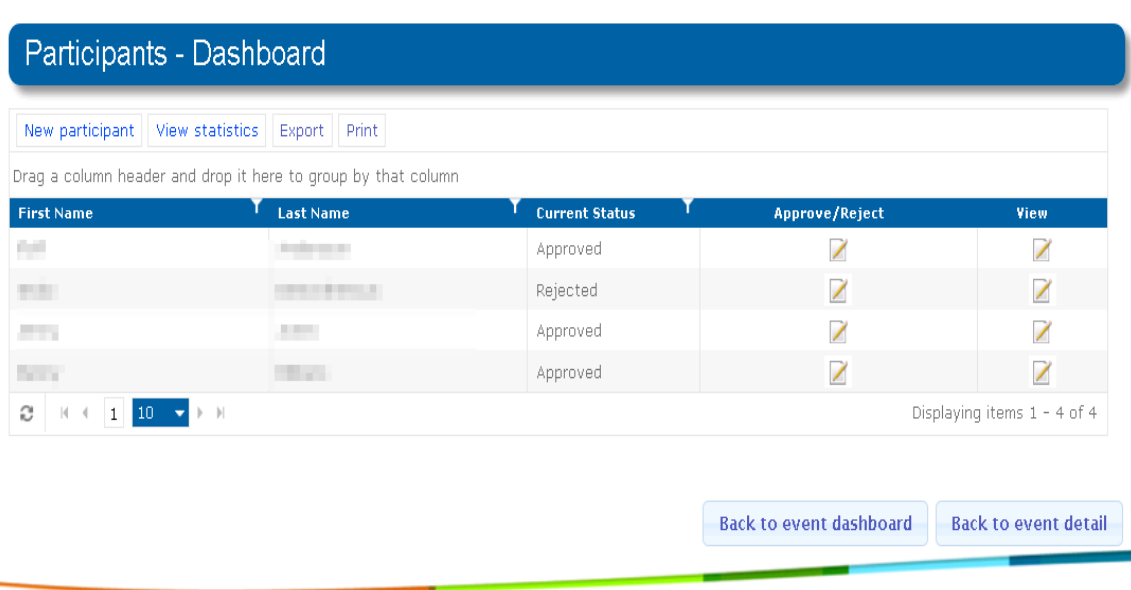


**5.** Click **Export.** The Export window will open for exporting the results in xlsx format.
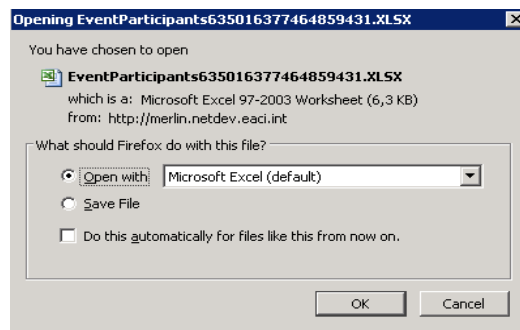


**6.** Select **Open with** and choose the program you would like to immediately open the file or **Save File** to save the file to your computer.

**7.** Click **OK.** The file will download and automatically open in the format that you requested. If you selected **Save file (**in step 6.) then the file will be saved in the Downloads folder of your computer.
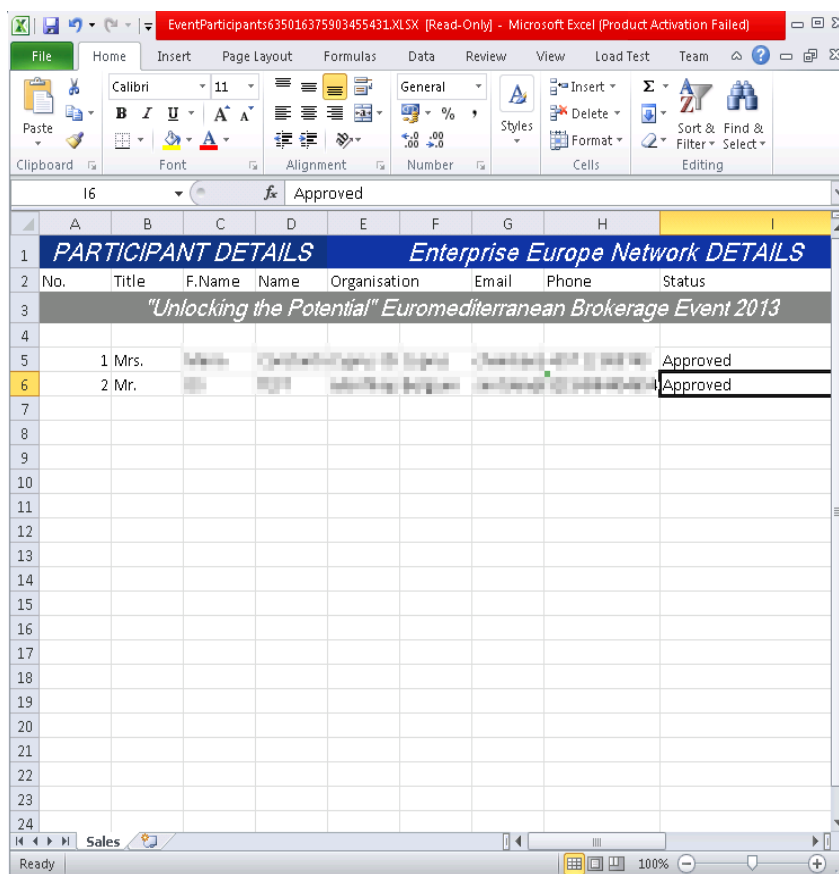


## Print Event Participant List

Printing a list of event participants can help you see the exact number of people registered to attend to an event and on the day of the event getting the participants to sign the sheet to confirm their presence.

To print a list of event participants that have been **approved** for your event do the following:

**1.** From Partnering Home select **Events** and click **My Events** to open your My Events - Dashboard.

**2.** Scroll to the **Events - Published** table and click on the event you wish to print information.

**3.** Click on the title of the event or click 🔍 to open the event details.

**4.** Click **Manage Participants**. The Participants dashboard will open to display a list of all people who have applied to attend the event and their status.
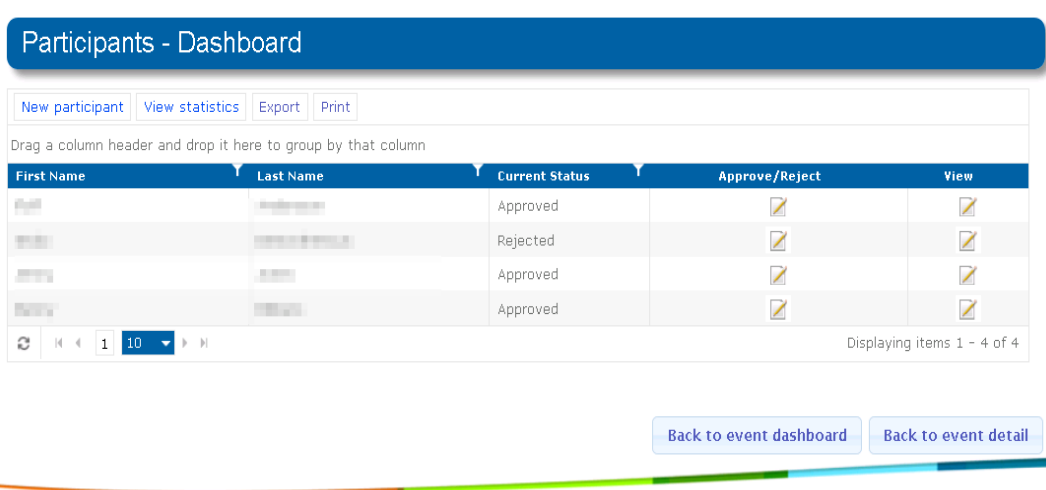


**5.** Click **Print.** The print window will open:
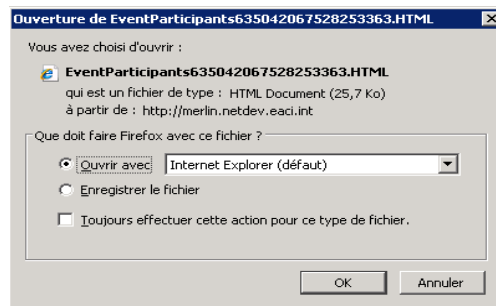


**6.** Select **Open with** and choose the program you would like to immediately open the file or **Save File** to save the file to your computer.

**7.** Click **OK.** The file will download and automatically open in the format that you requested. If you selected **Save file (**in step 6.) then the file will be saved in the Downloads folder of your computer:
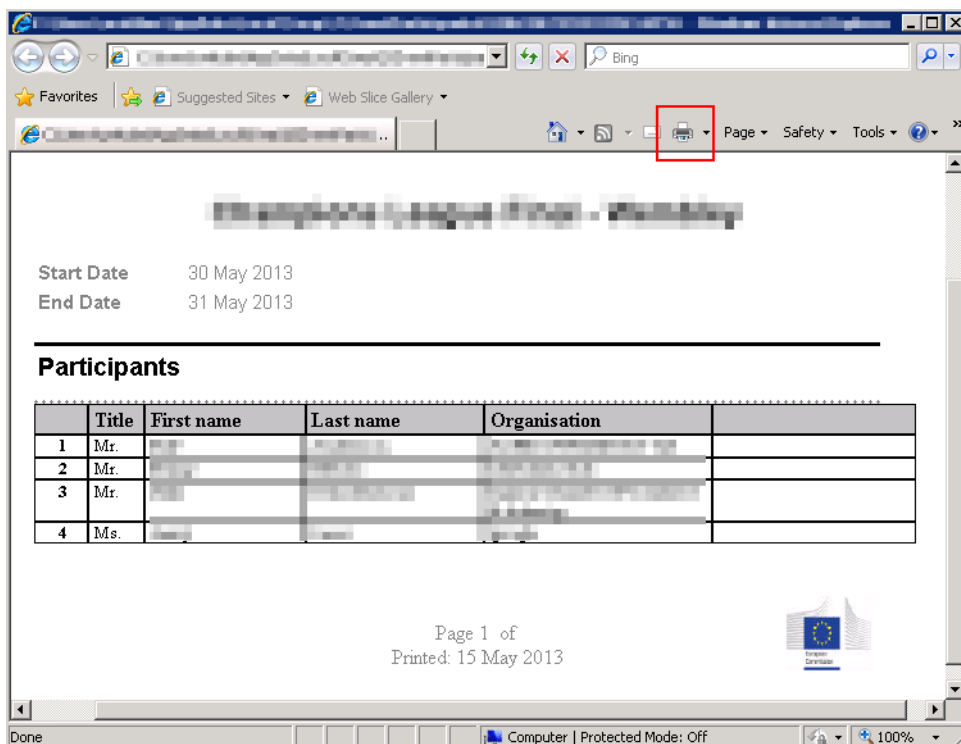
8. With the html file open you can then print the list like you would print any other document from the internet (Press **Ctrl+P** or click the printer icon on your browser).

## Cancel an Event

Occasionally there may be the need to cancel an event that has already been validated. There are many reasons why this may happen but most often it is due to a insufficient interest/registrations for the event. If this situation occurs then the event organiser or Event Validator can cancel a validated event.

To do so, do the following:

1. From Partnering Home select **Events** and click **My Events** to open the My Events Dashboard.
2. Scroll to the **Events - Published** table and click the event you wish to cancel.
3. Click on the title of the event or click 🔍 to open the event details.
4. Scroll to the bottom of the event and click **Delete.** The event will be cancelled. All participants that have registered for the event will be notified of the cancellation by email and the event will be moved to the **Events - Cancelled** table of the My Events Dashboard.

---

**Note:** Cancelled events can be reopened for participation should the status of the event be changed to open. Cancelled events would need to go through Event Validation again.Once the event has been published the previous registrants to the original event will be notified that the event has been reopened and given the opportunity to re-register their attendance.

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## The Events Calendar

All upcoming validated events are automatically shown in the Events Calendar. From here it is possible to view and register for events that may be of interest to you and your clients. It is also possible to export events to various formats (see "Exporting Events").

To access the events calendar, click **Events > Events Calendar** from Partnering Home. The events calendar will open showing the planned events for the current month:

---

**Note:** It is also possible for any user to access the events calendar from the EEN main page (http://een.ec.europa.eu/) by selecting **Events> Events Calendar**. However, non-EEN users will not see all types of events, nor the Feedback column.

---

To navigate to a particular date in the events calendar, click the drop-downs next to **Month** and **Year** and select the desired month/year. The events calendar will open all validated events for the chosen month/year.

If you would like to see a list of all past events then you can click **Show All Past Events** at anytime. Additionally, you can see **all** next events by clicking **Show All Future Events.**

**View Events in the Events Calendar**

To view an event in the events calendar click on an event title to open the event information page. This page contains all information regarding the event and any additional information that may be useful to participants.



If the event is open for registration you will be able to register yourself or someone else to the event by clicking **Register for this event** and completing the form.

The participant will be notified by email that you have registered them for and event. They will need to click on the link to accept their participation in the event. The event creator and co-organiser (if applicable) will then approve the participant. To learn more about event registration see Event Registration from Intranet.

## Reassign All Upcoming Events

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**Note:** The following instructions can only be completed by an Event Manager in Merlin. Standard users of Merlin can not reassign all approved events.

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There may be instances where an Event Manager will need to reassign **all** events to another Partner or organisation (i.e. in instances of EEN Partner networks being merged).

To reassign all events, do the following:

**1.** From Partnering Home click **Events** > **Reassign all events.** The Reassign all events window will open.



**2.** Select the country where the network that you want to reassign you events to is located.

**3.** Select the EEN partner who will be in charge of the events.

**4.** Select the contact person to whom you will assign your events.

**5.** Click **Save.** The person you chose will now be able to see all the events in their Events Management dashboard.

### Reassign a Single Event

If you wish to reassign a single event to another member of an organisation, do the following:

**1.** From Partnering Home click **Events > My Events.** The Events dashboard will open.

**2.** Click an event from the **Events - Published** column. The Event details will open.

**3.** Click **Reassign this Event.** The Reassign your Event window page will open.

**4.** Select the country of the person you wish to reassign the event to.

**5.** Select the **EEN Partner in Charge** who will be in charge of the Event. This will be an organisation within the country that you selected in step 4.

**6.** Select the **Contact Person** who will be in charge of the event.

**7.** Click **Save**. The event will be sent to the person you have chosen. It will no longer be visible on your My Events Dashboard.

## Co-organised Events Dashboard

The Co-organised Events dashboard shows all the events for which you are a co-organiser or in which you have been mentioned as a partner (in the field *Other Partners Involved*) by the main organiser.

For draft events you can only see the title. For published events you can access the event details by clicking on the event name in the dashboard as well as enter your feedback for the event (see "Managing Event Feedback").

In addition, co-organisers are able to manage participants to the event alongside the main organiser. The process of managing participants is the same as if you created the event yourself. To learn more about managing participants please see Event Registration from Intranet.

## Registered Events Dashboard

The Registered Events dashboard shows all events that you have registered to attend. From this dashboard it is also possible to register other people to the same event by clicking the event title you wish to register someone for, clicking **Register for this Event** and submitting the participants details. This is the same process as if you have searched for an Event in Merlin and chosen to register your attendance.



## Exporting Events

It is possible to export events in Merlin to the following formats: PDF, docx (word document files), xlsx (Excel documents), and xml (extensible markup language) to enable you to distribute hard copies of events as handouts to attendees of conferences, training and marketing events that you may be involved in.

There are two types of event export possible:

- Export a single event (from the Event Details page of an event. You will export the event in one file.)
- Export multiple events (from the search results page or the Events Calendar. You will export your results in one Excel file.)

### Export an Event

The following process is the same as exporting Profiles. To learn how to export Profiles please see Export Profiles section of the *Merlin Partner User Guide.*

To export a single event, do the following:

1.  Search for your events using the filters and criteria that you select (to learn how to search events please see the Searching Events section of the *Merlin Partner User Guide*). Alternatively, open the Events Calendar to view the events occurring during a specific period.
2.  Once you have identified an event that you wish to export, click on it to open the Event Details page.

**3.** Click **Export.** The Export Result window will open:
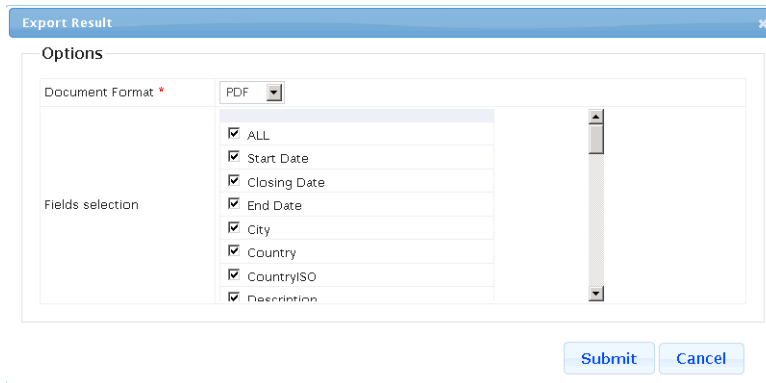


**4.** Select the desired document format to complete the export.

**5.** Mark the fields that you wish to export or mark **All** to extract all fields for each event.

**Note:** If you only select a few fields these are all that will be shown for each event after export.

**6.** Click **Submit** to start the export, and follow the on-screen instructions to open the generated file directly or to save it to your computer.

## Export Multiple Events

You can export multiple events that you have found through the event search functionality, as well as events found in the Events Calendar. The two methods differ in the way the information is presented in the output file.

### Export multiple events from search results

**1.** Search for your events using the filters and criteria that you select. To learn how to search events please see the Searching Events section of the *Merlin Partner User Guide.*

**Note:** You must limit your export of events results to less than 200 events. This is because the exported file size will be very large. If your event search shows more than 200 results it is recommended that you refine your search and try again.

**2.** Once your search has brought up enough events you are happy with, click **Export.** The Export Result window opens:
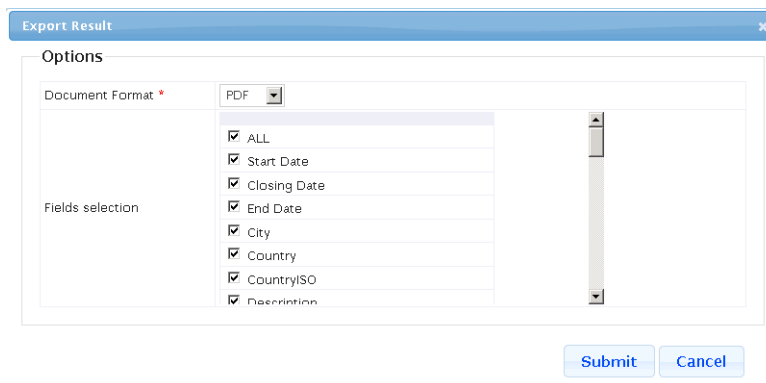


**3.** Select the desired document format to complete the export.

**4.** Mark the fields that you wish to export or select **All** to extract all fields for each event.

**Note:** If you only select a few fields these are all that will be shown for each profile after export.

**5.** Click **Submit** to start the export, and follow the on-screen instructions to open the generated file directly or to save it to your computer.
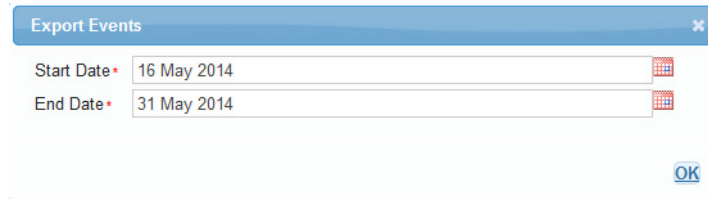
**Note:** The export results will download as one file (not single files for each event).

Managing Events**133**
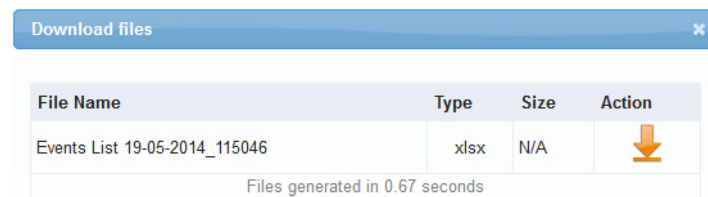
**Export multiple events from the Events Calendar**

The Events Calendar allows you to export a list of events that take place during a selected period of time:

1.  In the top right corner of the Events Calendar page click the **Export** button.
2.  In the calendar dialog, pick the start and end dates, then click **OK** to generate an Excel (xlsx) file containing all events occurring during the selected period.



3.  To access the file, click the download arrow ⬇ in the "Download files" dialog, then follow the on-screen instructions to open the generated file directly or to save it to your computer.



# Managing Event Feedback

Currently it is possible for Network Partners to submit feedback reports for company missions and brokerage events. In future releases, it will be possible to allow event participants to submit feedback using Merlin forms. This feature will be available for events other than BE and CM.

Feedback can be submitted on **published events**, only after the event has ended (i.e. after the end date) and before the closing date.

**Feedback form for BE and CM**

The feedback form is created by the main organiser, filled in by all the partners involved in the event (organisers and participating partners), and finally submitted to the Agency by the main organiser.

The form is accessible via the My Events Dashboard for main organiser and the My Co-organised Events Dashboard respectively, for all the other partners involved.

The form consists of two parts:

1.  The first part provides an overview of the event and must be filled in by the main organizer based on feedback collected from clients who attended the event.
2.  The second part (Event outputs) regards the number of clients supported by each participant in the event (i.e. main organizer, co-organizers and other partners involved) and the numbers of meeting they attended. This part can also be filled in by the main partner, provided they receive the data from the other participants.

---

**Warning! The data you provide in this form is taken into account for official reporting purposes.**

**Main partners** - only generate this form once you have the final list of participants. Any changes you make in the *Co-organisers* or *Other partners involved* fields of the event after the feedback form is created will not be taken into account in the **Event outputs** section of the report. Therefore newly added partners will not be able to fill in their data.

---

**Note:** It is advisable that you submit a feedback form only when you are sure that all the information is correct and complete. If you have submitted your report with erroneous information, you can still correct it provided **you have not exceeded the closing date** of the event. After the closing date, you cannot make any changes to the numbers in the form. If you or your Project Advisor detect any errors in your report, you should provide your Project Advisor the correct information and a justification for the modification so that an Agency Project Advisor can correct it. **Exception**: Project Advisors cannot add or delete partners in the **Event outputs** (see Warning above), but they can correct existing data in those fields.

It is advisable that you **save a draft** of your feedback form as soon as you start filling it in. This will enable you to edit the form as many times as necessary before submitting it. You must fill in at least one field of the form to be able to save a draft.

**Submitting feedback for BE and CM:**

**First section** - to be filled in **by the main organiser**. This section is visible in read-only mode to all partners involved in the event.

1. Create the feedback form:
   - Go to **My Events dashboard**, and click on the event for which you wish to enter feedback.
   - The **Event Details page** will open. Click on the **Enter Feedback** button to create the feedback form. The form will open.

**Note:** Once the form is created, if you leave the page, press **Manage Feedback >Enter Feedback** in the event details page to return to your form.

2. Fill in the form:

- **For countries, type the names** of all countries represented by clients at your event – **including your own.** The number of countries represented will be calculated automatically.
- **All other fields should contain numbers, not percentages**.
- If you leave a field empty, it is automatically filled with the value "0" (zero) when you save or submit your form.
- For **Company Missions**, the number of meetings **is not** the number of visits, but the number of potential collaborations to follow up.
  - E.g. If you bring a group of 3 clients to visit 2 foreign companies, each of your clients will meet with each of the foreign companies. Therefore, the total number of meetings (i.e. potential collaborations) is 3x2 = 6.
- When filling in the **Transnational meetings - number of client ratings** section, count every client's answer.
  - E.g. If both clients who took part in the same meeting rated it as "Cooperation possible", the field should contain the number "2".
- If you mentioned the involvement of any **Sector Group** in your event, you must also collect feedback from the participating SG members and describe their contribution and lessons learned in the Sector Group field.
- Optionally, fill in the Event outputs section on behalf of the other partners, provided you have received the correct data from the partners.

3. Click **Save as Draft** if you wish to return to the form later, **or Submit** to send your feedback to the Agency, **only if** all the other partners have filled in the data pertaining to their own contribution in the event.

- At this point, the Enter Feedback button changes to Manage Feedback.
- If you have saved a draft of your form, to **update the form** click Manage Feedback >Enter Feedback in the event details page.

**Second part (Event outputs)** to be filled in by all partners (including the main organiser) or by the main organiser with data provided by the other partners.

1. Access the form:

- Go to **My Events dashboard** (main organiser) or **Co-organised Events dashboard** respectively (Co-organisers and other partners involved) and click on the event for which you wish to enter feedback. In the **Event Details page** click on **Manage Feedback > Enter Feedback** to open the form

  If you are not the main organiser, you are able to view the data filled in by all the other partners involved in the event, but you are only able to enter and modify data pertaining to your own organization:

2.  Indicate the number of clients that attended the event with your support and the number of meetings they attended, then save your form to submit the data to the main organiser.

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**Note:** Only the main organiser can submit the feedback report form to the Agency.

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## Viewing the Feedback Report

The feedback report is accessible to all partners once the main organiser has saved or submitted the feedback form. To view it, go to your event's details page and click **Feedback Report**. The report displays the information entered in the form, as well as generates a pie chart based on the information inserted under the "Transnational meetings - number of client ratings" section.

In a future release, the pie chart and the "Event Outputs-Total" section will be visible for the entire Network, while access to the other sections will be restricted to the concerned partners.

### Feedback Report

**My Brokerage Event ( 03 Jan 2015 to 03 Jan 2015 )**

**Clients registered for meetings**

    4- countries represented (names) : France, Malta, Romania, Sweden

    35 - number of participating clients

**Number of meetings**

    100 - meetings (total)

    82 - transnational meetings

**Transnational meetings - feedback results**

    35 - number of clients who sent feedback

**Transnational meetings - number of client ratings:**

    6 - insufficient interest/no further contact planned

    14 - very informative but no cooperation planned

    44 - cooperation possible

    36 - cooperation already agreed



Pie chart: 6.00 % (6), 14.00 % (14), 44.00 % (44), 36.00 % (36)
- Insufficient interest/No further contact planned:6
- Very informative but no cooperation planned:14
- Cooperation possible:44
- Cooperation already agreed:36

**Event outputs**

    5 - number of clients - (RO00▒▒▒▒)

    17 - number of meetings - (RO00▒▒▒▒)

    9 - number of clients - (FR00▒▒▒▒)

    27 - number of meetings - (FR00▒▒▒▒)

    3 - number of clients - (MT00▒▒▒▒)

    13 - number of meetings - (MT00▒▒▒▒)

    7 - number of clients - (SE00▒▒▒▒)

    21 - number of meetings - (SE00▒▒▒▒)

**Event outputs - Total**

    24 - Number of clients

    78 - Number of meetings

[ Back to Event ]

# 15. Managing Achievements

This chapter includes general and eligibility information about Partnership Agreements (PA) and Advisory Service Outcomes (ASO), altogether known as achievements. It also contains guidelines on registering, viewing and deleting and exporting achievements. For more detailed instructions about the workflows please see the online field-specific help.

**Note:** This module is currently under development. In a later release you will be able to search for achievements provided you have the proper permissions.

## About Partnership Agreements

**A Partnership Agreement is an acknowledgement** by one (or two) EEN client(s) that they entered into a concrete, medium to long-term international cooperation with another SME, company, research institution, researcher or private person (hereafter 'Party ' to the PA) with EEN assistance.

The two parties involved in the PA must have gotten **in contact via an EEN brokerage activity** and at least one party must have received **direct assistance** from an EEN partner.

An EEN brokerage activity consists in helping a client find potential partners abroad via the publication of a profile in the Partnering Opportunities Database (POD), via a participation to a brokerage event (BE) or company mission (CM), via contacts with other Network partners, or via another channel, and providing the client with the necessary assistance to enter into a concrete, medium to long-term cooperation with the potential partner thus found.

**A PA is the ultimate goal of a brokerage activity.**

The **parties to a PA** (called Clients in the Merlin PA module) can be:

- Private companies, SMEs, entrepreneurs, individuals.
- Research organisations, universities, technology centres.

**Types of PAs**

- Business PA - a PA falling under at least one of the commercial agreement categories listed under "Types of Partnership Agreements"
- Technology PA - a cooperation agreement falling under the technology / know-how / innovation categories listed under "Types of Partnership Agreements".
- Research PA - a cooperation agreement whereby an EEN partner:
    - helped an R&D European project coordinator to find abroad a company/research organisation willing to integrate in their consortium; **OR**
    - helped a client to find and join a European R&D project whose coordinator is in another eligible country.
  **AND**
    - the European R&D project was submitted on time to a call for proposal.

**Approved names for supporting documents presented to clients**

A "List of approved PA names" is available on the intranet and updated as necessary. These are the only names that may be given to the documents presented to and signed by clients in relation to a Partnership Agreement. The list is available here: http://een.ec.europa.eu/my/intranet/partnership-tools-documentation.

Should your business circumstances require you to use a different name for a PA, you may propose additional names in the Merlin **Partnership Agreements forum**. If accepted, they will be added to the "List of approved PA names".

**Eligibility of Partnership Agreements**

For the latest detailed information about the eligibility criteria for partnership agreements please consult the *Eligibility Guidelines*, available here: http://een.ec.europa.eu/my/intranet/reporting-1.

## Types of Partnership Agreements

Although a specific definition of a PA can be difficult to provide, a PA must be both tangible and transparent regarding

- the object of the business collaboration (for a Business PA), or
- the technology transferred (for a Technology PA),
- the European project submitted (for a Research PA).

The benefit of the partnership for the parties involved must be clear in the PA report.

The choice of PA type – to be specified in the PA Statement Letter - should be made by Enterprise Europe Network staff according to the principal object of the PA, in agreement with the definitions given below, when a specific definition is given.

### Types of Business PAs

- Trade intermediary services (distributor, supplier, etc.)
- Franchise
- Joint Venture
- Merger or exchange of shares
- Sale / acquisition of a complete company or a part of it
- Reciprocal production
- Subcontracting / Outsourcing activities
- Transport / Logistics

### Types of Technology PAs

In most cases, a Technology PA involves the transfer of know-how, technology, or expertise from a Developer to the Recipient. For example, the element transferred may describe the technology behind a process that will enable the recipient to either manufacture the product or implement a new process, or system. The following are descriptions of what are regarded as eligible Technology PAs for the Enterprise Europe Network.

#### Licensing Agreement

The transfer of **certain rights** from the Developer of a technology, process or know how to the Recipient, i**n return for a fee or share of royalties**. An Industrial Franchise can be regarded as a type of licensing agreement. This type of agreement allows the Franchise holder (Recipient) to obtain the Franchisee's (Developer) know-how, or expertise in order to manufacture a product that will be distributed under the franchisee's brand in a given territory.

#### Technical Cooperation

Technical cooperation requires that both Parties play an active/creative role by providing their expertise or know-how in order to:

- Adapt a technology, a product or a process for a new application or sector.
- Develop a technology, a product or a process to meet new market needs.

The following types of technical cooperation agreements are regarded as eligible:

- Co-development of a new product using the expertise of the Developer and the production facilities of the Recipient.
- Between two Parties to develop a new version of an existing product to meet market needs.
- Feasibility study including tests customised for a specific application.
- Consortium agreements, joint ventures and technological agreements between customer and suppliers can also be classified as technical cooperation.

### Joint Venture

A joint venture is a strategic alliance between two or more Parties to undertake an economic activity together. The Parties agree to create a new entity together, by both contributing equally, and then share the revenues, expenses, and control of the enterprise. The venture can be for one specific project only, or a continuing business relationship. It implies the creation of a formalised link between companies, with the sharing of commercially sensitive information to allow the development of new technologies, processes or products.

Spin-offs and start-up creations via partnerships between entrepreneurs from universities, research organisations or inventors with investors (e.g. Venture capital funds, business angels, strategic partners etc.) are also eligible joint ventures.

### Commercial Agreement with Technical Assistance

The provision of a number of services in support of, or essential to a transfer of technology:

- Assistance with starting up an installation.
- Advice on the use of a new process.
- Quality control.
- Technical Consultancy.
- Maintenance and machine repair.

Technical assistance ensures the effective start-up and/or maintenance of the transferred technology, but also covers the installation of technology (assembly, engineering work, testing, and training).

### Manufacturing Agreement (Subcontracting & Co-contracting)

These types of agreements are only eligible if they involve some element of the transfer of expertise, know-how, technology and/or training. There are two clear examples where these types of agreements are eligible:

- **Subcontracting Capacity**: the Developer transfers some of its know-how to the subcontractor to allow the sub-contractor to perform the work required.
- **Subcontracting Specialties**: the Contractor selects the subcontractor on the basis of skills, expertise and know-how it possesses, to develop new processes and technologies.
- **Transfer of knowledge in new raw materials**: the developer has a technology to eliminate some specific type of pollutants from contaminated soils and the partner looked for should improve the technology to make it possible to eliminate additional types of pollutants.
- **New way to use an existing production line**: the developer has found a way to modify cardboard-cutting machines to be able to use it to cut glass. He offers other companies to use his technology to do the same with their cardboard-cutting machines.

- **Change in the currently used technology of the partner sought** (installations, process, facilities): the developer created a technology to clean heat exchangers without chemicals. To use the technology, the potential partner will need to make changes in his heat exchanger system.

- **Absolutely novel process**: the developer found a better way and made a machine to sterilise corks, using microwave. It offers the technology to cork companies who will have to integrate a new microwave machine in their production line to replace the chemical treatment unit they used previously.

### Agreements which should not be reported as Technology PAs

#### Agency/Distribution Agreements

Agency and distribution agreements refer to agreements reached with an agent or distributor to find markets for a product. This is a purely commercial form of activity. The agent or distributor will only receive information on the product, advantages, performance, costs etc. to help sell it, but this does not constitute a technology transfer. The agent is simply signing an agreement that allows him to sell the technology on to another company for commercial gain. This type of PA has to be reported as Business PA.

#### EUREKA & CRAFT

Successful searches for partners to participate in EU-funded project proposals must not be reported as Technology PAs but rather as Research PAs.

#### Types of Research PAs

A Research PA involves partners of a project funded under any European programme (including bilateral projects funded under the EUREKA programme) which clearly mention **research and technological development (RTD)** as part of its objectives, as long as part of the project's activities involves RTD and if the RTD component of the project is indicated in the PA report.

## About Advisory Service Outcomes (ASO)

**An Advisory Service Outcome (ASO) is a result of a service** rendered by a Network partner to a client that gives a significant and clearly demonstrable impetus to the client's competitiveness at European level, thus leading to an improvement of its economic situation.

Here are a few examples of eligible ASO:

- successful implementation of an EU regulation e.g. inter-community VAT, compliance with standards, REACH implementation,
- successful IPR filing (patent applied, trade mark registered, …),
- improved business models leading to internationalisation,
- acquired innovation capacity,
- successful access to EU funding

For **more examples** of outcomes giving significant impetus and **further explanations** on ASOs, please visit the intranet page http://een.ec.europa.eu/my/intranet/reporting-1.

## How is an ASO different from a PA?

PAs and ASOs are the results of different services provided in the EEN context: a PA is the result of a brokerage service, while an ASO is the result of an advisory service.

**PAs and ASOs are equally important in impact and reporting terms.**

- **Register a PA if** you have found a partner abroad for your client.

- **Report an ASO if** you provided an advisory service to a client which allowed them to conclude an agreement with a foreign partner they already knew.

If you provided a successful advisory service which is not linked to a particular international cooperation of your client, register an ASO as well.

## Eligibility of Advisory Service Outcomes

For the latest detailed information about the eligibility criteria for advisory service outcomes, please consult the *Eligibility Guidelines*, available here: http://een.ec.europa.eu/my/intranet/reporting-1.

## My Achievements Dashboard

**Note:** You need PA Manager permissions within your organisation to be able to work with Achievements in Merlin. To obtain these permissions, contact your Partner Administrator.

My Achievements Dashboard is the main area where you can view and manage all the achievements that your organisation has created and the various stages of the achievement development.

On this page it is possible to view:

- **Draft**: all PAs and ASOs going through the draft stage of creation. These achievements are not yet registered and can be deleted by the owner at any time. Click the icon 🔍 to only view the content of the achievement, or click the ACH title if you wish to edit its content.
- **Registered**: all PAs and ASOs that have been completed and registered in Merlin. Once an achievement has been registered, it cannot be edited or deleted.
- **On Hold**: registered PAs and ASOs that have been reviewed by Agency Project Advisors and which require modifications. Click the icon 🔍 to only view the content of the achievement, or click the ACH title if you wish to edit its content. **Note** that in the case of PAs, only the Main Partner can re-submit the updated PA to the Agency.
- **Other partners involved**: PAs and ASOs in which you have been mentioned as a contributing partner without being the main or secondary partner (see "Registering an achievement"). You can see the contents of these achievements, except for their reports, but you cannot edit the content of these achievements.
- **Consortium**: all PAs and ASOs created by all the organisations in the consortium to which you belong, including your own organisation. Note that you will not be able to see the contents of any PAs or ASOs in this table (even if created by your own organisation).
- **Rejected**: all PAs and ASOs that have been rejected during an ex-post check (see "Achievement Review") done by Agency staff. These achievements cannot be updated or deleted.

In this dashboard, it is possible to filter all achievements by title, type, involved partners and date. In addition, the achievements status is displayed for Consortium achievements and achievements where you have been mentioned as "Other partner involved".

To access your Achievements Dashboard in Merlin, click **Profiles** >**Achievements** > **My Achievements** from anywhere in the Partnering Dashboard. My Achievements Dashboard looks as captured in the following graphic:

## Registering an achievement

You should register your achievements on a regular basis in Merlin. **Only PAs and ASOs signed and registered during a reporting period will be counted as deliverables for that reporting period.** In addition, registering achievements in time provides wider visibility of the Network's achievements and helps to promote the Network to potential interested parties.

### Partners' roles

Depending on **your role** in the conclusion of the partnership agreement or the service provision, and the specificities of the PA or the ASO, the information you are able/required to enter in the Achievement form may differ:

**Main Partner**

ASOs - you are the partner in charge of drafting and registering the ASO. If any other partner assisted you in providing the advisory service to your client, you will mention them and describe their contribution in the Other Partners Involved tab of your form. However, such partners do not participate in drafting the ASO.

PAs - you initiate the drafting of the PA concluded between your client and another entity abroad (the *other client*). You must specify the data pertaining to your client, to the client abroad (including the *Secondary partner* if any), any other partners that may have assisted you in concluding the PA, the PA source as well as give a comprehensive report about your activities leading up to the conclusion of the PA. Finally, you are the only one who can register the PA once it has been reviewed and approved by the secondary partner as well.

**Note:** If the other client is supported by an EEN Partner, then you cannot add any information about the client, rather this is the responsibility of the Secondary partner.

**Secondary Partner (PA only)** - you are able to see any information about the main partner and their client but you cannot change it. You can edit the title and date of the PA, the information pertaining to your client and the PA source. You must also contribute to drafting the PA report. You are not able to register the PA yourself. However the main partner can only register the PA after you confirm having entered and reviewed all necessary information in it.

**Other partners involved** - you have been mentioned in a PA concluded between clients of other Network partners or in an ASO because you provided assistance in the conclusion of that PA (e.g. by organizing a Brokerage Event enabling the clients to meet) or the provision of the advisory service. You can view all the information pertaining to the achievement - except for the report - but you cannot change that information.

**Note:** Any partners other than the main partner can withdraw their participation from an achievement initiated by the latter. For more information see <u>Resigning from an achievement</u>.

**Register a PA**

On the Partnership dashboard, navigate to **Profiles > Achievements > New.** Click on **+** next to New and choose the type of PA you want to register (*Business PA, Technology PA, Research PA*). The first tab of the PA form will open:



The PA form consists of several tabs:

- Details
- Clients
- Other Partners Involved
- PA Source
- Report
- Call - only for research PAs
- Comments - this tab only appears if the PA was put on hold by an Agency PA Manager, and it displays the reviewer's comments.

When you are creating a PA, **both partners** must go through each tab carefully and enter all of the necessary information. You can switch from one tab to another, and you can **save your draft PA** at any time of the editing process. An internal reference is assigned automatically to the PA, as soon as you first save it.

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**Note:** For detailed information on how to fill in each field, refer the online tooltips for each field marked with  ⑦  .

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**Details**

In this tab you should specify the title and date of conclusion of the PA, as well as the relevant Technology and Market keywords. Mandatory fields are marked with an asterisk (*).

When adding keywords you can click the ☐ icon to open the keyword picker. From the keyword picker you can add keywords by viewing and selecting keywords from the tree view. For further information please see the "Working with Technology, Market and NACE Keywords" section of this user guide.

Click **Next** or the **Clients** tab to continue.

**Clients**

In this tab you should identify of the parties concluding the PA, i.e. the Clients and the Network Partners supporting them, where applicable.

1.  As a main partner, select whether your client is already registered (they have an account in Merlin, regardless of whether or not they receive query results) or not, then provide the client information as required.

2.  Select the type of advisory services you have provided to your client (if any). You can check multiple services at the same time.

3.  Specify whether the **other client** is already a client of another EEN Partner or not:

   *  If **Yes**, then the **secondary partner** must provide details about the client's identity and the services provided to that client. At this point, the secondary partner will receive an email notifying them that they have been added as a party to the PA.

   *  If **No**, you should enter the details yourself, and **signpost** the client to the relevant EEN Partner in their region.

Note: **Signposting** is recommended, to also give the foreign client the opportunity to benefit from Network services, but it is **not mandatory**. When signposting, you must comply with data protection laws. Specifically, you must always obtain the foreign client's consent before sharing their contact details with the EEN Partner in their region. You are never required to disclose any information related to the contents of the agreement, other than the foreign client's contact information.

4.  Select whether your client agrees on the publication of a success story related to the PA.

Note: If a client is not registered in Merlin, the partner must provide their contact details in the PA form **solely for the purpose of the PA**. Doing so does not imply that the client will have an account in Merlin.

Note: The **Secondary Partner** must confirm that they have completed and reviewed the content of the PA by checking the relevant box in this tab, otherwise the Main Partner will not be able to register the PA.

**Remember**: If the PA was put on hold by an Agency reviewer, the Main Partner can re-register it without the Secondary Partner's approval.

**Other partners involved**

In this tab you must mention any other partner who has assisted you in reaching the partnership agreement, as well as the services they have provided, such as:

   *  Signpost a client to the relevant Network Partner

   *  Organise Brokerage events

   *  Organise Company Missions

   *  Provide Sector Group Support, or

   *  Other auxiliary services that enabled the two partners to conclude the Partnership Agreement.

Such partners will be able to see the contents of the PA, except for the PA report.

**Important:** When confirming the involvement of a other such partners, it is mandatory to describe their contribution; to do so, select **Yes** for Services Provided, and describe the partner's contribution in the **Other Services Provided field**, by selecting the services indicated in the online help for this tab.

Click **Next** or the **PA Source** tab to continue.

### PA Source

The PA source is the activity that **directly** contributed to the PA. This source can be different, depending on whether the *other client* is assigned or not to an EEN partner.

**At least one source** must be selected. You can select multiple sources if they are related (e.g. an EOI made on a profile, which is also related to a Sector Group). In this case, only one is the main source of the PA, which you will need to specify in the Report tab.

Click **Next** or the **Report tab** to continue.

### Report

In the Report tab you should specify what the PA is about, the main source of the PA as well as your contribution and, if applicable, the contribution of other partners involved in reaching the PA.

When both partners have completed their work on the PA and agreed on its content, the main partner can submit the PA by clicking **Register** at the bottom of the PA form. Once submitted, the PA is shown in our **Registered** achievements dashboard and you can no longer modify its content.

**Important:** Check the online help for specific information about the contents of the report.

### Call

In the Call tab you should identify the details pertaining to the framework programme, call and proposal to which your partnership agreement was associated and submitted.

**Note:** The fields in this tab will be renamed in a future release, to ensure process consistency with the POD and the European Commission guidelines.

### PA Email Notifications

Notifications are sent to the various parties to a Partnership Agreement during the stages of drafting of the PA, namely:

- An email is sent to the Secondary Party and, if applicable, to the other partner involved when the Main Partner adds them to the PA.
- An email is sent to the Secondary Party and, if applicable, to the other partner involved, when the Main Partner removes them from the PA.
- An email is sent to the Main Partner when the Secondary Partner confirms having completed their work on the Partnership Agreement. Based on this notification, the Main Partner will then be able to register the PA.
- An email is sent to the Main Partner and the Agency when the Secondary and other partners involved **opt out** of the PA.
- An email is sent to the Main Partner and the Secondary Partner when the PA in which they are involved is put on hold.

## Registering an ASO

**Note:** Only report ASOs achieved after January 1, 2015 in the Achievements Database.

The workflow for registering an ASO is fairly similar to registering a PA, with a few differences, in particular:

- As an ASO is a relationship between one EEN Partner and their client, the main partner will be the only one completing all the steps to register the ASO. There is no Secondary Partner, but there can be other partners involved in the ASO.
- In certain cases, the outcome of an advisory service can be a partnership agreement with a foreign entity that your client has found themselves. The Main Partner is however **not required to signpost** the foreign client to a partner in the latter's region (if any). This is because the partner is not the one initiating the direct contact with the foreign client for the purposes of providing the advisory service.

To register an ASO, complete the steps described below.

On the Partnership dashboard, navigate to **Profiles > Achievements > New.** Click on **+** next to New and choose ASO to start drafting your advisory service outcome. The first tab of the ASO form will open:



The ASO form consists of the following tabs:

- Details
- Clients
- Other Partners Involved
- Report
- Comments - this tab only appears if the ASO was put on hold by an Agency Project Advisor and it displays the reviewer's comments.

When you are creating an ASO, go through each tab carefully and enter all of the necessary information. You can switch from one tab to another, and you can **save your draft ASO** at any time of the editing process. An internal reference is assigned automatically to the ASO, as soon as you save it for the first time.

---

**Note:** For detailed information on how to fill in each field, refer the online tooltips for each field marked with 🔵 .

---

### Details

In this tab you should specify the title and date of conclusion of the ASO, as well as the relevant Technology and Market keywords. Mandatory fields are marked with an asterisk (*).

When adding keywords you can click the ➕ icon to open the keyword picker. From the keyword picker you can add keywords by viewing and selecting keywords from the tree view. For further information please see the "Working with Technology, Market and NACE Keywords" section of this user guide.

Click **Next** or the **Clients** tab to continue.

### Clients

In this tab you should define the identity of the client that has benefited from your services.

1.  Select Yes/No to specify whether your client is already registered (they have an account in Merlin, regardless of whether or not they receive query results) or not, then provide the client information as required.
2.  Select the type of services you have provided to your client. You can check multiple services at the same time.
3.  Select whether your client agrees on the publication of a success story related to the ASO.

---

**Note:** If a client is not registered in Merlin, the partner must provide their contact details in the ASO form **solely for the purpose of the ASO**. Doing so does not imply that the client will have an account in Merlin.

---

### Other Partners Involved

In this tab you must mention any other partners involved partner who has assisted you in providing the advisory service to your client, as well as the services they have provided. When confirming the involvement of another assisting partner, it is mandatory to select **Yes** for Services Provided, and to describe the partner's contribution in the **Other Services Provided field**.

Other partners involved can be Thematic Contact Points, Sector Group representatives or any other partners having specific expertise which is not possessed by the partner in the contact with the client. Such partners can be based in the same country as the main partner or in another country.

---

**Note:** If you contacted a partner because they are a member of a Sector group, you must specify the Sector Group in the dedicated field.

---

The other partners involved will be able to see the contents of the ASO, except for the ASO report.

After filing in the details in this tab, click **Next** or the **Report tab** to continue.

### Report

In the Report tab you should specify the type(s) of advisory services that you provided, and give a detailed description of your contribution as well as, if applicable, the contribution of any other partners involved in the PA.

When you have completed the information in all the tabs of the form, click **Register** at the bottom of the ASO form to submit it. Once submitted, the ASO is shown in our **Registered** achievements dashboard and you can no longer modify its content.

**ASO email notifications**

The following email notifications are sent to the various parties to an Advisory Service Outcome during the stages of drafting of the ASO, namely:

- An email is sent to the other partner involved (if applicable) when the Main Partner adds them to the ASO.
- An email is sent to the other partner involved when the Main Partner removes them from the ASO.
- An email is sent to the Main Partner and the Agency when the other partners involved **opt out** of the ASO.
- An email is sent to the Main Partner when the ASO is put on hold by the Agency Project Advisor.

## Statement Letters

Partners involved in an achievements must obtain signed statement letters from their clients. These files are not attached to the online form registered via Merlin, but should be kept at hand for verification by the Agency staff (see "Achievement Review". For accepted titles, content, and other details regarding these letters, please refer to the *Eligibility guidelines*.

For Partnership Agreements:

- If two partners are involved, each partner must obtain a letter form their client.
- If one partner is involved, a single statement letter is expected, from the organisation specified under **My Client** section in the PA form.

## Achievement Review

Unlike profiles and events, PAs and ASOS are not subject to a validation procedure *per se*. Once an achievement has been registered, it is published automatically in Merlin. However, Agency staff will regularly perform ex-post checks on selected achievements (an ex-post check is verification of a PA after it has been registered)**.**

During such checks, the Agency PA Manager will also ask the partners involved in the PAs or ASOs to provide the statement letters signed by their respective clients.

When reviewing an achievement, the Agency PA Manager has the following options:

- **Put** the achievement **on hold**. The achievement is sent back to the partner(s) to make changes based on the reviewer's comments. The achievement is now shown in your **On hold** dashboard. After the main partner resubmits the updated achievement, it will be transferred to the **Registered** dashboard.
- **Reject** the achievement. The achievement is shown in the **Rejected** dashboard and the partner(s) can no longer edit it, but are able to view the reviewer's comments.

## Deleting an achievement

A PA or ASO can only be deleted when it is in **draft mode** or **on hold**. In addition, a PA can only be deleted by the partner who created it.

To delete the achievement, open it from the dashboard, then click **Delete** at the bottom of the form.

Note: Once deleted, the achievement is removed from your dashboard and cannot be retrieved.

## Resigning from an achievement

If you have been added as a Partner to a Partnership Agreement (either as a Secondary Partner or Other Partner Involved) or an Advisory Service Outcome (as Other Partner Involved) in which you should not be involved, you can withdraw from the achievement in question. To do so, open the achievement in either edit mode or view mode, and

click the **Resign from PA** or **Resign from ASO** button respectively, at the end of the form. The Main Partner and Agency will be notified of your withdrawal.

---

**Note:** You can only **resign from** an achievement while it is **a draft** or **on hold**. Once you resign, the achievement will be removed from your dashboard.

---

## Exporting Achievements

It is possible to export achievements involving your organisation as well as those involving all the organisations in your consortium:

1.  Navigate to **Profiles >Achievements > My Achievements** dashboard.

2.  Click the **Export My Organisation's Achievements to Excel** or the **Export My Consortium's Achievements to Excel** button respectively, to generate the xlsx file containing the requested achievements.

3.  To access the file, click the download arrow ⬇ in the "Download files" dialog, then follow the on-screen instructions to open the generated file directly or to save it to your computer.



| File Name | Type | Size | Action |
|---|---|---|---|
| My Organisation's Achievements Report19-11-2014_110407 | xlsx | 15.0 kB | ⬇ |
| Files generated in 8.82 seconds | | | |
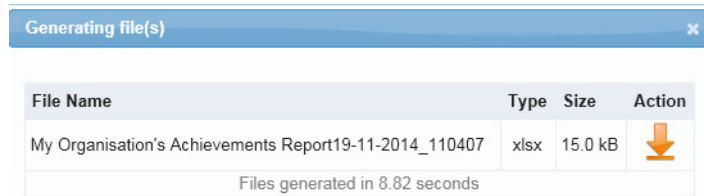
The Excel file includes all the achievements with details, regardless of their status.

For Consortium achievements, all details except the client names and the reports are available.

For each of the achievements registered by your organisation, the excel file also contains a link to the PA or ASO form in question, with further details, such as the report.

## New Section

### Applying Heading

Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text

# 16. Sector Groups

## About Sector Groups

A Sector Group (SG) is a group of Network partners who commit to work together in order to meet the specific needs of their clients operating in a particular sector. In other words, Sector Groups - chaired by a Network partner - represent a framework to discuss, plan and implement collaborative operations in order to provide client companies with services with a European added value.

The mission of the Sector Groups established within the Enterprise Europe Network is to enhance cooperation on specific subject matters / service areas of the Network.

All Sector Groups follow common guidelines, publish their rolling plan and their list of members on the Enterprise Europe Network intranet and report on their activities. Therefore, membership is open to all Network Partners which have interest in participating to common activities and share their experience.

The list of available Sector Groups can be found on the intranet: http://een.ec.europa.eu/my/n/sector-groups. Click on a Sector Group in the list to see a description of its activities as well as its members.

For more information about Sector Groups, eligibility rules and sector group activities please refer to the Sector Group Guide and the related documents, which are available on the intranet: https://webgate.acceptance.ec.europa.eu/een/my/intranet/about-sector-groups.

### Sector Group Roles and Responsibilities

### SG Chairs and Deputy Chairs

SG chairs promote activities and results and encourage new members to get involved. EASME organises coordination meetings involving SG Chairs twice a year. In this context, Chairpersons present their rolling plans, exchange good practices and discuss general issues of common interest. SG members will elect a Chairperson and a deputy Chairperson with a renewable annual mandate. The chair and the deputy chairperson will be responsible for:

- Ensuring the appropriate communication within the SG, with other SGs, relevant actors and vis à vis EASME
- Drafting an annual SG rolling plan with the inputs of the SG members
- Collecting data for reporting to be included in the annual report (EASME will publish this information on the intranet)
- Providing the responsible Project Officers in EASME with the draft agenda of the SG meetings

Although the intention is to keep the administrative burden for SGs to a minimum, a lot of work is involved if everything is managed by the Chairperson. SG members are therefore encouraged to adopt a structured organisation and share the work. It is understood that the Chairperson (and the deputy Chairperson) will keep the overall coordination and representation of the SG. Beyond that, several tasks could be delegated to group members such as:

- Updating the rolling plan
- Provide the Chair(s) with information for the reporting template(s)
- Updating the intranet and possibly a public SG page
- Ensure in particular that the list of members is updated

- Preparing flyers and other communication tools
- Identifying good practices generated by the SG
- Managing specific projects for the group
- Liaison with other SGs
- Connection to external stakeholders

**EASME Project Officers**

Following the "bottom-up approach", the main objective of EASME Project Officers is to encourage SGs' capacity to foster innovation and business cooperation as well as their commitment for quality. Concretely, EASME Project Officers contribute to:

- Establish the sector group guidelines
- Facilitate the coordination, experience sharing and creating synergies
- Monitor the progress of the sector groups
- Support the communication of each SG for the best exploitation of results
- Provide Intranet and Extranet pages
- EASME Project Officers will participate in at least one meeting of the SGs per year.

## My Sector Groups Dashboard

All applications for membership and resignations from a Sector Groups are made via the Sector Group Module in Merlin. The Sector Groups Dashboard, accessible via **Partnering> Network> Sector Groups> My Sector Groups**, is the main area where users can **view** the details of their current membership, **resign** from Sector Groups (via the Member Detail page), as well as **join** a new Sector Group, provided they are not already a member of two other Sector Groups.

In addition SG Chairs and Project Officers use this dashboard to manage the group description and membership.



| Name | Create Date | Status | Member Detail | Manage Sector Group |
|------|-------------|--------|---------------|---------------------|
| Environment | 31 Jan 2014 | Approved | 🔍 | ✏️ |

## Sector Group Membership

### Joining a Sector Group

Sector Group (SG) membership is open to all EEN Partners and is limited to **two sector groups per person**.

Before applying, please consult the eligibility rules, get the approval of your EEN project manager in your host organisation, prepare the regional profile and keep an electronic version of a signed and completed letter of commitment ready, and if applicable, a copy of the annex to the letter of commitment. If several members of the same organisation are applying, all members should provide a copy of the same Letter of commitment (with option 2 filled in) and a regional profile. The first member nominated in the letter of commitment is deemed the main representative of the partner organisation to the Sector Group in question. The required files for applying to join a Sector Group can be downloaded directly from the application page in Merlin and are also found on the intranet: http://een.ec.europa.eu/my/intranet/about-sector-groups.

**Note:** Please make sure that your network directory profile is always accurate and up to date. This is a mandatory condition for being a member of any sector group.

Membership applications are reviewed by the Sector Group Chair and subsequently by an Agency Project Officer. In case of unavailability of the Sector Group Chair, the Project Officer can unilaterally approve or reject membership applications and resignation requests.

**Note:** Sector Group Chairs and Deputy Chairs must go through the same procedure of joining Sector Groups in Merlin as the other members of Enterprise Europe Network. Their roles will be assigned subsequently by the Sector Group Officer.

To join a Sector Group:

1. Navigate to your Sector Groups Dashboard: **Partnering> Network > My Sector Groups.**
2. Click **Join Sector Group.** You will be directed to the **Join Sector Group** page:



3. **Select** the Sector Group you wish to join in the drop-down list.

4. In the **Motivation** field, describe your reasons for applying to be a member of the selected Sector Group. The field is limited to 4000 characters, including spaces.

5. **Complete and upload** the Letter of Commitment, the Regional Profile Template, and if applicable, the Annex to the Letter of Commitment, to support your application. The templates for these files are found in the same page.

6. Click **Join**. Your application is submitted to the SG Chair and the Project Officer, who can approve, put on hold or reject your application. You can check the status of your application in the **Status** column of your dashboard.

---

**Note:** At this stage, you can view your application and resign from the Sector Group without requiring approval, as long as the Chair or Project Officer do not approve of your application. However, it is no longer possible to modify your application at this point.

---

7. a) If your membership application is approved by the Chair, it will be forwarded for approval to the Sector Group Officer and its status in your dashboard changes to *Pending for Officer*. Proceed to step 8.

   b) If your membership application is put on hold by the Chair, the status of your application changes to *On Hold from Chair*. At this point you can decide to leave the group without requiring approval by the Chair or the PO, or update your application based on the Chair's comments:

   - In the Sector Groups Dashboard, click the icon 🔍 next to the sector group in question, to access your Membership details page, then click the **Update Membership Application** button.
   - The Update Membership Application page will open. Here you can delete and re-upload the application files as necessary, and leave a comment for the Chairs and Project Officers. When you have finished updating your application, click **Save** to submit your application again. Your application will follow the same approval process as described above.

8. The Sector Group Officer is able to view any comments or updates that have been made on your application at all stages of your application process. The Sector Group Office can:

   a) approve your application, after it has been approved by the Chair or unilaterally, in case of unavailability of the Chair. Thus, you become a fully-fledged member of the Sector Group, and the status of your application in the Sector Groups Dashboard changes to *Approved*.

   b) put your application on hold, even though it has been approved by the Chair. If so, you will need to update your application, based on the Officer's comments (see step 7b for instructions). In this case, however, your updated application is submitted directly to the Sector Group Officer and the status in your dashboard changes to *Pending for Officer*.

   c) reject your application - the application is removed from your Sector Groups Dashboard.

If you have any questions regarding your membership application to a specific Sector Group, please contact the Chair of the Sector Group in question.

## Viewing your membership details

To view your membership details for a specific Sector Group:

Go to My Sector Groups Dashboard, and click the spyglass icon 🔍 next to the desired SG entry to open the specific membership details page. This page displays information such as your application date, your motivation, your role if you are the Chair or Deputy Chair, and any comments from the Sector Group Officers that were made during your application.

:



You can also use this page to access your network profile and resign from the said Sector Group.

## Resigning from a Sector Group

To resign from a sector group:

1. Go to My Sector Groups Dashboard, and click the spyglass icon 🔍 next to the desired SG entry to open your membership details for that SG.
2. At the bottom of the details page, click the **Resign from this Sector Group** button.
3. In the dialog that opens, provide a reason for your resignation and click the **Resign from Sector Group** button. Your resignation will be submitted to the Chair and your membership status changes to **On resignation by Chair** in the Sector Groups Dashboard. At this stage you can still consult your membership details page.



4. Once your resignation request is approved by the Chair, it will be forwarded to the Sector Group Officer, and your membership status changes to **On resignation by Officer** in the Sector Groups Dashboard.
5. Once your resignation request is approved by the Sector Group Officer, the SG details are automatically removed from your dashboard and you will no longer have access to you membership details.

## SG Email notifications

As a sector group member you will receive am email when your application is approved by the PO, when it is put on hold, and/or when you are removed from the Sector Group.

## Sector Group Management Dashboard (SG Chairs Only)

**Note:** Sector Group Chairs must first join their group via Merlin following the same procedure as the other members of Enterprise Europe Network. The Sector Group Officers in charge of the relevant group will then assign the Chair roles to the designated members.

As a Sector Group Chair, you are in charge of managing membership applications from EEN Partners and resignation requests submitted by members in your Sector Group via Merlin. This is done via the **Sector Group Management dashboard**. To access this dashboard, go to **Network > My Sector Groups**.

| Name | Create Date | Status | Member Detail | Manage Sector Group |
|------|-------------|--------|---------------|---------------------|
| Environment | 31 Jan 2014 | Approved | 🔍 | ✏️ |

Click the Manage Sector Group icon ✏️ next to the name of the relevant sector group to open the Sector Group Management dashboard.

### Environment - Management

**Description**

The Sector Group's mission is to contribute to the development and competitiveness of SMEs and other organisations in the environmental sector through the mediation of partnerships, exploitation of research results, identification of financing schemes and provision of other support mechanisms in the areas of commerce, innovation and technology, and R&D. This will be implemented through a broad spectrum of services, ranging from information provision to specific events and individual consulting and advice.

**Members**

? **Pending Chair's Approval**

| Name | Create Date | Detail |
|------|-------------|--------|
| Jonathan Cooper | 13 Aug 2014 | 🔍 |

Displaying items 1 - 1 of 1

? **Approved**

| Name | Create Date | Detail |
|------|-------------|--------|
| Adrian Rzadkiewicz | 31 Jan 2014 | 🔍 |
| Agata Wylegala | 31 Jan 2014 | 🔍 |
| Alessandro 2 Chiesa | 31 Jan 2014 | 🔍 |
| Ana Niksic | 31 Jan 2014 | 🔍 |
| Anis Mourad | 31 Jan 2014 | 🔍 |
| Anna Izbinska | 31 Jan 2014 | 🔍 |
| Antonija Cerar | 31 Jan 2014 | 🔍 |
| Arturo Anton | 31 Jan 2014 | 🔍 |
| Beate Schutte | 31 Jan 2014 | 🔍 |
| BERIL KIRCI | 31 Jan 2014 | 🔍 |

1 2 3 4 5 6   Displaying items 1 - 10 of 53

? **Resignation Pending Approval by Sector Group Chair**

| Name | Create Date | Detail |
|------|-------------|--------|
| No records to display. | | |

Displaying items 0 - 0 of 0

? **On Hold by Chair**

| Name | Create Date | Detail |
|------|-------------|--------|
| No records to display. | | |

Displaying items 0 - 0 of 0

Delete this Group     Back to My Sector Groups

The dashboard consists of the following tables:

- **Pending Chair's Approval** - these are membership applications awaiting action from you.
- **Approved** - the list of EEN members that have been approved by the Project Officer and who are now fully-fledged members of the Sector Group.
- **Resignation Pending Approval by Sector Group Chair** - members who have requested to leave the group and who await your approval. Once you approve their resignation, their request will be forwarded to the PO for final approval.
- **On Hold by Chair** - member applications that you have put on hold. Once the member has updated and re-submitted their application, the application will be listed in the "pending Chair's Approval" table.

Click the spyglass icon ⊝ next to a name to see the member's / applicant's details and perform actions as required.

Refer to the instructions in this chapter for further details on managing membership.

## Approving membership applications

To approve a membership application:

1. Go to your Sector Group's management dashboard, and in the **Pending Chair's Approval** table, click the icon ⊝ to access the member's application details:



2. Click the **Approve/Put on Hold** button.
3. In the dialog that opens, leave a comment (optional) and click **Approve**. The partner's membership application will be transferred to the Agency Project Officer for approval. At this point, it disappears from your dashboard. If approved by the PO, the new member will be listed in the **Approved** table in your management dashboard.

## Putting membership applications on hold

1. Go to your Sector Group's management dashboard, and in the **Pending Chair's Approval** table, click the icon ⊝ to access the member's application details.
2. Click the **Approve/Put on Hold** button.
3. In the dialog that opens, provide a reason (mandatory) and click **Put on Hold**.



Your comment will be displayed in the applicant's page and is visible to the applicant, the chair, and the POs.

4. At this point, the application is moved to the **On Hold by Chair** table in your management dashboard, where you can still access its details.

5. Once the applicant has updated and resubmitted their application, it will re-appear in the **Pending Chair's Approval** table, and you can decide whether to approve or put the application on hold again.

**Rejecting membership applications**

Membership applications can only be rejected by Project Officers. Therefore, if you deem that an applicant is not eligible to become a member of the sector group you are chairing, please contact the project Officer responsible for your group, who will be able to reject their application.

## Approving resignations

When a member wishes to leave your sector group, they will submit a resignation request via Merlin, which needs to be approved by the Chair, and subsequently by the Project Officer in charge of your group.

To approve a member's resignation as Chair, do the following:

1. Go to your Sector Group's management dashboard, and in the **Resignation Pending Approval by Sector Group Chair** table, click the icon 🔍 to access the member's application details.

2. Click the **Confirm member resignation** button.

3. In the pop-up dialog, **make sure you check the box confirming the member's resignation**. If you leave this box unchecked, once you click the Confirm button, the user's status will be set back to Approved.



4. Optionally, leave a comment in the text box. The comment will be visible to both the member, and the PO.

5. Click the **Confirm** button. At this point, the member's request disappears from your dashboard and is forwarded to the POs dashboard for approval.

# 16. Account Management

The following chapter will look at all aspects relating to managing your user data in the Network. This includes the impact of data protection, data migration and notifications in Merlin and also the tasks that you as a user will be able to perform including:

- Reactivating your account (Forgotten password)
- Modifying your data

Merlin has been developed with the user at the forefront of every process. This allows you to easily adapt data yourself in order to reduce time spent contacting the helpdesk and support teams for making changes to your account.

Certain important functionality relating to your account can only be undertaken by your Partner Administrator, however the Partner Administrator will never be able to change your personal data. The actions a Partner Administrator can do include:

- Adding a new user
- Modifying user accounts / user roles
- User deactivation
- Modifying organisation data (Agency approval required)
- Reassigning user data

For further information and to learn how to undertake these tasks please refer to the *Partner Administrator User Guide.*

## Forgot My Password / Reactivate My Account

In the event of you forgetting your password (entering your password incorrectly 3 times) or not logging in to Merlin for 1 month you will need to reactivate your account. You can do this without having to contact anybody from the IT helpdesk to fix this problem.

### Account Rules

An account is deactivated if the user does not connect to Merlin for one month **or** if the user enters an incorrect password 3 times at log in. You can reactivate your account by following the **forgot your password / reactivate your account** instructions below.

If your account is **blocked** you will have **no access** to any of your Merlin spaces **even** if you use your correct password. Accounts are blocked by the Partner Administrator of your organisation if it is decided that you are not allowed to access the system any longer for security reasons (e.g. a person goes on extended leave/maternity but will return to the organisation in the future). All notifications, profiles, events and clients will remain active in your name if your account is blocked. Only your Partner Administrator can unblock your account for you.

Accounts are deleted if a user leaves the organisation. This is a task managed by the Partner Administrator who will need to reassign all information assigned to you. The data of deleted users will remain in the system for an extended period of time to allow for reporting; however for data protection reasons, such data will not be editable.

To reactivate your account and/or reset your password for Merlin do the following:

1. On the intranet homepage click the **Request a new password** link. The request a new password page will open:



2. Enter your email address that you currently use to access all EEN tools and click **Submit.** An email will be sent to you containing your username and a link to reset your password. **Remember:** If the email does not arrive immediately, please check your Junk Mail folders.

3. Click the link provided in the email. A web page will open where you can change your password:



4. Enter your new password and re-enter it to confirm. **Remember:** Choose a password that is memorable to you as this will be needed to log in to Merlin every time. The password requirements will be indicated on the web page. Please ensure that your password matches those conventions.

5. Click **Save**. A notification window will open to say that the process is complete.

6. Navigate to the **Sign in** tab on the website and enter your username and new password where required.

7. Click **Sign in.** The Merlin dashboard will open and you will be able to use Merlin again.

## My User Profile

The My User Profile section of Merlin is where you can modify your user data including determining if your data is made available to the public or not. It is your responsibility to determine which data you would like to show.

To access your user profile from anywhere in the intranet, click on your name at the top of the page. You will navigate to your profile page where you can view a summary of your personal information, as well as update your profile and your password.

To view your profile in detail, scroll down to the bottom of the page and click **Edit my user profile**.

### A Note about Data Protection

Data protection is a matter the Agency takes very seriously. Merlin has been developed to conform to strict data protection rules. This means that you will have full control over the information that is displayed to others safe in the knowledge that information will not be disseminated without your agreement. You have full control to decide what is shown to other users. None of the fields in the edit user profile window are mandatory so you can select how much information you show. This means that you can decide if you show phone numbers, GSM numbers, email addresses by simply leaving fields empty where you do not want to provide information.

It is your responsibility to update your own information including your email addresses in Merlin. Your Partner Administrator cannot do this for you. You can update your information at any time.

Additionally, there is a check box in the **edit user profile** window of Merlin that you should tick if you agree to show your profile. If the tick box is unchecked then your data will not be shown to the public. However, please be aware that leaving the tick box unchecked will have a large impact on certain functionality that you can use in Merlin. For example, you will not be able to access the Forums, your name will not appear on any profiles, so you will not be able to be the contact person for profiles or events that you create and you will not be able to be the contact person for clients.

Note: If you decide to un-tick the "public" box at a later date you will need to reassign all your clients, profiles and events for which you were the contact person when your data was visible.

### Email Addresses

In Merlin, it is possible to have multiple email addresses assigned to a user. The email addresses are distinguished between system email addresses and standard email addresses.

You must indicate a system email address in Merlin which must be personal to you e.g. 'a.person@organisation.xyz.de'. This **cannot** be a generic email address of the organisation (info@organisation.xyz.be) because it is the email address to

which **you** will receive notification emails from Merlin. The system address is not seen by anyone except the Partner Administrator of your organisation.
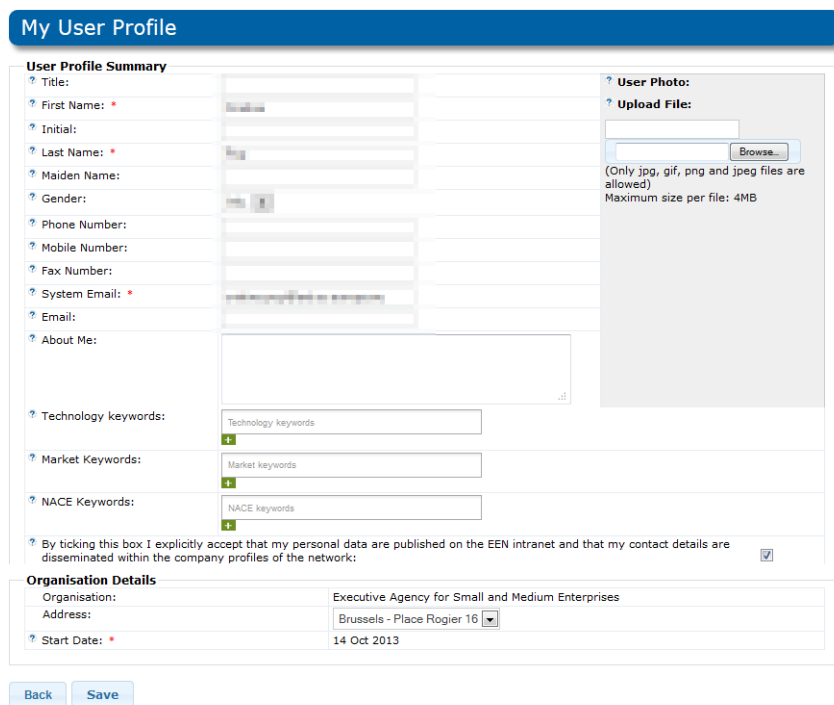
You can also include a standard email address which is visible to all users. It is possible to choose whether this email is shown in the network directory by editing your user in the user management dashboard.

The standard email address will not receive notifications but it will be visible on profiles that you create.

### Edit My Profile

To edit your profile data, do the following:

1. Click on your name at the top of the page, anywhere in Merlin. This will bring up your **profile summary** page.

2. Scroll down to the **My user profile - operations** section, and click **Edit My Profile.** Alternatively, click the icon in the top right corner of your intranet home page, next to your name. Your detailed profile page will open, where you can edit your information:



3. Make changes as desired.

---

**Note:** Remember that if you do not want certain data to be shown, simply leave the field blank. Only fields marked with * need to be populated.

---

**Note:** If you are a Legal Representative and decide to change your name (first name and/or last name) then you will be prompted to attach the relevant documentation to support your changes. When you save your changes these will need to be approved by the Agency. Once the Agency approves the changes they will be reflected in your My User Profile page.

4. Check the **Email** field to ensure that it is correct for you.

---

**Note:** Remember the **Email** field is the email you assign to be visible to other users on Profiles, Events and contact. You may change this email as required.

The **System email** field is mandatory as it is your address where you receive Merlin notification emails. This is not visible to anyone except you and the Partner Administrator of your organisation.

5.  Tick/Untick the **Profile** check box to determine if your data is going to be visible to other users. If the checkbox is ticked, your data will be visible to the public.

**Note:** If you change your profile from being visible to invisible then you will need to reassign all existing events, profiles and clients (if you are default client contact). Your data will remain on all active profiles, events and available to clients that you have created/manage **until** you reassign them to another member of your organisation.

6.  Click **Save** to save your changes or **Back** to cancel all changes and return to the Profile summary page.

## Change My Password

It is possible to change your password for accessing Merlin, the intranet and forums at any time without having to contact the IT Helpdesk.

To change your password in Merlin, do the following:

1.  Click on your name at the top of the page, from anywhere in the intranet. This will bring up your **profile summary** page.
2.  Scroll down to the **My user profile - operations section**, and click **Change my password.** Alternatively, click the

    icon 🔑 in the top left corner of your intranet home page, next to your name. The change password window will open.

**Change Password**

Please, complete the form below in order to change your password.

Password must contain a minimum of 6 characters in length.
Password must contain at least 1 uppercase letter.
Password must contain at least 1 lowercase letter.

**Account Information**

New password:

[                                    ]

Confirm new password:

[                                    ]

[ Save ]

3.  Type your **New Password** and the re-enter it to confirm.

**Note:** Please ensure that your new password adheres to the password conventions shown on the page.

4.  Click **Save.** Your new password will be saved. The next time you sign in to Merlin, the intranet or the Forums you will need to use the new password.

# Appendix A: Market keywords

The detailed Market keywords are structured in 9 main sectors (Level 1), 68 sub sectors (Level 2) and 271 specific branches (Level 3):

1. 001 - Communications
2. 002 - Computer Related
3. 003 - Other Electronics Related
4. 004 - Genetic Engineering / Molecular Biology
5. 005 - Medical/Health Related
6. 006 - Energy
7. 007 - Consumer Related
8. 008 - Industrial Products
9. 009 - Other

The Market keywords list was updated in Q4 2013. In this version, the obsolete keywords that have been removed from the Merlin database are written in red, while newly added keywords are written in blue, and keywords that have changed level are written in green. You can still use obsolete keywords to search for profiles created before the list was updated, but you will not be able to use them when creating new profiles.

**Note:** When creating a new profile for a client in Merlin, you must use level 3 keywords in order to provide as much information as possible about the profile. When creating a new event, you can select level 1 or level 2 keywords.

## 001 - Communications

**1    Commercial Communications (001001)**

    1.1    Radio and TV broadcasting stations (001001001)

    1.2    CATV and pay TV systems (001001002)

    1.3    Radio and TV broadcasting and other related equipment (001001003)

    1.4    Other commercial communications (001001004)

**2    Telephone Related (001002)**

    2.1    Long distance telephone services (001002001)

    2.2    Telephone interconnect and other equipment (001002002)

    2.3    Message forwarding, queuing and answering systems, telephone management systems and PBXs (001002003)

    2.4    Other telephone related (including telephone cost accounting systems, telephone related telephone test systems and telephone answering service equipment) (001002004)

**3    Facsimile Transmission (001003)**

**4    Data Communications (001004)**

    4.1    Local area networks (including voice/data PBX systems) (001004001)

    4.2    Data communication components (001004002)

    4.3    Communications processors/network management (001004003)

    4.4    Protocol converters and emulators (001004004)

4.5      Modems and multiplexers (001004005)

4.6      Other data communication components (001004006)

4.7      Network test, monitoring and support equipment (001004007)

4.8      Other data communications (001004008)

**5      Satellite Microwave Communications (001005)**

5.1      Satellite services/carriers/operators (001005001)

5.2      Satellite ground (and others) equipment (001005002)

5.3      Microwave service facilities (001005003)

5.4      Microwave and satellite components (including antennae and amplifiers)  (001005004)

5.5      Other satellite/microwave (001005005)

**6      Other Communications Related (001006)**

6.1      Defence communications (001006001)

6.2      Mobile communications, pagers and cellular radio (001006002)

6.3      Other communications (not elsewhere classified) (001006003)

6.4      Communications services (001006004)

6.5      Streaming (001006005)


## 002 - Computer Related

**1      Computers (002001)**

1.1      Mainframe and scientific computers (002001001)

1.2      Mainframes (002001002)

1.3      Scientific computers  (002001003)

1.4      Mini and micro computers  (002001004)

1.5      Fail safe computers  (002001005)

1.6      Mini computers (small business)  (002001006)

1.7      Micro computers (personal and very small)  (002001007)

1.8      Other mini and micro computers (002001008)

**2      Computer Related Graphics (002002)**

2.1      CAD/CAM, CAE systems (002002001)

2.2      Graphics systems (002002002)

2.3      Graphics software (002002003)

2.4      Graphics terminals (002002004)

2.5      Graphics printers/plotters (002002005)

2.6      Other graphics peripherals (002002006)

2.7      Other computer graphics (002002007)

2.8      3D (002002008)

**3      Specialised Turnkey Systems (002003)**

**4      Scanning Related (002004)**

4.1      OCR (optical character recognition) (002004001)

4.2      OBR (optical bar recognition) (002004002)

4.3      MICR (magnetic ink character recognition) (002004003)

4.4      Other scanning related (including optical mark sensing and image processing) (002004004)

**5      Peripherals (002005)**

5.1      Terminals (002005001)

5.2      Intelligent terminals (002005002)

5.3      Portable terminals  (002005003)

5.4      Other terminals  (002005004)

5.5      Printers  (002005005)

5.6     Data I/O devices  (002005006)

5.7     Disk related memory devices  (002005007)

5.8     Floppy disks and drivers  (002005008)

5.9     Winchester disks and drives  (002005009)

5.10    Optical disks and drives  (002005010)

5.11    Other disk related  (002005011)

5.12    Tape related devices  (002005012)

5.13    Magnetic tapes  (002005013)

5.14    Tape heads and drives  (002005014)

5.15    Continuous tape backup systems  (002005015)

5.16    Other tape related devices  (002005016)

5.17    Other memory devices (excluding semiconductors)  (002005017)

5.18    Other peripherals (not elsewhere classified) (002005018)

**6      Computer Services (002006)**

6.1     Time sharing films  (002006001)

6.2     Computer leasing and rentals (002006002)

6.3     Computer training services  (002006003)

6.4     Data processing, analysis and input services  (002006004)

6.5     Computerised billing and accounting services  (002006005)

6.6     Databases and on-line information services  (002006006)

6.7     Other computer services  (002006007)

6.8     Storage (002006008)

6.9     Big data management (002006009)

**7      Computer Software (002007)**

7.1     Systems Software (002007001)

7.2     Database and file management (002007002)

7.3     Operating systems and utilities (002007003)

7.4     Program development tools/languages (002007004)

7.5     Communications/networking (002007005)

7.6     Other system software (002007006)

7.7     Applications software (002007007)

7.8     Business and office (002007008)

7.9     Home (002007009)

7.10    Education (002007010)

7.11    Manufacturing/industrial (002007011)

7.12    Medical/health (002007012)

7.13    Banks/financial institution (002007013)

7.14    Other industry specific (002007014)

7.15    Integrated software (002007015)

7.16    Artificial intelligence related software (002007016)

7.17    Expert systems (002007017)

7.18    Natural language (002007018)

7.19    Computer-aided instructions (002007019)

7.20    AI programming aids (002007020)

7.21    Other AI related (002007021)

7.22    Software services (002007022)

7.23    Programming services/systems engineering (002007023)

7.24    Consulting services (002007024)

7.25    Distribution, clearing house (002007025)

7.26    Other software services (002007026)

7.27    Other software related (002007027)

7.28    Web semantics (002007028)

**8    Other Computer Related (002008)**

8.1    Voice synthesis (002008001)

8.2    Voice recognition (002008002)


## 003 - Other Electronics Related

**1    Electronic Components (003001)**

1.1    Semiconductors (003001001)

1.2    Customised semiconductors  (003001002)

1.3    Standard semiconductors  (003001003)

1.4    Other semiconductors (003001004)

1.5    Microprocessors  (003001005)

1.6    Controllers  (003001006)

1.7    Circuit boards  (003001007)

1.8    Display panels  (003001008)

1.9    Other electronics related (including keyboards) (003001009)

**2    Batteries (003002)**

**3    Power Supplies (003003)**

**4    Electronics Related Equipment (003004)**

4.1    Semiconductor fabrication equipment and wafer products (003004001)

4.2    Components testing equipment (003004002)

4.3    Other electronics related equipment (003004003)

**5    Laser Related (003005)**

**6    Fibre Optics (003006)**

**7    Analytical and Scientific Instrumentation (003007)**

7.1    Chromatographs and related laboratory equipment (including spectrometers) (003007001)

7.2    Other measuring devices (including infrared gas analysers, moisture analysers) (003007002)

7.3    Other analytical and scientific instrumentation (003007003)

**8    Other Electronics Related (003008)**

8.1    Military electronics (excluding communications) (003008001)

8.2    Copiers  (003008002)

8.3    Calculators  (003008003)

8.4    Other electronics related (including alarm systems) (003008004)


## 004 - Genetic Engineering / Molecular Biology

**1    Recombinant DNA (004001)**

1.1    Agricultural genetic engineering applications (004001001)

1.2    Industrial genetic engineering applications (004001002)

1.3    Medical genetic engineering applications (004001003)

1.4    Other recombinant DNA (004001004)

**2    Monoclonal Antibodies and Hybridomas (004002)**

**3    Gene Splicing and Manufacturing Equipment (004003)**

**4    Other Genetic Engineering (004004)**

**5    Molecular design (004005)**

**6      Microbiology (004006)**

**7      Micro- and Nanotechnology related to Biological sciences (004007)**

**8      Biochemistry / Biophysics (004008)**

**9      Toxicology(004009)**

**10     In vitro Testing, Trials(004010)**

**11     Stem cells and biobanks (004011)**

**12     Cellular and Molecular Biology (004012)**

**13     Population genetics (004013)**

**14     Gene Expression, Proteom Research (004014)**

**15     Bioinformatics (004015)**

**16     Enzymology/Protein Engineering/Fermentation (004016)**

**17     Genetic Engineering (004017)**


## 005 - Medical/Health Related

**1      Diagnostic (005001)**

    1.1      Diagnostic services (005001001)

    1.2      Medical imaging (005001002)

    1.3      X-rays   (005001003)

    1.4      CAT scanning (005001004)

    1.5      Ultrasound imaging (005001005)

    1.6      Nuclear imaging (005001006)

    1.7       Other (005001007)

    1.8      Diagnostic test products and equipment (005001008)

    1.9      Other diagnostic (005001009)

    1.10     Molecular diagnosis (005001010)

    1.11     Differential diagnosis (005001011)

    1.12     In-vitro diagnostics (005001012)

    1.13     Prenatal diagnostic (005001013)

    1.14     Forensic science (005001014)

**2      Therapeutic (005002)**

    2.1      Therapeutic services (005002001)

    2.2      Surgical instrumentation and equipment (005002002)

    2.3      Pacemakers and artificial organs(005002003)

    2.4      Drug delivery and other equipment (including kidney dialysis machines) (005002004)

    2.5      Other therapeutic (including defibrillators) (005002005)

    2.6      Surgical implants (005002006)

**3      Other Medical/Health Related (005003)**

    3.1      Disposable products (005003001)

    3.2      Pharmaceuticals/fine chemicals (005003002)

    3.3      Handicap aids (005003003)

    3.4      Monitoring equipment (005003004)

    3.5      Hospital and other institutional management (including management services and leasing) (005003005)

    3.6      Other medical/health related (not elsewhere classified) (005003006)

    3.7      Computer-aided diagnosis and therapy (005003007)

**4      Agro and Marine biotech (005004)**

    4.1      Food and feed ingredients (005004001)

    4.2      Marine oils (005004002)

    4.1      Marine products (005004003)

**5**    **Anatomy, Pathology, Immunology, Physiology (005005)**

**6**    **Clinical Medicine (005006)**

6.1      Forensic Medicine (005006001)

6.2      Oncology (005006002)

6.3      Paediatrics (005006003)

6.4      Emergency medicine (005006004)

6.5      Surgery and Anaesthesiology (005006005)

6.6      Orthopaedics (005006006)

6.7      Gastroenterology (005006007)

6.8      Geriatrics (005006008)

6.9      Environmental Medicine, Social Medicine, Sports Medicine (005006009)

6.1      Allergy research (005006010)

6.2      Medical computer sciences (005006011)

6.3      Nephrology (005006012)

6.4      Medical Physics, Physiology (005006013)

6.5      Circulatory diseases (005006014)

6.6      Endocrinology (005006015)

6.7      Dentistry / Odontology, Stomatology (500006016)

6.8      Internal medicine (005006017)

6.9      Other (005006018)

6.10     Cardiology (005006019)

6.11     Ophthalmology, ear, nose and throat diseases (005006020)

6.12     Pulmonary medicine (005006021)

6.13     Gynaecology (005006022)

**7**    **Medical equipment (005007)**

7.1      Electromedical and medical equipment (005007001)

7.2      Rescue and emergency equipment (005007002)

7.3      Surgical instrumentation and equipment (005007003)

7.4      Medical instruments (005007004)

7.5      Diagnostic equipment (005007005)

7.6      Laboratory equipment (005007006)

**8**    **Welfare technologies (005008)**

8.1      Patient rehabilitation & training (005008001)

8.1      Safety for elderly (005008002)

8.2      Cognitive aid (005008003)

**9**    **Plant and animal health (005009)**

9.1      Fish health (005009001)

9.2      Animal health (005009002)

9.3      Plant health (005009003)

9.1      Food & feed ingredients (005009004)

## 006 - Energy

**1**    **Oil and Gas Exploration and Production (006001)**

1.1      Storage and transportation (006001001)

1.1      Exploration services (006001002)

1.2      Equipment and instrumentation (006001003)

1.3      Chemicals and materials (006001004)

1.4      Drilling, completion and stimulation (006001005)

    1.5       Production services (006001006)

**2     Exploration Services (006002)**

**3     Drilling and Support Services (006003)**

**4     Oil and Gas Drilling, Exploration and Extraction Equipment (006004)**

    4.1       Drilling and extraction equipment (006004001)

    4.2       Drilling instrumentation (006004002)

    4.3       Exploration equipment instrumentation (006004003)

    4.4       Other oil and gas (006004004)

**5     Alternative Energy (006005)**

    5.1       Solar energy (006005001)

    5.2       Photovoltaic solar (006005002)

    5.3       Other solar (006005003)

    5.4       Wind energy (006005004)

    5.5       Geothermal energy (006005005)

    5.6       Co-generation (006005006)

    5.7       Other alternative energy (including nuclear energy and uranium mining) (006005007)

    5.8       District heating (006005008)

    5.9       Combined heat and power (co-generation) (006005009)

    5.10      Other alternative energy (006005010)

    5.11      Marine energy (006005011)

    5.12      Solar/thermal energy (006005012)

    5.13      Distributed power and grid connection (006005013)

    5.14      Photovoltaics (006005014)

    5.15      Biomass and Biofuels (006005015)

**6     Enhanced Oil Recovery/Heavy Oil/Shale (006006)**

**7     Coal Related (006007)**

    7.1       Coal mining  (006007001)

    7.2       Coal related equipment (006007002)

    7.3       Other coal related (006007003)

**8     Energy Conservation Related (006008)**

    8.1       Metering and monitoring (006008001)

    8.1       Thermal insulation (006008002)

    8.2       Heat recovery (006008003)

**9     Other Energy (006009)**

    9.1       Other energy production (006009001)

**10    Power generation (006010)**

    10.1      Oil, gas and coal (006010001)

    10.2      Hydro-electric (006010002)

    10.3      Nuclear (6010003)

    10.4      Power grid and distribution (006010004)

**11    Enhanced Oil Recovery (EOI) (006011)**

    11.1      Gas, liquid and chemical injection (006011001)

    11.2      EOI other (006011002)

    11.3      Heavy oil/shales (006001003)

**12    Energy Supply and Retail (006012)**

    12.1      Energy for private/domestic housing (006012001)

    12.2      Energy for Industry (006012002)

    12.3      Energy for the community/public sector (006012003)

**13   Energy Distribution (006013)**

**14   Energy Storage (006014)**

**15   Energy for Transport (006015)**

# 007 - Consumer Related

**1    Leisure and Recreational Products and Services (007001)**

1.1      Movies, movie products and theatre operations  (007001001)

1.2      Amusement and recreational facilities  (007001002)

1.3      Toys and electronic games  (007001003)

1.4      Sporting goods, hobby equipment and athletics clothes  (007001004)

1.5      Sport facilities (gyms and clubs)  (007001005)

1.6      TVs, radio, stereo equipment and consumer electronics  (007001006)

1.7      Music, records, production and instruments  (007001007)

1.8      Other leisure and recreational products and services  (007001008)

**2    Retailing (007002)**

2.1      Drug stores  (007002002)

2.2      Clothing and shoe stores (007002002)

2.3      Discount stores  (007002003)

2.4      Computer stores   (007002004)

2.5      Other retailing   (007002005)

**3    Food and Beverages (007003)**

3.1      Wine and liqours (007003001)

3.2      Health food (007003002)

3.3      Soft drinks and bottling plants (007003003)

3.4      Food supplements/vitamins (007003004)

3.5      General food products (007003005)

3.6      Other food and beverages (007003006)

**4    Consumer Products (007004)**

4.1      Clothing, shoes and accessories (including jewellery) (007004001)

4.2      Health and beauty aids (007004002)

4.3      Home furnishing and housewares (007004003)

4.4      Housewares (007004004)

4.5      Furnishing and Furniture (007004005)

4.6      Garden and horticultural products (007004006)

4.7      Other (007004007)

4.8      Automobile parts (007004008)

4.9      Mobile homes (007004009)

4.10     Other consumer products (007004010)

**5    Consumer Services (007005)**

5.1      Fast food restaurants  (007005001)

5.2      Other restaurants  (007005002)

5.3      Hotels and resorts  (007005003)

5.4      Auto repair shops  (007005004)

5.5      Education and educational products and materials  (007005005)

5.6      Travel agencies and services  (007005006)

5.7      Other consumer services (including photo processing)  (007005007)

**6    Other Consumer Related (not elsewhere classified) (007006)**

## 008 - Industrial Products

**1    Chemicals and Materials (008001)**

1.1    Plastic fabricators (008001001)

1.2    Homogeneous injections/extrusions (008001002)

1.3    Non-homogeneous injections/extrusions  (008001003)

1.4    Fibre-reinforced (plastic) composites  (008001004)

1.5    Other fabricated plastics (008001005)

1.6    Processes for working with plastics  (008001006)

1.7    Coatings and adhesives manufactures  (008001007)

1.8    Membranes and membrane-based products  (008001008)

1.9    Speciality/performance materials: producers and fabricators  (008001009)

1.10    Semiconductor materials (eg silicon wafers) (008001010)

1.11    III/V semiconductor materials (eg gallium arsenide)  (008001011)

1.12    Speciality metals (including processes for working with metals)  (008001012)

1.13    Ceramics  (008001013)

1.14    Lubricants and functional fluids (008001014)

1.15    Other speciality materials  (008001015)

1.16    Commodity chemicals and polymers (008001016)

1.17    Industrial chemicals  (008001017)

1.18    Polymer (plastics) materials  (008001018)

1.19    Speciality/performance chemicals  (008001019)

1.20    Electronic chemicals  (008001020)

1.21    Other speciality chemicals  (008001021)

1.22    Agricultural chemicals  (008001022)

1.23    Other chemicals and materials (not elsewhere classified) (008001023)

**2    Industrial Automation (008002)**

2.1    Energy management (008002001)

2.2    Industrial measurement and sensing equipment (008002002)

2.3    Process control equipment and systems (008002003)

2.4    Robotics (008002004)

2.5    Machine vision software and systems (008002005)

2.6    Numeric and computerised control of machine tools (008002006)

2.7    Other industrial automation (008002007)

**3    Industry Equipment and Machinery (008003)**

3.1    Machine Tools, other metal working equipment (excluding numeric control) (008003001)

3.2    Hoists, cranes and conveyors (008003002)

3.3    Mining machinery (008003003)

3.4    Industrial trucks and tractors (008003004)

3.5    Other industrial process machinery for textile, paper and other industries (008003005)

3.6    Power transmission equipment (including generators and motors) (008003006)

3.7    Other industrial equipment and machinery (008003007

**4    Pollution and Recycling Related (008004)**

4.1    Air filters and air purification and monitoring equipment (008004001)

4.2    Chemical and solid material recycling  (008004002)

4.3    Water treatment equipment and waste disposal systems (008004003)

4.4    Other pollution and recycling related (008004004)

**5    Other Industrial Products (not elsewhere classified) (008005)**

**6    Industrial Services (008006)**

6.1      Process control and logistics (008006001)

## 009 - Other

**1    Transportation (009001)**

1.1      Airlines (009001001)

1.2      Trucking (009001002)

1.3      Leasing of railcars, buses, cars, etc.  (009001003)

1.4      Mail and package shipment  (009001004)

1.5      Motor vehicles, transportation equipment and parts (009001005)

1.6      Airfield and other transportation services  (009001006)

1.7      Other transportation  (009001007)

**2    Finance, Insurance and Real Estate (009002)**

2.1      Insurance related (009002001)

2.2      Real estate  (009002002)

2.3      Banking  (009002003)

2.4      Security and commodity brokers and services  (009002004)

2.5      Investment groups  (009002005)

2.6      Other finance, insurance and real estate (including loan and mortgage companies) (009002006)

**3    Services (009003)**

3.1      Engineering services (009003001)

3.2      Advertising and public relations (009003002)

3.3      Leasing (not elsewhere classified) (009003003)

3.4      Distributors, importers and wholesalers  (009003004)

3.5      Consulting services  (009003005)

3.6      Media related services  (009003006)

3.7      Other services (not elsewhere classified) (009003007)

**4    Manufacturing (009004)**

4.1      Business products and supplies (009004001)

4.2      Office furniture and other professional furnishings (009004002)

4.3      Textiles (synthetic and natural)  (009004003)

4.4      Hardware, plumbing supplies  (009004004)

4.5      Books, cards and other publishing (009004005)

4.6      Packing products and systems (009004006)

4.7      Printing and binding (009004007)

4.8      Other manufacturing (not elsewhere classified) (009004008)

**5    Agriculture, Forestry, Fishing, Animal Husbandry and Related Products (009005)**

**6    Mining (non energy related) (009006)**

**7    Construction and Building Products(009007)**

7.1      Construction (009007001)

7.2      Manufacture of building materials (009007002)

7.3      Manufacture of pre-fabricated buildings and systems (009007003)

7.4      Distribution of building products and systems (009007004)

7.5      Construction services (009007005)

7.6      Other construction and building products related (009007006)

7.7      Engineering and consulting services related to construction (009007007)

7.8      Manufacture of construction materials, components and systems (009007008)

7.9      Construction companies (009007009)

7.10    Facility management companies (009007010)

**8      Utilities and Related Firms(009008)**

8.1      Electric companies (009008001)

8.2      Water, sewerage, chemical and solid waste treatment plants (009008002)

8.3      Gas transmission and distribution (009008003)

8.4      Other utilities and related firms (009008004)

**9      Other (uncategorised) (009009)**

9.1      Conglomerates and holding companies (009009001)

# Appendix B: Technology keywords

The detailed Technology keywords are divided into 11 main sectors (Level 1), 61 sub-sectors (Level 2) and 328 specific branches (Level 3):

1. 001 - Electronics, IT and Telecoms
2. 002 - Industrial manufacturing, material and transport technologies
3. 003 - Other industrial technologies
4. 004 - Energy
5. 005 - Physical and exact sciences
6. 006 - Biological sciences
7. 007 - Agriculture and Marine Resources
8. 008 - Agrofood industry
9. 009 - Measurements and standards
10. 010 - Protecting man and the environment
11. 011 - Social and Economic Concerns

The Technology keywords was updated in Q4 2013. In this version, the obsolete keywords that have been removed from the Merlin database are written in red, while newly added keywords are written in blue, and keywords that have changed level are written in green. You can still use obsolete keywords to search for profiles created before the list was updated, but you will not be able to use them when creating new profiles.

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## 001 - Electronics, IT and Telecoms

**1     Electronics, Microelectronics (001001)**

| | |
|---|---|
| 1.1 | Automation, Robotics Control Systems (001001001) |
| 1.2 | Digital Systems, Digital Representation (001001002) |
| 1.3 | Electronic engineering (001001004) |
| 1.4 | Embedded Systems and Real Time Systems (001001005) |
| 1.5 | High Frequency Technology, Microwaves (001001006) |
| 1.6 | Magnetic and Superconductory Materials/Devices (001001007) |
| 1.7 | Microengineering (001001008) |
| 1.8 | Micromachining (001001009) |
| 1.9 | Nanotechnologies related to electronics & microelectronics (001001010) |
| 1.10 | Optical Networks and Systems (001001011) |
| 1.11 | Peripherals Technologies (Mass Data Storage, Display Technologies) related to Electronics and Microelectronics (001001012) |
| 1.12 | Printed Circuits and Integrated Circuits (001001013) |
| 1.13 | Quantum Informatics (001001014) |
| 1.14 | Semiconductors (001001015) |

4.2        E-Learning (001004002)

4.3        E-Publishing, Digital Content (001004003)

4.4        Human Language Technologies (001004004)

4.5        Information Filtering, Semantics, Statistics (001004005)

4.6        Visualisation, Virtual Reality (001004006)


**5        Telecommunications, Networking (001005)**

5.1        Audiovisual Equipment and Communication (001005001)

5.2        Broadband Technologies (001005002)

5.3        Mobile Communications (001005003)

5.4        Narrow Band Technologies (001005004)

5.5        Network Technology, Network Security (001005005)

5.6        Radar (001005006)

5.7        Research Networking, GRID (001005007)

5.8        Satellite Technology/Systems/Positioning/Communication in GPS – Global Positioning System (001005008)

5.9        Signal Processing (001005009)

5.10      Hi-Fi (001005010)

5.11      Description to Sound and Music Computing (001005011)

5.12      Description Image/Video Computing (001005012)

5.13      Communications Protocols, Interoperability (001005013)

5.14      Residential Gateaway (001005014)

5.15      VoIP telephony, remote access (001005015)

**6        Electronic circuits, components and equipment (001006)**

6.1        3D printing (001006001)

6.2        Electronic engineering (001006002)

6.3        Embedded Systems and Real Time Systems (001006003)

6.4        High Frequency Technology, Microwaves (001006004)

6.5        Magnetic and superconductory materials/devices (001006005)

6.6        Nanotechnologies related to electronics & microelectronics (001006006)

6.7        Optical Networks and Systems (001006007)

6.8        Micro and Nanotechnologies related to Electronics and Microelectronics (001006008)

6.9        Peripherals Technologies (Mass Data Storage, Displays) (001006009)

6.10      Printed circuits and integrated circuits (001006010)

6.11      Quantum Informatics (001006011)

6.12      Semiconductors (001006012)

6.13      Smart cards and access systems (001006013)


## 002 - Industrial manufacturing, material and transport technologies

**1        Design and Modelling/Prototypes (002001)**

1.1        3D printing (002001001)

**2        Industrial Manufacture (002002)**

2.1        Cleaning (sandblasting, brushing) (002002001)

2.2        Coatings (002002002)

2.3        Drying (002002003)

2.4        Erosion, Removal (spark erosion, flame cutting, laser/plasma cutting, electrochemical erosion, waterjet cutting) (002002004)

2.5        Forming (rolling, forging, pressing, drawing) (002002005)

2.6 Hardening, heat treatment (002002006)

2.7 Joining techniques (riveting, screw driving, gluing) (002002007)

2.8 Jointing (soldering, welding, sticking) (002002008)

2.9 Machine Tools (002002009)

2.10 Machining (turning, drilling, moulding, milling, planning, cutting) (002002010)

2.11 Machining, fine (grinding, lapping) (002002011)

2.12 Mixing (powder, etc.), separation (sorting, filtering) (002002012)

2.13 Moulding, injection moulding, extrusion, sintering (002002013)

2.14 Surface treatment (painting, galvano, polishing, CVD, PVD) (002002014)

2.15 Extrusion (002002015)

2.16 Microassembly, nanoassembly (002002016)

2.17 Microengineering and nanoengineering (002002017)

2.18 Micropostioning, nanopositioning (002002018)

2.19 Micromachining, nanomachining (002002019)

2.20 Moulding, injection moulding, sintering (002002020)

3 **Process control and logistics (002003)**

3.1 Component integration (002003001)

3.2 Information processing & Systems, Workflow (002003002)

3.3 Manufacturing plants networks (002003003)

3.1 Process automation (002003004)

3.2 Prototypes, trials and pilot schemes (002003005)

3.3 Supply chain (002003006)

4 **Plant Design and Maintenance (002004)**

5 **Packaging/Handling (002005)**

5.1 Foil, fils (002005001)

5.2 Laminate (002005002)

5.3 Packaging for machines (002005003)

5.4 Packaging for materials (002005004)

5.5 Plastic bags (002005005)

6 **Construction Technology (002006)**

6.1 Building Materials, Components and Methods (002006001)

6.2 Civil engineering (002006002)

6.3 Construction Equipment (002006003)

6.4 Fire Resistance/Safety (002006004)

6.5 Mechanical Engineering, Hydraulics, Vibration and Acoustic Engineering related to construction technology (002006005)

6.6 Pipeline Technology (002006006)

6.7 Pulp Technology related to construction technology (002006007)

6.8 Sensory/Multisensory Technology, Instrumentation related to construction technology (002006008)

6.9 Simulation, Simulation Engineering (002006009)

6.10 Sound Insulation (002006010)

6.11 Vacuum/High Vacuum Technology (002006011)

6.12 Gas Safety (002006012)

6.13 Security (002006013)

6.14 Construction engineering (design, simulation) (002006014)

6.15 Management of construction process & life (002006015)

6.16 Materials, components and systems for construction (002006016)

6.17 Construction maintenance and monitoring methods & equipment (002006017)

6.18 Construction methods and equipment (002006018)

## 003 - Other industrial technologies

5.2  Dry filling related to Textiles Technology (003005002)

5.3  Dyeing related to Textiles Technology (003005003)

5.4  Finisher related to Textiles Technology (003005004)

5.5  Non weaving related to Textiles Technology (003005005)

5.6  Solvent based glues for strengthening of edges and seam (003005006)

5.7  Thermoplastic textile fibres (003005007)

5.8  Weaving related to Textiles Technology (003005008)

5.9  Woven technical textiles for industrial applications (003005009)

5.10  Textile fibres (003005010)

**6 Footwear/Leather Technology (003006)**

6.1  Dry filling related to Footwear/Leather Technology (003006001)

6.2  Dyes related to Footwear/Leather Technology (003006002)

6.3  Tanned leather process related to Footwear/Leather Technology (003006003)

**7 Sound Engineering/Technology (003007)**

**8 Mining Technologies (003008)**

**9 Printing (003009)**

9.1  Flexography (003009001)

9.2  Printed Reel Material (003009002)

**10 Household Goods & Appliances (003010)**

## 004 - Energy

**1 Energy storage and transport (004001)**

1.1  Heat storage (004001001)

1.2  Heat transport and supply, district heating (004001002)

1.3  Storage of electricity, batteries (004001003)

1.4  Transmission of electricity (004001004)

1.5  Transport and storage of gas and liquid fuels (004001005)

1.6  Transport and storage of hydrogen (004001006)

1.7  Power to gas technology (004001007)

**2 Energy production, transmission and conversion (004002)**

2.1  Fuel cell, hydrogen production (004002001)

2.2  Fuel liquefaction, gasification (004002002)

2.3  Furnace technology, construction of heating boilers (004002003)

2.4  Generators, electric engines and power converters (004002004)

2.5  Heat exchangers (004002005)

2.6  Heat pump, cooling technologies (004002006)

2.7  Heating, ventilation (004002007)

2.8  Turbines, fluid machinery, reciprocating engines, combined heat and power (004002008)

2.9  Combined heat and power (CHP) engines (004002009)

2.10  Other energy related machinery (004002010)

2.11  Turbines (004002011)

2.12  Hydrogen production (004002012)

2.13  Micro-generation and grid connection (004002013)

2.14  Heat pump (004002014)

2.15  Smart grids (004002015)

2.16  Furnace and boiler technologies (004002016)

2.17  Compression and liquefaction of gases (004002017)

2.18  Cooling technologies (004002018)

## 005 - Physical and exact sciences

2.2        Computational Chemistry and Modelling (005002002)

2.3        Inorganic Chemistry (005002003)

2.4        Organic Chemistry (005002004)

2.5        Petrochemistry, Petroleum Engineering (005002005)

**3        Earth Sciences (005003)**

3.1        Geology, Geological Engineering, Geotechnics (005003001)

3.2        Oceanography (005003001)

3.3        Tectonics, Seismology (005003001)

**4        Mathematics, Statistics (005004)**

4.1        Algorithms and Complexity (005004001)

4.2        Mathematical modelling (005004002)

4.3        Statistical Analysis (005004003)

**5        Meteorology/Climatology (005005)**

5.1        Biosensor (005005001)

5.2        Moisture sensors (005005002)

5.3        Temperature monitoring (005005003)

**6        Physics (005006)**

6.1        Acoustics (005006001)

6.2        Astrophysics/Cosmology (005006002)

6.3        Laser Technology (005006003)

6.4        Nuclear Physics (005006004)

6.5        Physics of Fluids (005006005)

6.6        Sensors/Multisensor Technology, Instrumentation (005006006)

6.7        Solid state physics (005006007)

6.8        Thermodynamics (005006008)

6.9        Vibration and Acoustic engineering (005006009)

6.10       Optics (005006010)

6.11       Vacuum (005006011)

**7        Mechanical Engineering (005007)**

7.1        Micro-Mechanics (005007001)

**8        Hydraulics (005008)**

**9        Separation Technologies (005009)**

9.1        Filtration and Membrane Processes (005009001)

9.2        Extraction (005009002)

9.3        Adsorption (005009003)

9.4        Distillation (005009004)

9.5        Sublimation (005009005)

9.6        Other Processes (005009006)

**10       Micro- and Nanotechnology related to physical and exact sciences (005010)**

**11       Micro- and Nanotechnology (005011)**


## 006 - Biological sciences

**1        Medicine, Human Health (006001)**

1.1        Biostatistics, Epidemiology (006001001)

1.2        Care and Health Services (006001002)

1.3        Clinical Research, Trials (006001003)

1.4        Cytology, Cancerology, Oncology (006001004)

1.5        Dentistry/Odontology, Stomatology (006001005)

## 007 - Agriculture and Marine Resources

## 008 - Agrofood industry

2.3      Safe production methods (008002003)

2.4      Traceability of food (008002004)

**3     Nutrition and Health (008003)**

**4     Micro- and Nanotechnology related to agrofood (008004)**

## 009 - Measurements and standards

**1     Measurement Tools (009001)**

1.1      Acoustic Technology related to measurements (009001001)

1.2      Analyses/Test Facilities and Methods (009001002)

1.3      Chemical material testing (009001003)

1.4      Electrical Technology related to measurements (009001004)

1.5      Mechanical Technology related to measurements (009001005)

1.6      Optical material testing (009001006)

1.7      Optical Technology related to measurements (009001007)

1.8      Other Non Destructive Testing (009001008)

1.9      Sensor Technology related to measurements (009001009)

1.10    Thermal material testing (009001010)

**2     Amplifier, A/D Transducer (009002)**

**3     Electronic measurement systems (009003)**

**4     Recording Devices (009004)**

**5     Reference Materials (009005)**

**6     Standards (009006)**

6.1      Quality Standards (009006001)

6.2      Technical Standards (009006002)

## 010 - Protecting man and the environment

**1     Safety (010001)**

1.1      Acoustic safety (010001001)

1.2      Assessment of Risk (010001002)

1.3      Fire Safety Technology (010001003)

1.4      Hazardous Materials (010001004)

1.5      Radiation Protection (010001005)

1.6      Protection against intoxication (010001006)

1.7      Assessment of Environmental Risk and Impact (010001007)

**2     Environment (010002)**

2.1      Air Pollution/Treatment (010002001)

2.2      Biodiversity (010002002)

2.3      Ecology (010002003)

2.4      Environmental Engineering/Technology (010002004)

2.5      Measurement and Detection of Pollution (010002005)

2.6      Natural Disasters (010002006)

2.7      Remote sensing technology (010002007)

2.8      Soil Pollution (010002008)

2.9      Water Pollution/Treatment (010002009)

2.10    Biodiversity / Natural Heritage (010002010)

2.11    Noise Pollution (010002011)

2.12    Capture and Storage of $CO_2$ (010002012)

## 011 - Social and Economic Concerns

1   **Socio-economic development models, economic aspects (011001)**

2   **Education and Training (011002)**

3   **Information and media, society (011003)**

4   **Technology, Society and Employment (011004)**

5   **Infrastructures for social sciences and humanities (011005)**

6   **Citizens participation (011006)**

7   **Foresight tools (011007)**

8   **Sports and Leisure (011008)**

9   **Creative services (011009)**

10  **Creative products (011010)**

# Appendix C: NACE keywords

The NACE keywords are structured into 21 main sectors listed alphabetically (A-U), which is broken down further by 88 sub-sectors and 270 levels showing a total of 996 NACE keywords. These codes are the European industry standard and as such maybe subject to review and update. The list below is correct as of December 2012.

A - Agriculture, Forestry and Fishing
B - Mining and Quarrying
C - Manufacturing
D - Electricity, Gas, Steam and Air Conditioning Supply
E - Water Supply; Sewerage, Waste Management and Remediation Activities
F - Construction
G - Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles
H - Transportation and Storage
I - Accommodation and Food Service Activities
J - Information and Communication
K - Financial and Insurance Activities
L - Real Estate Activities
M - Professional, Scientific and Technical Activities
N - Administrative and Support Service Activities
O - Public Administration and Defence; Compulsory Social Security
P - Education
Q - Human Health and Social Work Activities
R - Arts, Entertainment and Recreation
S - Other Service Activities
T - Activities of Households as Employers; Undifferentiated Goods- and Services-Producing Activities of Households for Own Use
U - Activities of Extraterritorial Organisations and Bodies

**Note:** When creating a new profile for a client in Merlin, you must use Level 3 keywords in order to provide as much information as possible about the profile.

## A - Agriculture, Forestry and Fishing

**A. 01 Crop and animal production, hunting and related service activities**

    A. 01.1 Growing of non-perennial crops

        A. 01.1.1 Growing of cereals (except rice), leguminous crops and oil seeds

        A. 01.1.2 Growing of rice

        A. 01.1.3 Growing of vegetables and melons, roots and tubers

        A. 01.1.4 Growing of sugar cane

        A. 01.1.5 Growing of tobacco

        A. 01.1.6 Growing of fibre crops

        A. 01.1.9 Growing of other non-perennial crops

    A. 01.2 Growing of perennial crops

A. 01.2.1 Growing of grapes

A. 01.2.2 Growing of tropical and subtropical fruits

A. 01.2.3 Growing of citrus fruits

A. 01.2.4 Growing of pome fruits and stone fruits

A. 01.2.5 Growing of other tree and bush fruits and nuts

A. 01.2.6 Growing of oleaginous fruits

A. 01.2.7 Growing of beverage crops

A. 01.2.8 Growing of spices, aromatic, drug and pharmaceutical crops

A. 01.2.9 Growing of other perennial crops

A. 01.3 Plant propagation

A. 01.3.0 Plant propagation

A. 01.4 Animal production

A. 01.4.1 Raising of dairy cattle

A. 01.4.2 Raising of other cattle and buffaloes

A. 01.4.3 Raising of horses and other equines

A. 01.4.4 Raising of camels and camelids

A. 01.4.5 Raising of sheep and goats

A. 01.4.6 Raising of swine/pigs

A. 01.4.7 Raising of poultry

A. 01.4.9 Raising of other animals

A. 01.5 Mixed farming

A. 01.5.0 Mixed farming

A. 01.6 Support activities to agriculture and post-harvest crop activities

A. 01.6.1 Support activities for crop production

A. 01.6.2 Support activities for animal production

A. 01.6.3 Post-harvest crop activities

A. 01.6.4 Seed processing for propagation

A. 01.7 Hunting, trapping and related service activities

A. 01.7.0 Hunting, trapping and related service activities

## A 02 Forestry and logging

A. 02.1 Silviculture and other forestry activities

A. 02.1.0 Silviculture and other forestry activities

A. 02.2 Logging

A. 02.2.0 Logging

A. 02.3 Gathering of wild growing non-wood products

A 02.3.0 Gathering of wild growing non-wood products

A. 02.4 Support services to forestry

A 02.4.0 Support services to forestry

## A 03 Fishing and aquaculture

A. 03.1 Fishing

A. 03.1.1 Marine fishing

A. 03.1.2 Freshwater fishing

A. 03.2 Aquaculture

A. 03.2.1 Marine aquaculture

A. 03.2.2 Freshwater aquaculture

# B - Mining and Quarrying

## B 05 Mining of coal and lignite

B. 05.1 Mining of hard coal

B. 05.1.0 Mining of hard coal

B. 05.2 Mining of lignite

B. 05.2.0 Mining of lignite

## B 06 Extraction of crude petroleum and natural gas

B. 06.1 Extraction of crude petroleum

B. 06.1.0 Extraction of crude petroleum

B. 06.2 Extraction of natural gas

B. 06.2.0 Extraction of natural gas

## B 07 Mining of metal ores

B. 07.1 Mining of iron ores

B. 07.1.0 Mining of iron ores

B. 07.2 Mining of non-ferrous metal ores

B. 07.2.1 Mining of uranium and thorium ores

B. 07.2.9 Mining of other non-ferrous metal ores

## B 08 Other mining and quarrying

B. 08.1 Quarrying of stone, sand and clay

B. 08.1.1 Quarrying of ornamental and building stone, limestone, gypsum, chalk and slate

B. 08.1.2 Operation of gravel and sand pits; mining of clays and kaolin

B. 08.9 Mining and quarrying n.e.c.

B. 08.9.1 Mining of chemical and fertiliser minerals

B. 08.9.2 Extraction of peat

B. 08.9.3 Extraction of salt

B. 08.9.9 Other mining and quarrying n.e.c.

## B 09 Mining support service activities

B. 09.1 Support activities for petroleum and natural gas extraction

B. 09.1.0 Support activities for petroleum and natural gas extraction

B. 09.9 Support activities for other mining and quarrying

B. 09.9.0 Support activities for other mining and quarrying

# C - Manufacturing

## C 10 Manufacture of food products

C. 10.1 Processing and preserving of meat and production of meat products

C. 10.1.1 Processing and preserving of meat

C. 10.1.2 Processing and preserving of poultry meat

C. 10.1.3 Production of meat and poultry meat products

C. 10.2 Processing and preserving of fish, crustaceans and molluscs

C. 10.2.0 Processing and preserving of fish, crustaceans and molluscs

C. 10.3 Processing and preserving of fruit and vegetables

    C. 10.3.1 Processing and preserving of potatoes

    C. 10.3.2 Manufacture of fruit and vegetable juice

    C. 10.3.9 Other processing and preserving of fruit and vegetables

C. 10.4 Manufacture of vegetable and animal oils and fats

    C. 10.4.1 Manufacture of oils and fats

    C. 10.4.2 Manufacture of margarine and similar edible fats

C. 10.5 Manufacture of dairy products

    C. 10.5.1 Operation of dairies and cheese making

    C. 10.5.2 Manufacture of ice cream

C. 10.6 Manufacture of grain mill products, starches and starch products

    C. 10.6.1 Manufacture of grain mill products

    C. 10.6.2 Manufacture of starches and starch products

C. 10.7 Manufacture of bakery and farinaceous products

    C. 10.7.1 Manufacture of bread; manufacture of fresh pastry goods and cakes

    C. 10.7.2 Manufacture of rusks and biscuits; manufacture of preserved pastry goods and cakes

    C. 10.7.3 Manufacture of macaroni, noodles, couscous and similar farinaceous products

C. 10.8 Manufacture of other food products

    C. 10.8.1 Manufacture of sugar

    C. 10.8.2 Manufacture of cocoa, chocolate and sugar confectionery

    C. 10.8.3 Processing of tea and coffee

    C. 10.8.4 Manufacture of condiments and seasonings

    C. 10.8.5 Manufacture of prepared meals and dishes

    C. 10.8.6 Manufacture of homogenised food preparations and dietetic food

    C. 10.8.9 Manufacture of other food products n.e.c.

C. 10.9 Manufacture of prepared animal feeds

    C. 10.9.1 Manufacture of prepared feeds for farm animals

    C. 10.9.2 Manufacture of prepared pet foods

## C 11 Manufacture of beverages

C. 11.0 Manufacture of beverages

    C. 11.0.1 Distilling, rectifying and blending of spirits

    C. 11.0.2 Manufacture of wine from grape

    C. 11.0.3 Manufacture of cider and other fruit wines

    C. 11.0.4 Manufacture of other non-distilled fermented beverages

    C. 11.0.5 Manufacture of beer

    C. 11.0.6 Manufacture of malt

    C. 11.0.7 Manufacture of soft drinks; production of mineral waters and other bottled waters

## C 12 Manufacture of tobacco products

C. 12.0 Manufacture of tobacco products

    C. 12.0.0 Manufacture of tobacco products

## C 13 Manufacture of textiles

C. 13.1 Preparation and spinning of textile fibres

    C. 13.1.0 Preparation and spinning of textile fibres

C. 13.2 Weaving of textiles

C. 13.2.0 Weaving of textiles

C. 13.3 Finishing of textiles

C. 13.3.0 Finishing of textiles

C. 13.9 Manufacture of other textiles

C. 13.9.1 Manufacture of knitted and crocheted fabrics

C. 13.9.2 Manufacture of made-up textile articles, except apparel

C. 13.9.3 Manufacture of carpets and rugs

C. 13.9.4 Manufacture of cordage, rope, twine and netting

C. 13.9.5 Manufacture of non-wovens and articles made from non-wovens, except apparel

C. 13.9.6 Manufacture of other technical and industrial textiles

C. 13.9.9 Manufacture of other textiles n.e.c.

## C 14 Manufacture of wearing apparel

C. 14.1 Manufacture of wearing apparel, except fur apparel

C. 14.1.1  Manufacture of leather clothes

C. 14.1.2 Manufacture of workwear

C. 14.1.3 Manufacture of other outerwear

C. 14.1.4 Manufacture of underwear

C. 14.1.9 Manufacture of other wearing apparel and accessories

C. 14.2 Manufacture of articles of fur

C. 14.2.0 Manufacture of articles of fur

C. 14.3 Manufacture of knitted and crocheted apparel

C. 14.3.1 Manufacture of knitted and crocheted hosiery

C. 14.3.9 Manufacture of other knitted and crocheted apparel

## C 15 Manufacture of leather and related products

C. 15.1 Tanning and dressing of leather; manufacture of luggage, handbags, saddlery and harness; dressing and dyeing of fur

C. 15.1.1 Tanning and dressing of leather; dressing and dyeing of fur

C. 15.1.2 Manufacture of luggage, handbags and the like, saddlery and harness

C. 15.2 Manufacture of footwear

C. 15.2.0 Manufacture of footwear

## C 16 Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials

C. 16.1 Sawmilling and planing of wood

C. 16.1.0  Sawmilling and planing of wood

C. 16.2  Manufacture of products of wood, cork, straw and plaiting materials

C. 16.2.1 Manufacture of veneer sheets and wood-based panels

C. 16.2.2 Manufacture of assembled parquet floors

C. 16.2.3 Manufacture of other builders' carpentry and joinery

C. 16.2.4 Manufacture of wooden containers

C. 16.2.9 Manufacture of other products of wood; manufacture of articles of cork, straw and plaiting materials

## C 17 Manufacture of paper and paper products

C. 17.1 Manufacture of pulp, paper and paperboard

C. 17.1.1 Manufacture of pulp

C. 17.1.2 Manufacture of paper and paperboard

C. 17.2 Manufacture of articles of paper and paperboard

    C. 17.2.1 Manufacture of corrugated paper and paperboard and of containers of paper and paperboard

    C. 17.2.2 Manufacture of household and sanitary goods and of toilet requisites

    C. 17.2.3 Manufacture of paper stationery

    C. 17.2.4 Manufacture of wallpaper

    C. 17.2.9 Manufacture of other articles of paper and paperboard

## C 18 Printing and reproduction of recorded media

C. 18.1 Printing and service activities related to printing

    C. 18.1.1 Printing of newspapers

    C. 18.1.2 Other printing

    C. 18.1.3 Pre-press and pre-media services

    C. 18.1.4 Binding and related services

C. 18.2 Reproduction of recorded media

    C. 18.2.0 Reproduction of recorded media

## C 19 Manufacture of coke and refined petroleum products

C. 19.1 Manufacture of coke oven products

    C. 19.1.0 Manufacture of coke oven products

C. 19.2 Manufacture of refined petroleum products

    C. 19.2.0 Manufacture of refined petroleum products

## C 20 Manufacture of chemicals and chemical products

C. 20.1 Manufacture of basic chemicals, fertilisers and nitrogen compounds, plastics and synthetic rubber in primary forms

    C. 20.1.1 Manufacture of industrial gases

    C. 20.1.2 Manufacture of dyes and pigments

    C. 20.1.3 Manufacture of other inorganic basic chemicals

    C. 20.1.4 Manufacture of other organic basic chemicals

    C. 20.1.5 Manufacture of fertilisers and nitrogen compounds

    C. 20.1.6 Manufacture of plastics in primary forms

    C. 20.1.7 Manufacture of synthetic rubber in primary forms

C. 20.2 Manufacture of pesticides and other agrochemical products

    C. 20.2.0 Manufacture of pesticides and other agrochemical products

C. 20.3 Manufacture of paints, varnishes and similar coatings, printing ink and mastics

    C. 20.3.0 Manufacture of paints, varnishes and similar coatings, printing ink and mastics

C. 20.4 Manufacture of soap and detergents, cleaning and polishing preparations, perfumes and toilet preparations

    C. 20.4.1 Manufacture of soap and detergents, cleaning and polishing preparations

    C. 20.4.2 Manufacture of perfumes and toilet preparations

C. 20.5 Manufacture of other chemical products

    C. 20.5.1 Manufacture of explosives

    C. 20.5.2 Manufacture of glues

    C. 20.5.3 Manufacture of essential oils

    C. 20.5.9 Manufacture of other chemical products n.e.c.

C. 20.6 Manufacture of man-made fibres

    C. 20.6.0 Manufacture of man-made fibres

## C 21 Manufacture of basic pharmaceutical products and pharmaceutical preparations

C. 21.1 Manufacture of basic pharmaceutical products

C. 21.1.0 Manufacture of basic pharmaceutical products

C. 21.2 Manufacture of pharmaceutical preparations

C. 21.2.0 Manufacture of pharmaceutical preparations

**C 22 Manufacture of rubber and plastic products**

C. 22.1 Manufacture of rubber products

C. 22.1.1 Manufacture of rubber tyres and tubes; retreading and rebuilding of rubber tyres

C. 22.1.9 Manufacture of other rubber products

C. 22.2 Manufacture of plastics products

C. 22.2.1 Manufacture of plastic plates, sheets, tubes and profiles

C. 22.2.2 Manufacture of plastic packing goods

C. 22.2.3 Manufacture of builders' ware of plastic

C. 22.2.9 Manufacture of other plastic products

**C 23 Manufacture of other non-metallic mineral products**

C. 23.1 Manufacture of glass and glass products

C. 23.1.1 Manufacture of flat glass

C. 23.1.2 Shaping and processing of flat glass

C. 23.1.3 Manufacture of hollow glass

C. 23.1.4 Manufacture of glass fibres

C. 23.1.9 Manufacture and processing of other glass, including technical glassware

C. 23.2 Manufacture of refractory products

C. 23.2.0 Manufacture of refractory products

C. 23.3 Manufacture of clay building materials

C. 23.3.1 Manufacture of ceramic tiles and flags

C. 23.3.2 Manufacture of bricks, tiles and construction products, in baked clay

C. 23.4 Manufacture of other porcelain and ceramic products

C. 23.4.1 Manufacture of ceramic household and ornamental articles

C. 23.4.2 Manufacture of ceramic sanitary fixtures

C. 23.4.3 Manufacture of ceramic insulators and insulating fittings

C. 23.4.4 Manufacture of other technical ceramic products

C. 23.4.9 Manufacture of other ceramic products

C. 23.5 Manufacture of cement, lime and plaster

C. 23.5.1 Manufacture of cement

C. 23.5.2 Manufacture of lime and plaster

C. 23.6 Manufacture of articles of concrete, cement and plaster

C. 23.6.1 Manufacture of concrete products for construction purposes

C. 23.6.2 Manufacture of plaster products for construction purposes

C. 23.6.3 Manufacture of ready-mixed concrete

C. 23.6.4 Manufacture of mortars

C. 23.6.5 Manufacture of fibre cement

C. 23.6.9 Manufacture of other articles of concrete, plaster and cement

C. 23.7 Cutting, shaping and finishing of stone

C. 23.7.0 Cutting, shaping and finishing of stone

C. 23.9 Manufacture of abrasive products and non-metallic mineral products n.e.c.

C. 23.9.1 Production of abrasive products

C. 23.9.9 Manufacture of other non-metallic mineral products n.e.c.

## C 24 Manufacture of basic metals

C. 24.1 Manufacture of basic iron and steel and of ferro-alloys

C. 24.1.0 Manufacture of basic iron and steel and of ferro-alloys

C. 24.2 Manufacture of tubes, pipes, hollow profiles and related fittings, of steel

C. 24.2.0 Manufacture of tubes, pipes, hollow profiles and related fittings, of steel

C. 24.3 Manufacture of other products of first processing of steel

C. 24.3.1 Cold drawing of bars

C. 24.3.2 Cold rolling of narrow strip

C. 24.3.3 Cold forming or folding

C. 24.3.4 Cold drawing of wire

C. 24.4 Manufacture of basic precious and other non-ferrous metals

C. 24.4.1 Precious metals production

C. 24.4.2 Aluminium production

C. 24.4.3 Lead, zinc and tin production

C. 24.4.4 Copper production

C. 24.4.5 Other non-ferrous metal production

C. 24.4.6 Processing of nuclear fuel

C. 24.5 Casting of metals

C. 24.5.1 Casting of iron

C. 24.5.2 Casting of steel

C. 24.5.3 Casting of light metals

C. 24.5.4 Casting of other non-ferrous metals

## C 25 Manufacture of fabricated metal products, except machinery and equipment

C. 25.1 Manufacture of structural metal products

C. 25.1.1 Manufacture of metal structures and parts of structures

C. 25.1.2 Manufacture of doors and windows of metal

C. 25.2 Manufacture of tanks, reservoirs and containers of metal

C. 25.2.1 Manufacture of central heating radiators and boilers

C. 25.2.9 Manufacture of other tanks, reservoirs and containers of metal

C. 25.3 Manufacture of steam generators, except central heating hot water boilers

C. 25.3.0 Manufacture of steam generators, except central heating hot water boilers

C. 25.4 Manufacture of weapons and ammunition

C. 25.4.0 Manufacture of weapons and ammunition

C. 25.5 Forging, pressing, stamping and roll-forming of metal; powder metallurgy

C. 25.5.0 Forging, pressing, stamping and roll-forming of metal; powder metallurgy

C. 25.6 Treatment and coating of metals; machining

C. 25.6.1 Treatment and coating of metals

C. 25.6.2 Machining

C. 25.7 Manufacture of cutlery, tools and general hardware

C. 25.7.1 Manufacture of cutlery

C. 25.7.2 Manufacture of locks and hinges

C. 25.7.3 Manufacture of tools

C. 25.9 Manufacture of other fabricated metal products

    C. 25.9.1 Manufacture of steel drums and similar containers

    C. 25.9.2 Manufacture of light metal packaging

    C. 25.9.3 Manufacture of wire products, chain and springs

    C. 25.9.4 Manufacture of fasteners and screw machine products

    C. 25.9.9 Manufacture of other fabricated metal products n.e.c.

## C 26 Manufacture of computer, electronic and optical products

C. 26.1 Manufacture of electronic components and boards

    C. 26.1.1 Manufacture of electronic components

    C. 26.1.2 Manufacture of loaded electronic boards

C. 26.2 Manufacture of computers and peripheral equipment

    C. 26.2.0 Manufacture of computers and peripheral equipment

C. 26.3 Manufacture of communication equipment

    C. 26.3.0 Manufacture of communication equipment

C. 26.4 Manufacture of consumer electronics

    C. 26.4.0 Manufacture of consumer electronics

C. 26.5 Manufacture of instruments and appliances for measuring, testing and navigation; watches and clocks

    C. 26.5.1 Manufacture of instruments and appliances for measuring, testing and navigation

    C. 26.5.2 Manufacture of watches and clocks

C. 26.6 Manufacture of irradiation, electromedical and electrotherapeutic equipment

    C. 26.6.0 Manufacture of irradiation, electromedical and electrotherapeutic equipment

C. 26.7 Manufacture of optical instruments and photographic equipment

    C. 26.7.0 Manufacture of optical instruments and photographic equipment

C. 26.8 Manufacture of magnetic and optical media

    C. 26.8.0 Manufacture of magnetic and optical media

## C 27 Manufacture of electrical equipment

C. 27.1 Manufacture of electric motors, generators, transformers, electricity distribution and control apparatus

    C. 27.1.1 Manufacture of electric motors, generators and transformers

    C. 27.1.2 Manufacture of electricity distribution and control apparatus

C. 27.2 Manufacture of batteries and accumulators

    C. 27.2.0 Manufacture of batteries and accumulators

C. 27.3 Manufacture of wiring and wiring devices

    C. 27.3.1 Manufacture of fibre optic cables

    C. 27.3.2 Manufacture of other electronic and electric wires and cables

    C. 27.3.3 Manufacture of wiring devices

C. 27.4 Manufacture of electric lighting equipment

    C. 27.4.0 Manufacture of electric lighting equipment

C. 27.5 Manufacture of domestic appliances

    C. 27.5.1 Manufacture of electric domestic appliances

    C. 27.5.2 Manufacture of non-electric domestic appliances

C. 27.9 Manufacture of other electrical equipment

    C. 27.9.0 Manufacture of other electrical equipment

## C 28 Manufacture of machinery and equipment n.e.c.

C. 28.1 Manufacture of general-purpose machinery

C. 28.1.1 Manufacture of engines and turbines, except aircraft, vehicle and cycle engines

C. 28.1.2 Manufacture of fluid power equipment

C. 28.1.3 Manufacture of other pumps and compressors

C. 28.1.4 Manufacture of other taps and valves

C. 28.1.5 Manufacture of bearings, gears, gearing and driving elements

C. 28.2 Manufacture of other general-purpose machinery

C. 28.2.1 Manufacture of ovens, furnaces and furnace burners

C. 28.2.2 Manufacture of lifting and handling equipment

C. 28.2.3 Manufacture of office machinery and equipment (except computers and peripheral equipment)

C. 28.2.4 Manufacture of power-driven hand tools

C. 28.2.5 Manufacture of non-domestic cooling and ventilation equipment

C. 28.2.9 Manufacture of other general-purpose machinery n.e.c.

C. 28.3 Manufacture of agricultural and forestry machinery

C. 28.3.0 Manufacture of agricultural and forestry machinery

C. 28.4 Manufacture of metal forming machinery and machine tools

C. 28.4.1 Manufacture of metal forming machinery

C. 28.4.9 Manufacture of other machine tools

C. 28.9 Manufacture of other special-purpose machinery

C. 28.9.1 Manufacture of machinery for metallurgy

C. 28.9.2 Manufacture of machinery for mining, quarrying and construction

C. 28.9.3 Manufacture of machinery for food, beverage and tobacco processing

C. 28.9.4 Manufacture of machinery for textile, apparel and leather production

C. 28.9.5 Manufacture of machinery for paper and paperboard production

C. 28.9.6 Manufacture of plastics and rubber machinery

C. 28.9.9 Manufacture of other special-purpose machinery n.e.c.

**C 29 Manufacture of motor vehicles, trailers and semi-trailers**

C. 29.1 Manufacture of motor vehicles

C. 29.1.0 Manufacture of motor vehicles

C. 29.2 Manufacture of bodies (coachwork) for motor vehicles; manufacture of trailers and semi-trailers

C. 29.2.0 Manufacture of bodies (coachwork) for motor vehicles; manufacture of trailers and semi-trailers

C. 29.3 Manufacture of parts and accessories for motor vehicles

C. 29.3.1 Manufacture of electrical and electronic equipment for motor vehicles

C. 29.3.2 Manufacture of other parts and accessories for motor vehicles

**C 30 Manufacture of other transport equipment**

C. 30.1 Building of ships and boats

C. 30.1.1 Building of ships and floating structures

C. 30.1.2 Building of pleasure and sporting boats

C. 30.2 Manufacture of railway locomotives and rolling stock

C. 30.2.0 Manufacture of railway locomotives and rolling stock

C. 30.3 Manufacture of air and spacecraft and related machinery

C. 30.3.0 Manufacture of air and spacecraft and related machinery

C. 30.4 Manufacture of military fighting vehicles

C. 30.4.0 Manufacture of military fighting vehicles

C. 30.9 Manufacture of transport equipment n.e.c.

C. 30.9.1 Manufacture of motorcycles

C. 30.9.2 Manufacture of bicycles and invalid carriages

C. 30.9.9 Manufacture of other transport equipment n.e.c.

## C 31 Manufacture of furniture

C. 31.0 Manufacture of furniture

C. 31.0.1 Manufacture of office and shop furniture

C. 31.0.2 Manufacture of kitchen furniture

C. 31.0.3 Manufacture of mattresses

C. 31.0.9 Manufacture of other furniture

## C 32 Other manufacturing

C. 32.1 Manufacture of jewellery, bijouterie and related articles

C. 32.1.1 Striking of coins

C. 32.1.2 Manufacture of jewellery and related articles

C. 32.1.3 Manufacture of imitation jewellery and related articles

C. 32.2 Manufacture of musical instruments

C. 32.2.0 Manufacture of musical instruments

C. 32.3 Manufacture of sports goods

C. 32.3.0 Manufacture of sports goods

C. 32.4 Manufacture of games and toys

C. 32.4.0 Manufacture of games and toys

C. 32.5 Manufacture of medical and dental instruments and supplies

C. 32.5.0 Manufacture of medical and dental instruments and supplies

C. 32.9 Manufacturing n.e.c.

C. 32.9.1 Manufacture of brooms and brushes

C. 32.9.9 Other manufacturing n.e.c.

## C 33 Repair and installation of machinery and equipment

C. 33.1 Repair of fabricated metal products, machinery and equipment

C. 33.1.1 Repair of fabricated metal products

C. 33.1.2 Repair of machinery

C. 33.1.3 Repair of electronic and optical equipment

C. 33.1.4 Repair of electrical equipment

C. 33.1.5 Repair and maintenance of ships and boats

C. 33.1.6 Repair and maintenance of aircraft and spacecraft

C. 33.1.7 Repair and maintenance of other transport equipment

C. 33.1.9 Repair of other equipment

C. 33.2 Installation of industrial machinery and equipment

C. 33.2.0 Installation of industrial machinery and equipment

# D - Electricity, Gas, Steam and Air Conditioning Supply

## D 35 Electricity, gas, steam and air conditioning supply

D. 35.1 Electric power generation, transmission and distribution

D. 35.1.1 Production of electricity

D. 35.1.2 Transmission of electricity

D. 35.1.3 Distribution of electricity

D. 35.1.4 Trade of electricity

D. 35.2 Manufacture of gas; distribution of gaseous fuels through mains

D. 35.2.1 Manufacture of gas

D. 35.2.2 Distribution of gaseous fuels through mains

D. 35.2.3 Trade of gas through mains

D. 35.3 Steam and air conditioning supply

D. 35.3.0 Steam and air conditioning supply

## E - Water Supply; Sewerage, Waste Management and Remediation Activities

### E 36 Water collection, treatment and supply

E. 36.0 Water collection, treatment and supply

E. 36.0.0 Water collection, treatment and supply

### E 37 Sewerage

E. 37.0 Sewerage

E. 37.0.0 Sewerage

### E 38 Waste collection, treatment and disposal activities; materials recovery

E. 38.1 Waste collection

E. 38.1.1 Collection of non-hazardous waste

E. 38.1.2 Collection of hazardous waste

E. 38.2 Waste treatment and disposal

E. 38.2.1 Treatment and disposal of non-hazardous waste

E. 38.2.2 Treatment and disposal of hazardous waste

E. 38.3 Materials recovery

E. 38.3.1 Dismantling of wrecks

E. 38.3.2 Recovery of sorted materials

### E 39 Remediation activities and other waste management services

E. 39.0 Remediation activities and other waste management services

E. 39.0.0 Remediation activities and other waste management services

## F - Construction

### F 41 Construction of buildings

F. 41.1 Development of building projects

F. 41.1.0 Development of building projects

F. 41.2 Construction of residential and non-residential buildings

F. 41.2.0 Construction of residential and non-residential buildings

### F 42 Civil engineering

F. 42.1 Construction of roads and railways

F. 42.1.1 Construction of roads and motorways

F. 42.1.2 Construction of railways and underground railways

F. 42.1.3 Construction of bridges and tunnels

F. 42.2 Construction of utility projects

F. 42.2.1 Construction of utility projects for fluids

F. 42.2.2 Construction of utility projects for electricity and telecommunications

F. 42.9 Construction of other civil engineering projects

F. 42.9.1 Construction of water projects

F. 42.9.9 Construction of other civil engineering projects n.e.c.

**F 43 Specialised construction activities**

F. 43.1 Demolition and site preparation

F. 43.1.1 Demolition

F. 43.1.2 Site preparation

F. 43.1.3 Test drilling and boring

F. 43.2 Electrical, plumbing and other construction installation activities

F. 43.2.1 Electrical installation

F. 43.2.2 Plumbing, heat and air-conditioning installation

F. 43.2.9 Other construction installation

F. 43.3 Building completion and finishing

F. 43.3.1 Plastering

F. 43.3.2 Joinery installation

F. 43.3.3 Floor and wall covering

F. 43.3.4 Painting and glazing

F. 43.3.9 Other building completion and finishing

F. 43.9 Other specialised construction activities

F. 43.9.1 Roofing activities

F. 43.9.9 Other specialised construction activities n.e.c.

## G - Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles

**G 45 Wholesale and retail trade and repair of motor vehicles and motorcycles**

G. 45.1 Sale of motor vehicles

G. 45.1.1 Sale of cars and light motor vehicles

G. 45.1.9 Sale of other motor vehicles

G. 45.2 Maintenance and repair of motor vehicles

G. 45.2.0 Maintenance and repair of motor vehicles

G. 45.3 Sale of motor vehicle parts and accessories

G. 45.3.1 Wholesale trade of motor vehicle parts and accessories

G. 45.3.2 Retail trade of motor vehicle parts and accessories

G. 45.4 Sale, maintenance and repair of motorcycles and related parts and accessories

G. 45.4.0 Sale, maintenance and repair of motorcycles and related parts and accessories

**G 46 Wholesale trade, except of motor vehicles and motorcycles**

G. 46.1 Wholesale on a fee or contract basis

G. 46.1.1 Agents involved in the sale of agricultural raw materials, live animals, textile raw materials and semi-finished goods

G. 46.1.2 Agents involved in the sale of fuels, ores, metals and industrial chemicals

G. 46.1.3 Agents involved in the sale of timber and building materials

G. 46.1.4 Agents involved in the sale of machinery, industrial equipment, ships and aircraft

G. 46.1.5 Agents involved in the sale of furniture, household goods, hardware and ironmongery

G. 46.1.6 Agents involved in the sale of textiles, clothing, fur, footwear and leather goods

G. 46.1.7 Agents involved in the sale of food, beverages and tobacco

G. 46.1.8 Agents specialised in the sale of other particular products

G. 46.1.9 Agents involved in the sale of a variety of goods

G. 46.2 Wholesale of agricultural raw materials and live animals

G. 46.2.1 Wholesale of grain, unmanufactured tobacco, seeds and animal feeds

G. 46.2.2 Wholesale of flowers and plants

G. 46.2.3 Wholesale of live animals

G. 46.2.4 Wholesale of hides, skins and leather

G. 46.3 Wholesale of food, beverages and tobacco

G. 46.3.1 Wholesale of fruit and vegetables

G. 46.3.2 Wholesale of meat and meat products

G. 46.3.3 Wholesale of dairy products, eggs and edible oils and fats

G. 46.3.4 Wholesale of beverages

G. 46.3.5 Wholesale of tobacco products

G. 46.3.6 Wholesale of sugar and chocolate and sugar confectionery

G. 46.3.7 Wholesale of coffee, tea, cocoa and spices

G. 46.3.8 Wholesale of other food, including fish, crustaceans and molluscs

G. 46.3.9 Non-specialised wholesale of food, beverages and tobacco

G. 46.4 Wholesale of household goods

G. 46.4.1 Wholesale of textiles

G. 46.4.2 Wholesale of clothing and footwear

G. 46.4.3 Wholesale of electrical household appliances

G. 46.4.4 Wholesale of china and glassware and cleaning materials

G. 46.4.5 Wholesale of perfume and cosmetics

G. 46.4.6 Wholesale of pharmaceutical goods

G. 46.4.7 Wholesale of furniture, carpets and lighting equipment

G. 46.4.8 Wholesale of watches and jewellery

G. 46.4.9 Wholesale of other household goods

G. 46.5 Wholesale of information and communication equipment

G. 46.5.1 Wholesale of computers, computer peripheral equipment and software

G. 46.5.2 Wholesale of electronic and telecommunications equipment and parts

G. 46.6 Wholesale of other machinery, equipment and supplies

G. 46.6.1 Wholesale of agricultural machinery, equipment and supplies

G. 46.6.2 Wholesale of machine tools

G. 46.6.3 Wholesale of mining, construction and civil engineering machinery

G. 46.6.4 Wholesale of machinery for the textile industry and of sewing and knitting machines

G. 46.6.5 Wholesale of office furniture

G. 46.6.6 Wholesale of other office machinery and equipment

G. 46.6.9 Wholesale of other machinery and equipment

G. 46.7 Other specialised wholesale

G. 46.7.1 Wholesale of solid, liquid and gaseous fuels and related products

G. 46.7.2 Wholesale of metals and metal ores

G. 46.7.3 Wholesale of wood, construction materials and sanitary equipment

G. 46.7.4 Wholesale of hardware, plumbing and heating equipment and supplies

G. 46.7.5 Wholesale of chemical products

G. 46.7.6 Wholesale of other intermediate products

G. 46.7.7 Wholesale of waste and scrap

G. 46.9 Non-specialised wholesale trade

G. 46.9.0 Non-specialised wholesale trade

## G 47 Retail trade, except of motor vehicles and motorcycles

G. 47.1 Retail sale in non-specialised stores

G. 47.1.1 Retail sale in non-specialised stores with food, beverages or tobacco predominating

G. 47.1.9 Other retail sale in non-specialised stores

G. 47.2 Retail sale of food, beverages and tobacco in specialised stores

G. 47.2.1 Retail sale of fruit and vegetables in specialised stores

G. 47.2.2 Retail sale of meat and meat products in specialised stores

G. 47.2.3 Retail sale of fish, crustaceans and molluscs in specialised stores

G. 47.2.4 Retail sale of bread, cakes, flour confectionery and sugar confectionery in specialised stores

G. 47.2.5 Retail sale of beverages in specialised stores

G. 47.2.6 Retail sale of tobacco products in specialised stores

G. 47.2.9 Other retail sale of food in specialised stores

G. 47.3 Retail sale of automotive fuel in specialised stores

G. 47.3.0 Retail sale of automotive fuel in specialised stores

G. 47.4 Retail sale of information and communication equipment in specialised stores

G. 47.4.1 Retail sale of computers, peripheral units and software in specialised stores

G. 47.4.2 Retail sale of telecommunications equipment in specialised stores

G. 47.4.3 Retail sale of audio and video equipment in specialised stores

G. 47.5 Retail sale of other household equipment in specialised stores

G. 47.5.1 Retail sale of textiles in specialised stores

G. 47.5.2 Retail sale of hardware, paints and glass in specialised stores

G. 47.5.3 Retail sale of carpets, rugs, wall and floor coverings in specialised stores

G. 47.5.4 Retail sale of electrical household appliances in specialised stores

G. 47.5.9 Retail sale of furniture, lighting equipment and other household articles in specialised stores

G. 47.6 Retail sale of cultural and recreation goods in specialised stores

G. 47.6.1 Retail sale of books in specialised stores

G. 47.6.2 Retail sale of newspapers and stationery in specialised stores

G. 47.6.3 Retail sale of music and video recordings in specialised stores

G. 47.6.4 Retail sale of sporting equipment in specialised stores

G. 47.6.5 Retail sale of games and toys in specialised stores

G. 47.7 Retail sale of other goods in specialised stores

G. 47.7.1 Retail sale of clothing in specialised stores

G. 47.7.2 Retail sale of footwear and leather goods in specialised stores

G. 47.7.3 Dispensing chemist in specialised stores

G. 47.7.4 Retail sale of medical and orthopaedic goods in specialised stores

G. 47.7.5 Retail sale of cosmetic and toilet articles in specialised stores

G. 47.7.6 Retail sale of flowers, plants, seeds, fertilisers, pet animals and pet food in specialised stores

G. 47.7.7 Retail sale of watches and jewellery in specialised stores

G. 47.7.8 Other retail sale of new goods in specialised stores

G. 47.7.9 Retail sale of second-hand goods in stores

G. 47.8 Retail sale via stalls and markets

G. 47.8.1 Retail sale via stalls and markets of food, beverages and tobacco products

G. 47.8.2 Retail sale via stalls and markets of textiles, clothing and footwear

G. 47.8.9 Retail sale via stalls and markets of other goods

G. 47.9 Retail trade not in stores, stalls or markets

G. 47.9.1 Retail sale via mail order houses or via Internet

G. 47.9.9 Other retail sale not in stores, stalls or markets

# H - Transportation and Storage

## H 49 Land transport and transport via pipelines

H. 49.1 Passenger rail transport, interurban

H. 49.1.0 Passenger rail transport, interurban

H. 49.2 Freight rail transport

H. 49.2.0 Freight rail transport

H. 49.3 Other passenger land transport

H. 49.3.1 Urban and suburban passenger land transport

H. 49.3.2 Taxi operation

H. 49.3.9 Other passenger land transport n.e.c.

H. 49.4 Freight transport by road and removal services

H. 49.4.1 Freight transport by road

H. 49.4.2 Removal services

H 49.5 Transport via pipeline

H 49.50 Transport via pipeline

## H 50 Water transport

H. 50.1 Sea and coastal passenger water transport

H. 50.1.0 Sea and coastal passenger water transport

H. 50.2 Sea and coastal freight water transport

H. 50.2.0 Sea and coastal freight water transport

H. 50.3 Inland passenger water transport

H. 50.3.0 Inland passenger water transport

H. 50.4 Inland freight water transport

H. 50.4.0 Inland freight water transport

## H 51 Air transport

H. 51.1 Passenger air transport

H. 51.1.0 Passenger air transport

H. 51.2 Freight air transport and space transport

H. 51.2.1 Freight air transport

H. 51.2.2 Space transport

## H 52 Warehousing and support activities for transportation

H. 52.1 Warehousing and storage

H. 52.1.0 Warehousing and storage

H. 52.2 Support activities for transportation

H. 52.2.1 Service activities incidental to land transportation

H. 52.2.2 Service activities incidental to water transportation

H. 52.2.3 Service activities incidental to air transportation

H. 52.2.4 Cargo handling

H. 52.2.9 Other transportation support activities

## H 53 Postal and courier activities

H. 53.1 Postal activities under universal service obligation

H. 53.1.0 Postal activities under universal service obligation

H. 53.2 Other postal and courier activities

H. 53.2.0 Other postal and courier activities

# I - Accommodation and Food Service Activities

## I 55 Accommodation

I. 55.1 Hotels and similar accommodation

I. 55.1.0 Hotels and similar accommodation

I. 55.2 Holiday and other short-stay accommodation

I. 55.2.0 Holiday and other short-stay accommodation

I. 55.3 Camping grounds, recreational vehicle parks and trailer parks

I. 55.3.0 Camping grounds, recreational vehicle parks and trailer parks

I. 55.9 Other accommodation

I. 55.9.0 Other accommodation

## I 56 Food and beverage service activities

I 56.1 Restaurants and mobile food service activities

I 56.10 Restaurants and mobile food service activities

I 56.2 Event catering and other food service activities

I 56.21 Event catering activities

I 56.29 Other food service activities

I 56.3 Beverage serving activities

I 56.30 Beverage serving activities

# J - Information and Communication

## J 58 Publishing activities

J. 58.1 Publishing of books, periodicals and other publishing activities

J. 58.1.1 Book publishing

J. 58.1.2 Publishing of directories and mailing lists

J. 58.1.3 Publishing of newspapers

J. 58.1.4 Publishing of journals and periodicals

J. 58.1.9 Other publishing activities

J. 58.2 Software publishing

J. 58.2.1 Publishing of computer games

J. 58.2.9 Other software publishing

## J 59 Motion picture, video and television programme production, sound recording and music publishing activities

J. 59.1 Motion picture, video and television programme activities

J. 59.1.1 Motion picture, video and television programme production activities

J. 59.1.2 Motion picture, video and television programme post-production activities

J. 59.1.3 Motion picture, video and television programme distribution activities

J. 59.1.4 Motion picture projection activities

J. 59.2 Sound recording and music publishing activities

J. 59.2.0 Sound recording and music publishing activities

**J 60 Programming and broadcasting activities**

J. 60.1 Radio broadcasting

J. 60.1.0 Radio broadcasting

J. 60.2 Television programming and broadcasting activities

J. 60.2.0 Television programming and broadcasting activities

**J 61 Telecommunications**

J. 61.1 Wired telecommunications activities

J. 61.1.0 Wired telecommunications activities

J. 61.2 Wireless telecommunications activities

J. 61.2.0 Wireless telecommunications activities

J. 61.3 Satellite telecommunications activities

J. 61.3.0 Satellite telecommunications activities

J. 61.9 Other telecommunications activities

J. 61.9.0 Other telecommunications activities

**J 62 Computer programming, consultancy and related activities**

J. 62.0 Computer programming, consultancy and related activities

J. 62.0.1 Computer programming activities

J. 62.0.2 Computer consultancy activities

J. 62.0.3 Computer facilities management activities

J. 62.0.9 Other information technology and computer service activities

**J 63 Information service activities**

J. 63.1 Data processing, hosting and related activities; web portals

J. 63.1.1 Data processing, hosting and related activities

J. 63.1.2 Web portals

J. 63.9 Other information service activities

J. 63.9.1 News agency activities

J. 63.9.9 Other information service activities n.e.c.

## K - Financial and Insurance Activities

**K 64 Financial service activities, except insurance and pension funding**

K. 64.1 Monetary intermediation

K. 64.1.1 Central banking

K. 64.1.9 Other monetary intermediation

K. 64.2 Activities of holding companies

K. 64.2.0 Activities of holding companies

K. 64.3 Trusts, funds and similar financial entities

K. 64.3.0 Trusts, funds and similar financial entities

K. 64.9 Other financial service activities, except insurance and pension funding

K. 64.9.1 Financial leasing

K. 64.9.2 Other credit granting

K. 64.9.9 Other financial service activities, except insurance and pension funding n.e.c.

**K 65 Insurance, reinsurance and pension funding, except compulsory social security**

K. 65.1 Insurance

K. 65.1.1 Life insurance

K. 65.1.2 Non-life insurance

K. 65.2 Reinsurance

K. 65.2.0 Reinsurance

K. 65.3 Pension funding

K. 65.3.0 Pension funding

**K 66 Activities auxiliary to financial services and insurance activities**

K. 66.1 Activities auxiliary to financial services, except insurance and pension funding

K. 66.1.1 Administration of financial markets

K. 66.1.2 Security and commodity contracts brokerage

K. 66.1.9 Other activities auxiliary to financial services, except insurance and pension funding

K. 66.2 Activities auxiliary to insurance and pension funding

K. 66.2.1 Risk and damage evaluation

K. 66.2.2 Activities of insurance agents and brokers

K. 66.2.9 Other activities auxiliary to insurance and pension funding

K. 66.3 Fund management activities

K. 66.3.0 Fund management activities

## L - Real Estate Activities

**L 68 Real estate activities**

L. 68.1 Buying and selling of own real estate

L. 68.1.0 Buying and selling of own real estate

L. 68.2 Renting and operating of own or leased real estate

L. 68.2.0 Renting and operating of own or leased real estate

L. 68.3 Real estate activities on a fee or contract basis

L. 68.3.1 Real estate agencies

L. 68.3.2 Management of real estate on a fee or contract basis

## M - Professional, Scientific and Technical Activities

**M 69 Legal and accounting activities**

M. 69.1 Legal activities

M. 69.1.0 Legal activities

M. 69.2 Accounting, bookkeeping and auditing activities; tax consultancy

M. 69.2.0 Accounting, bookkeeping and auditing activities; tax consultancy

**M 70 Activities of head offices; management consultancy activities**

M. 70.1 Activities of head offices

M. 70.1.0 Activities of head offices

M. 70.2 Management consultancy activities

M. 70.2.1 Public relations and communication activities

M. 70.2.2 Business and other management consultancy activities

## M 71 Architectural and engineering activities; technical testing and analysis

M. 71.1 Architectural and engineering activities and related technical consultancy

M. 71.1.1 Architectural activities

M. 71.1.2 Engineering activities and related technical consultancy

M. 71.2 Technical testing and analysis

M. 71.2.0 Technical testing and analysis

## M 72 Scientific research and development

M. 72.1 Research and experimental development on natural sciences and engineering

M. 72.1.1 Research and experimental development on biotechnology

M. 72.1.9 Other research and experimental development on natural sciences and engineering

M. 72.2 Research and experimental development on social sciences and humanities

M. 72.2.0 Research and experimental development on social sciences and humanities

## M 73 Advertising and market research

M. 73.1 Advertising

M. 73.1.1 Advertising agencies

M. 73.1.2 Media representation

M. 73.2 Market research and public opinion polling

M. 73.2.0 Market research and public opinion polling

## M 74 Other professional, scientific and technical activities

M. 74.1 Specialised design activities

M. 74.1.0 Specialised design activities

M. 74.2 Photographic activities

M. 74.2.0 Photographic activities

M. 74.3 Translation and interpretation activities

M. 74.3.0 Translation and interpretation activities

M. 74.9 Other professional, scientific and technical activities n.e.c.

M. 74.9.0 Other professional, scientific and technical activities n.e.c.

## M 75 Veterinary activities

M. 75.0 Veterinary activities

M. 75.0.0 Veterinary activities

# N - Administrative and Support Service Activities

## N 77 Rental and leasing activities

N. 77.1 Renting and leasing of motor vehicles

N. 77.1.1 Renting and leasing of cars and light motor vehicles

N. 77.1.2 Renting and leasing of trucks

N. 77.2 Renting and leasing of personal and household goods

N. 77.2.1 Renting and leasing of recreational and sports goods

N. 77.2.2 Renting of video tapes and disks

N. 77.2.9 Renting and leasing of other personal and household goods

N. 77.3 Renting and leasing of other machinery, equipment and tangible goods

N. 77.3.1 Renting and leasing of agricultural machinery and equipment

N. 77.3.2 Renting and leasing of construction and civil engineering machinery and equipment

N. 77.3.3 Renting and leasing of office machinery and equipment (including computers)

N. 77.3.4 Renting and leasing of water transport equipment

N. 77.3.5 Renting and leasing of air transport equipment

N. 77.3.9 Renting and leasing of other machinery, equipment and tangible goods n.e.c.

N. 77.4 Leasing of intellectual property and similar products, except copyrighted works

N. 77.4.0 Leasing of intellectual property and similar products, except copyrighted works

## N 78 Employment activities

N. 78.1 Activities of employment placement agencies

N. 78.1.0 Activities of employment placement agencies

N. 78.2 Temporary employment agency activities

N. 78.2.0 Temporary employment agency activities

N. 78.3 Other human resources provision

N. 78.3.0 Other human resources provision

## N 79 Travel agency, tour operator and other reservation service and related activities

N. 79.1 Travel agency and tour operator activities

N. 79.1.1 Travel agency activities

N. 79.1.2 Tour operator activities

N. 79.9 Other reservation service and related activities

N. 79.9.0 Other reservation service and related activities

## N 80 Security and investigation activities

N. 80.1 Private security activities

N. 80.1.0 Private security activities

N. 80.2 Security systems service activities

N. 80.2.0 Security systems service activities

N. 80.3 Investigation activities

N. 80.3.0 Investigation activities

## N 81 Services to buildings and landscape activities

N. 81.1 Combined facilities support activities

N. 81.1.0 Combined facilities support activities

N. 81.2 Cleaning activities

N. 81.2.1 General cleaning of buildings

N. 81.2.2 Other building and industrial cleaning activities

N. 81.2.9 Other cleaning activities

N. 81.3 Landscape service activities

N. 81.3.0 Landscape service activities

## N 82 Office administrative, office support and other business support activities

N. 82.1 Office administrative and support activities

N. 82.1.1 Combined office administrative service activities

N. 82.1.9 Photocopying, document preparation and other specialised office support activities

N. 82.2 Activities of call centres

N. 82.2.0 Activities of call centres

N. 82.3 Organisation of conventions and trade shows

N. 82.3.0 Organisation of conventions and trade shows

N. 82.9 Business support service activities n.e.c.

N. 82.9.1 Activities of collection agencies and credit bureaus

N. 82.9.2 Packaging activities

N. 82.9.9 Other business support service activities n.e.c.

## O - Public Administration and Defence; Compulsory Social Security

**O 84 Public administration and defence; compulsory social security**

O. 84.1 Administration of the State and the economic and social policy of the community

O. 84.1.1 General public administration activities

O. 84.1.2 Regulation of the activities of providing health care, education, cultural services and other social services, excluding social security

O. 84.1.3 Regulation of and contribution to more efficient operation of businesses

O. 84.2 Provision of services to the community as a whole

O. 84.2.1 Foreign affairs

O. 84.2.2 Defence activities

O. 84.2.3 Justice and judicial activities

O. 84.2.4 Public order and safety activities

O. 84.2.5 Fire service activities

O. 84.3 Compulsory social security activities

O. 84.3.0 Compulsory social security activities

## P - Education

**P 85 Education**

P. 85.1 Pre-primary education

P. 85.1.0 Pre-primary education

P. 85.2 Primary education

P. 85.2.0 Primary education

P. 85.3 Secondary education

P. 85.3.1 General secondary education

P. 85.3.2 Technical and vocational secondary education

P. 85.4 Higher education

P. 85.4.1 Post-secondary non-tertiary education

P. 85.4.2 Tertiary education

P. 85.5 Other education

P. 85.5.1 Sports and recreation education

P. 85.5.2 Cultural education

P. 85.5.3 Driving school activities

P. 85.5.9 Other education n.e.c.

P. 85.6 Educational support activities

P. 85.6.0 Educational support activities

# Q - Human Health and Social Work Activities

**Q 86 Human health activities**

Q. 86.1 Hospital activities

Q. 86.1.0 Hospital activities

Q. 86.2 Medical and dental practice activities

Q. 86.2.1 General medical practice activities

Q. 86.2.2 Specialist medical practice activities

Q. 86.2.3 Dental practice activities

Q. 86.9 Other human health activities

Q. 86.9.0 Other human health activities

**Q 87 Residential care activities**

Q. 87.1 Residential nursing care activities

Q. 87.1.0 Residential nursing care activities

Q. 87.2 Residential care activities for mental retardation, mental health and substance abuse

Q. 87.2.0 Residential care activities for mental retardation, mental health and substance abuse

Q. 87.3 Residential care activities for the elderly and disabled

Q. 87.3.0 Residential care activities for the elderly and disabled

Q. 87.9 Other residential care activities

Q. 87.9.0 Other residential care activities

**Q 88 Social work activities without accommodation**

Q. 88.1 Social work activities without accommodation for the elderly and disabled

Q. 88.1.0 Social work activities without accommodation for the elderly and disabled

Q. 88.9 Other social work activities without accommodation

Q. 88.9.1 Child day-care activities

Q. 88.9.9 Other social work activities without accommodation n.e.c.

# R - Arts, Entertainment and Recreation

**R 90 Creative, arts and entertainment activities**

R 90.0 Creative, arts and entertainment activities

R 90.01 Performing arts

R 90.02 Support activities to performing arts

R 90.03 Artistic creation

R 90.04 Operation of arts facilities

**R 91 Libraries, archives, museums and other cultural activities**

R. 91.0 Libraries, archives, museums and other cultural activities

R. 91.0.1 Library and archives activities

R. 91.0.2 Museums activities

R. 91.0.3 Operation of historical sites and buildings and similar visitor attractions

R. 91.0.4 Botanical and zoological gardens and nature reserves activities

**R 92 Gambling and betting activities**

R. 92.0 Gambling and betting activities

R. 92.0.0 Gambling and betting activities

**R 93 Sports activities and amusement and recreation activities**

R. 93.1 Sports activities

R. 93.1.1 Operation of sports facilities

R. 93.1.2 Activities of sport clubs

R. 93.1.3 Fitness facilities

R. 93.1.9 Other sports activities

R. 93.2 Amusement and recreation activities

R. 93.2.1 Activities of amusement parks and theme parks

R. 93.2.9 Other amusement and recreation activities

# S - Other Service Activities

**S 94 Activities of membership organisations**

S. 94.1 Activities of business, employers and professional membership organisations

S. 94.1.1 Activities of business and employers membership organisations

S. 94.1.2 Activities of professional membership organisations

S. 94.2 Activities of trade unions

S. 94.2.0 Activities of trade unions

S. 94.9 Activities of other membership organisations

S. 94.9.1 Activities of religious organisations

S. 94.9.2 Activities of political organisations

S. 94.9.9 Activities of other membership organisations n.e.c.

**S 95 Repair of computers and personal and household goods**

S. 95.1 Repair of computers and communication equipment

S. 95.1.1 Repair of computers and peripheral equipment

S. 95.1.2 Repair of communication equipment

S. 95.2 Repair of personal and household goods

S. 95.2.1 Repair of consumer electronics

S. 95.2.2 Repair of household appliances and home and garden equipment

S. 95.2.3 Repair of footwear and leather goods

S. 95.2.4 Repair of furniture and home furnishings

S. 95.2.5 Repair of watches, clocks and jewellery

S. 95.2.9 Repair of other personal and household goods

**S 96 Other personal service activities**

S. 96.0 Other personal service activities

S. 96.0.1 Washing and (dry-)cleaning of textile and fur products

S. 96.0.2 Hairdressing and other beauty treatment

S. 96.0.3 Funeral and related activities

S. 96.0.4 Physical well-being activities

S. 96.0.9 Other personal service activities n.e.c.

# T - Activities of Households as Employers; Undifferentiated Goods- and Services-Producing Activities of Households for Own Use

**T 97 Activities of households as employers of domestic personnel**

T. 97.0 Activities of households as employers of domestic personnel

T. 97.0.0 Activities of households as employers of domestic personnel

**T 98 Undifferentiated goods- and services-producing activities of private households for own use**

T. 98.1 Undifferentiated goods-producing activities of private households for own use

T. 98.1.0 Undifferentiated goods-producing activities of private households for own use

T. 98.2 Undifferentiated service-producing activities of private households for own use

T. 98.2.0 Undifferentiated service-producing activities of private households for own use

# U - Activities of Extraterritorial Organisations and Bodies

**U 99 Activities of extraterritorial organisations and bodies**

U. 99.0 Activities of extraterritorial organisations and bodies

U. 99.0.0 Activities of extraterritorial organisations and bodies