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D5.1: Project Management Handbook

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RE	Restricted to a group specified by the consortium (incl. Commission Services)	
CO	Confidential, only for the members of the consortium (incl. Commission Services)	

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GLOSSARY OF TERMS

TERM	DEFINITION
ESAB	External Scientific Advisory Board
IPPR	Internal Project Progress Report
PC	Project Coordinator
PMB	Project Management Board
SC	Steering Committee

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1. INTRODUCTION

1.1 OBJECTIVES OF THE DELIVERABLE.

This deliverable has as main objective to document the internal procedures and the different kind of communication channels of the project, both internal and external, to clarify project management and information treatment, implementing and evaluating the communication flow in the project and thus avoiding problems that could come up as a result of a lack of communication among the partners. It has been built with the belief that the collection and organization of communication of data are an integral and critical part of the research process, and that its analysis and control will assist researchers in discovering answers to their research questions and hypotheses.

1.2 GOVERNANCE STRUCTURE AND COMMUNICATION FLOW

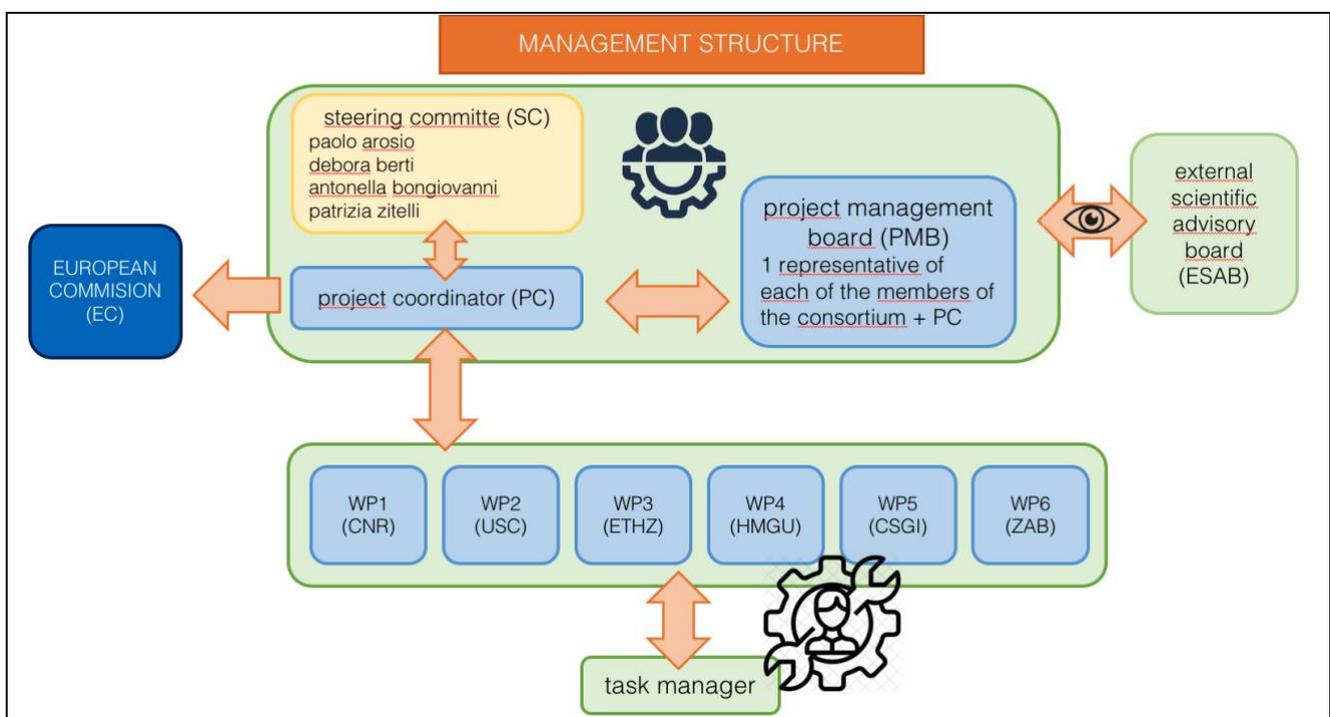


Figure 1. Governance structure

The governance of BOW - summarized in Figure 1 - is set to implement internal and external communication channels in the sense that favours communication flow between internal and external agents. This structure not only guarantees strict control of the quality of the project but is also a valuable indicator of the communication flow direction and activity.

On the other hand, internal communication flow also encourages the progress of the project. A clear example of that is the quality control that each deliverable goes through, before being sent to the European Commission (EU).

Default procedures have been provided in the Consortium Agreement at point 6.2 “General operational procedures for all Consortium Bodies”.



In case of conflicts, they will be solved at the lowest level possible, preferably amicably. If an agreement cannot be reached at task or WP level, the PC will mediate. If that is not satisfactory, the PMB will decide and, if needed, authorization from the EC will be required.

1.3 DELIVERABLE PRODUCTION AND QUALITY

The main technique that will be used for the document revision process is Peer Review. The Peer Review technique requires all agents who participate to the deliverable flow, to review each other's work. This technique is known to increase the level of quality of deliverables. It will also enable quality issues to be identified earlier in the project execution phase and, therefore, increase the likelihood of quality issues being solved earlier.

Deliverable reporting will start to be produced by the Lead of Deliverable at least 6 weeks before the delivery due date. This will allow enough time for the report to be circulated and revised (with the necessary feedback and reiterations) by all the agents who participate to the deliverable flow (Lead of Deliverable, Work Package Leader and Project Coordinator) and to be properly prepared for submission to the EU.

The deliverable flow is represented and summarized in Figure 2.

Below the indicative timetable for the deliverable development:

A	6 weeks before the deadline	Production of the 1st draft
B	6-3 weeks before the deadline	Review between lead of deliverables and WP leader
C	3 weeks before the deadline	Productions of 2nd draft
D	3-1 weeks before the deadline	Internal revision also involving the Project Coordinator
E	1 week before the deadline	Final revision submitted to the Project Coordinator



Figure 2: Deliverable flow scheme.



2. MAIN INTERNAL COMMUNICATION CHANNELS.

BOW establishes both telematic and on person communication channels among partners. The most suitable channel will be decided case by case, also considering the evolution of the Covid-19 pandemic crisis in Europe and the related travel restrictions.

2.1 TELEMATIC CHANNELS.

Daily communications and document exchange.

The mailing list of the contact people involved in BOW project from each partner has been finalized before the BOW Kick-Off meeting and saved in the shared Google Drive (https://drive.google.com/file/d/1yvSb-p6ZiSTUBI6ZTpF_Gkl5IElGLY/view?usp=sharing) (see also Section 2.2).

A new dedicated email address has been created - bow@csgi.unifi.it - and all communications to/from partners are made through it.

A permanent Google Drive shared workspace (<https://drive.google.com/drive/folders/1vZXZmJYsdOzEPIGuHGVCuX1yFMCD9542>) has been created by Zabala and made available to BOW partners. This area is meant to be a useful platform to allow partners to exchange information and data regarding the project and to store all the relevant documents that are part of the BOW project. In the shared area the confidential documents that cannot be shared with the general public (e.g. confidential deliverables, work packages related documentation, etc.) will be stored too. A weekly back up of all files is programmed. The access to this area is only allowed to the aforementioned mailing list of the contact people involved in the project.

The Google Drive shared workspace, called BOW Project, is composed as follows:

WP1	In progress documents from WG1 beneficiaries
WP2	In progress documents from WG2 beneficiaries
WP3	In progress documents from WG3 beneficiaries
WP4	In progress documents from WG4 beneficiaries
WP5	In progress documents from WG5 beneficiaries
WP6	In progress documents from WG6 beneficiaries
Kick-Off-Meeting	Kick-Off-Meeting documents
Before the beginning	All documents relating to the period before the start of the project
News	All updates related to the project
Final Deliverables	Finalised version of Deliverables uploaded on the EU portal, in release number order
Official Documents	All finalised official documents, GA and CA included
BOW MAILING LIST	Excel file containing partners' name, email address and telephone number.

The above structure could be revised/implemented, based on the project's needs.



WP meetings (normally telematic)

Informal technical meetings, on a specific WP, may be convened by the WP Leader, whenever deemed necessary. Preparation materials will be defined time by time.

Bimonthly technical meetings on project progress.

During the Kick-Off Meeting, BOW Coordinator proposed to meet on a conference call, normally every two months, to keep up to date on the progress of the project. At least one person from each organization will have to be present at the meeting, to discuss the evolution of technical and scientific work packages (WPs) and the development of dissemination and exploitation activities.

A brief Internal Project Progress Report (IPPR) (Figure 5) shall be filled by the partner responsible for the Task concerned (i.e. all the ongoing Tasks according to the GANTT chart) and uploaded in the shared area by 5 working days before the video-conference meeting date. See Section 2.3. for details on the IPPR.



2.2 FACE-TO-FACE CONSORTIUM MEETINGS

Face-to-face meetings are necessary and strongly recommended for the proper development of the project as they improve communication between partners. During a meeting in person, you can easily check the real progress of the project, its strengths and weaknesses.

This will help the partners to focus on those fields that have slower development or are encountering problems. Unfortunately, due to the current COVID-19 pandemic crisis, it will not always be possible to organize face-to-face meetings. In this case, the event shall be organized telematically through an online platform (such as Google Meet, WebEx, etc..) or, alternately, it shall be postponed.

BOW Consortium agreed to hold two different kinds of personal meetings (alternatively online meetings in case personal meetings are not possible):

1. Biannual (six-monthly) meeting.

The main objective of these meetings is to discuss and monitor scientific, dissemination and management progress and, eventually, to define necessary actions to be taken and solve urgent issues.

Each partner must prepare a presentation with its advances in the last months that should be uploaded in the shared platform for the Work Package leader review, at least 7 working days before the meeting.

2. Review meetings.

Review meetings with the European Commission (EC) in Brussels, at any time requested by the EC, in order to explain the progress of the project and the work carried out by the partners.

The first event was the project Kick-Off meeting, held online on November 5th-6th, 2020. Figure 3 and Figure 4 show, respectively, a picture of the meeting participants and the agenda.



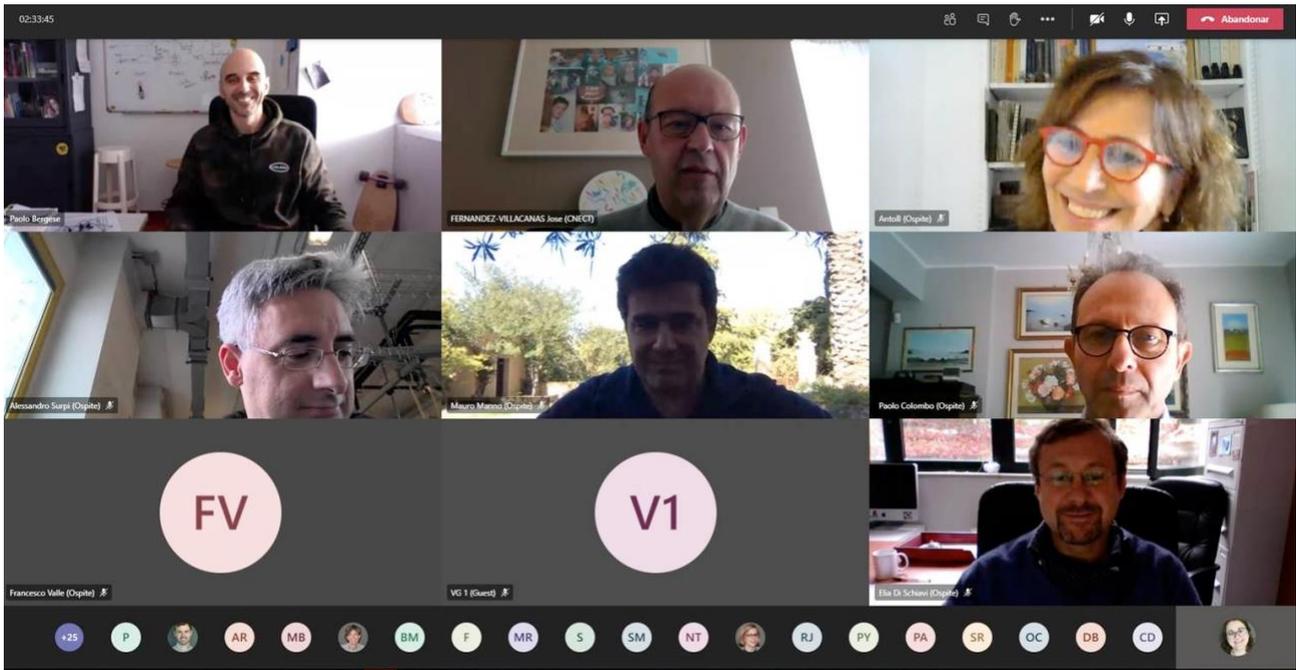


Figure 3. Online Kick-Off Meeting participants: November 5th-6th, 2020

KICK-OFF MEETING

Brescia and telematic, Thursday 5 November and Friday 6 November 2020

The meeting will be held both in person and online.

Please, confirm your modality of participation, including participation to the dinners, ASAP and not later than Mon 26/10 to Patrizia patrizia@csgi.unifi.it and Andrea Zendrini (Zen) andreazendrini@gmail.com.

Agenda

Wed 4/11

20:00. Spiedo (i.e. Brescia's way pre-social dinner, for those who are already in Brescia). Place tba.

Thu 5/11 10:00 – 10:30. Get together

10:30 – 12:00. Welcome and WP5 (project coordinator; Jose Fernandez-Villacanas, project officer)

12:00 – 13:00. Lunch

13:00 – 14:00. WP1 (CNR)

14:00 – 15:00. WP2 (USC)

15:00 – 16:00. Break

16:00 – 17:00. Technical round table coordinator)

17:00 – 18:00. WP6 (ZAB)

19:30. Social Dinner. Place tba.

Fri 6/11

8:30 – 9:15. WP5 (CSGI)

9:15 – 10:15 WP3 (ETHZ)

10:15 – 11:00 Break

11:00 – 12:00 WP4 (HMGU)

12:00 – 13:00 Technical round table

13:00 – 13:30 Wrap up and next moves

Online venue

Microsoft Teams will be used, and the invitation link sent to you by email.

Link for the online meeting (Teams) on Thu 5/11: [BOW Kick off Day 1](#)

Link for the online meeting (Teams) on Fri 6/11: [BOW Kick Off Day 2](#)



For any further info on the online venue, ask Blanca BRodriguez@zabala.es

In person venue

Sala della Biblioteca di Economia, Università degli Studi di Brescia, via San Faustino 25122 74B, Brescia.

NOTE: Access to the university spaces is subject to strict compliance with all the safety requirements in force and with the measures to combat and contain the spread of the SARS-CoV-2 virus in the workplace and in general in all spaces of public use or open to the public. All the participants must print front/back, fill and deliver to the organizers the attached self-certification of health conditions and privacy policy for the purpose of entering the university spaces.

Travelling

- Sala della Biblioteca di Economia is an historical room of our Department of Economics and Management <https://en.unibs.it/departments/economics-and-management>, which is downtown.

A very good place to stay is <https://www.albergoorologio.it/> (5* on booking.com). But you can find several other hotels or Airbnbs solutions minute walk from the meeting venue.

- Brescia is in between Venezia and Milano. You can fly to any airport of Milano and get to Brescia by shuttlebus. the best options are the Ryanair hub <https://www.milanbergamoairport.it/en/> or <https://www.aeroporto.verona.it/en/>. Brescia is also well served by trains and lies on a thick highway web. Parking is not a problem.

- For any further info on travel, ask Zen.

- Periodic report meeting. Review meetings with the European Commission (EC) in Brussels, at any time requested by the EC, in order to explain the progress of the project and the work carried out by the partners.

Figure 4. Online Kick-Off Meeting Agenda: November 5th-6th, 2020

Due to the evolution of the Covid-19 pandemic crisis in Europe and the related travel restrictions, the above agenda does not conform to what happened, since the meeting has been held telematically and not personally.



2.3 INTERNAL REPORTS

Every 2 months, a brief Internal Progress Report (IPPR) (Figure 3) will be provided by the by the partner responsible for the Task concerned (i.e., all the ongoing Tasks according to the GANTT chart) and uploaded in the shared area at least 5 working days before the video-conference meeting date.

Partner Responsible (partner, personnel name)	Date (MM/DD/YYYY)
Other involved partners - if any (partner, personnel name)	
Related Work Package and specific tasks	
Description of the work (brief list)	
Problem associated with work and solution	
Contingency plans for no resolved problems	
Notes and conclusions	

Figure 5. Internal Project Progress Report (IPPR) template



3. MAIN EXTERNAL COMMUNICATION CHANNELS.

BOW project has three ways of communication with external agents:

3.1 BOW PROJECT WEBPAGE.

The project website and social media are described from the Lead Beneficiary Zabala Innovation Consulting in D6.2 (Project Identity).

3.2 COMMUNICATION WITH EUROPEAN COMMISSION: REPORTING PERIODS.

Three official reporting periods were agreed:

- First period (M1-M12): 01/11/2020 to 31/10/2021. The reporting date for the first periodic report is 60 days after end month 12. Report due on 31/12/2021.
- Second period (M13-M30): 01/11/2021 to 30/04/2023. The reporting date for the second period report is 60 days after end month 30. Report due on 30/06/2023.
- Third period (M31-M48). 01/05/2023 to 31/10/2024. The reporting date for the third periodic report is 60 days after end month 48. Report due on 31/12/2024.

In addition to the periodic reports, a final report will be prepared within 60 days following the end of the last reporting period. Report due will be 31/12/2024.

Furthermore, three deliverables related to each reporting period will be provided before review meetings:

- D5.3 - 1st Periodic Progress Report (M1-M12): 01/11/2020 to 31/10/2021. Deliverable due on 30/11/2021.
- D5.4 - 2nd Periodic Progress Report (M13-M30): 01/11/2021 to 30/04/2023. Deliverable due on 31/05/2023.
- D5.6 - 3rd Periodic Progress Report (M31-M48). 01/05/2023 to 31/10/2024. Deliverable due on 31/10/2024.

The final technical report must be a publishable summary of the entire action, describing the overview of the results and their exploitation and dissemination, the conclusions on the action and its socio-economic impact.

The final financial report will be automatically created by the Participant Portal system. In some cases (*if a total contribution as direct costs of EUR 325 000 or more is requested*) a certificate on the financial statement needs to be provided by beneficiaries/linked third parties.



Beneficiary	Total direct costs contribution (€)	FSC
CSGI	422.400	YES
CNR	611.362	YES
USC	304.625	NO
MPG	276.500	NO
ZAB	159.000	NO
HMGU	520.284	YES
ITS	105.000	NO
ETHZ	295.200	NO
HBM	263.800	NO
BIO	215.230	NO
RR	299.640	NO

The periodic report for the last reporting period covers only the last period, while the final report must give an overview of the action's results over its entire duration.

Technical and financial consolidated reports from the whole Consortium must be submitted by the Project Coordinator to the EC within 60 days after the end of each reporting period.

The Coordinator will establish an internal deadline to guarantee enough time to revise the submitted statements.

Each (periodic or final) report will be prepared and submitted directly by the Coordinator with the support of the partners. At the same time, each beneficiary will fill out its financial statement on the EU system which will then be checked and validated by the Coordinator.

Technical reports must contain an explanation of the work carried out and an overview of the project progress.



3.3 PAYMENTS

According to C.A. Art 7.3.2., fundings are transferred to partners in separate instalments:

- One pre-financing
- Interim payments
- Payment of the balance.

The 50% of the pre-financing has already been transferred to all Partners (see Figure 6):

		Total budget	pre-financing 48,33333333%	1 transfer
1	CSGI	€528.000,00	€255.200,00	€127.600,00
2	CNR	€764.202,50	€369.364,54	€184.682,27
3	USC	€380.781,25	€184.044,27	€92.022,14
4	MPG	€345.625,00	€167.052,08	€83.526,04
5	ZAB	€198.750,00	€96.062,50	€48.031,25
6	HMGU	€650.355,00	€314.338,25	€157.169,13
7	ITS	€232.500,00	€112.375,00	€56.187,50
8	ETHZ	€369.000,00	€178.350,00	€89.175,00
9	HBM	€329.750,00	€159.379,17	€79.689,58
10	BIO	€269.037,50	€130.034,79	€65.017,40
11	RR	€374.550,00	€181.032,50	€90.516,25
		€4.442.551,25	€2.147.233,10	€1.073.616,55

Figure 6. Pre-financing payments

Each 6 months partners may send an informal financial form accounting for the costs incurred during those months. Please see below template, for reference:

Eligible costs per budget category							EU contribution	
A. Direct personnel costs			B. Direct costs of subcontracting	D. Other Direct Costs	E. Indirect costs	Total Cost	Reimbursement rate% (100 or 70)	Maximum EU contribution
A.1 Employees (or equivalent); A.2 Natural persons under direct contract; A.3 Seconded persons		A.4 SME owners without salary; A.5 Beneficiaries that are natural persons without salary		D.1 Travel; D.2 Equipment D.3 Other goods and services.				
Form of costs	Actual	Unit	Unit (XX EUR/hour)	Actual	Actual	Flat-rate (25%)		
			No hours Total					
						€0,00	€0,00	€0,00



Direct personnel costs	
Person months	Associated WP
[insert number pm]	WP1
[insert number pm]	WP2
[insert number pm]	WP3
[insert number pm]	WP4
[insert number pm]	WP5
[insert number pm]	WP6
0	TOTAL

Direct costs of subcontracting			
Description	Foreseen in Annex 1 (YES OR NO)	Explanation if not foreseen in annex 1	Costs
One row per item			€ 0,00
TOTAL			€0,00

Other direct costs					
Short description	Category (choose if Travel, Equipment or Other goods & services)	Associated WP	Foreseen in Annex 1 (YES OR NO)	Explanation if not foreseen in annex 1	Costs
One row per item	[Travel] [Equipment] [Other goods & services]				
TOTAL					€ 0,00

Figure 7. Six-monthly internal form Template

This is compulsory only for partners requiring the reimbursement for the expenses.

At the end of each Interim Reporting Period, partners are required to submit an official financial statement through the EU portal accounting the costs incurred during the period:

- **RP1:** November 1st 2020 - October 31st 2020 (M-12)
- **RP2:** November 1st 2020 - April 30th 2023 (M-30)
- **RP3:** May 1st 2023 - October 31st 2024 (M-48)

Payment from EU will be done 90 days from reception of periodic reports and EU contribution will correspond to the eligible costs incurred in that reporting period. Of course, ineligible costs will be rejected.

As regards the payment of the balance (*according to G.A art 21.2 Guarantee fund and G.A art 21.3 Limit to 90% of the maximum grant amount*), before the end of the project, BOW Consortium will receive max 85% of the total EU grant and the payment of the residual amount from EU will be done 90 days from reception of final report.

EU contribution will correspond to the remaining part of eligible costs incurred; If payments made exceed the final grant amount, there will be a recovery from EU.



3.4 DISSEMINATION, COMMUNICATION AND OPEN ACCESS.

Dissemination and communication

For the implementation of the BOW project, there is a complete dissemination and communication set of activities scheduled, with the objectives of training young scientists and operators in new skills, connecting with relevant actors in the current international and EU research scenes and paying attention to plan a future EU industrial roadmap. Details about all those dissemination and communication elements are provided in the Deliverables D6.1 (M3) and D6.6 (M24) - “Project Exploitation and Dissemination plan”.

All partners agreed to approve a dissemination process. The result was the following: During the Project and for 1 year after the end of the project, the dissemination of own Results by one or several Parties including but not restricted to publications and presentations shall be governed by the procedure of Article 29.1 of the Grant Agreement subject to the following provisions.

Prior notice of any planned submission shall be given to the PMB at least 15 calendar days before the publication or presentation. Any objection shall be made following the Grant Agreement in writing to the Coordinator and the Party or Parties proposing the dissemination within 7 calendar days after receipt of the notice.

If no objection is made within the time limit stated above, the submission is permitted.

An objection is justified if:

(a) the protection of the objecting Party's Results or Background would be adversely affected

(b) the objecting Party's legitimate interests concerning the Results or Background would be significantly harmed.

The objection has to include a precise request for necessary modifications. If an objection has been raised the involved Parties shall discuss how to overcome the justified grounds for the objection on a timely basis (for example by an amendment to the planned publication and/or by protecting information before publication) and the objecting Party shall not unreasonably continue the opposition if appropriate measures are taken following the discussion.

The objecting Party can request a submission delay of not more than 30 calendar days from the time it raises such an objection. After 30 calendar days the submission is permitted.

Open Access

Open access to scientific peer-reviewed publications has been anchored as an underlying principle in the Horizon 2020 Regulation and the Rules of Participation and is consequently implemented through the relevant provisions in the grant agreement.

According to Article 29.2 of the Grant Agreement and section 8.4.2.2. of the Consortium Agreement, Parties shall ensure open access (free of charge online access for any user) to peer-reviewed scientific publications relating to its project results, unless it goes against their legitimate interests. Each party shall ensure also the open access to research data as ruled by Article 29.3 of the Grant Agreement. The Coordinator is entitled to claim





compensation from the defaulting partner in case the Funding Authority applies a penalty to the Consortium for its breach of the obligation under article 29 of the Grant Agreement.



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