

BEYOND

D1.1 - Project handbook

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EU Project Officer	Stavros STAMATOUKOS
Project Coordinator	UBITECH
Consortium Partners	VTT, FVH, CIRCE, Suite5, IGM, KONCAR, ARTELYS, MYTILINEOS, CUERVA, BELIT, URBENER, BEOELEK,
Project Website	beyond-h2020.eu
Cordis	https://cordis.europa.eu/project/id/957020



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D1.1 - Project handbook

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EXECUTIVE SUMMARY

The specific deliverable entitled “Project Management Handbook” provides the definition of the processes and mechanisms to be utilized and followed during the lifecycle of BEYOND project towards the successful execution of its tasks and achievement of its objectives. Its purpose is to identify the processes, the metrics and the supportive documentation that is required and needs to be defined and deployed so as to ensure the high-quality of BEYOND deliverables and project management activities.

In BEYOND project, complying with the project management procedures falls under the responsibility of the Project Coordinator, as well as the Work Packages leaders and Tasks leaders. Effective channels of internal communication have been established since M1 in order to exchange all the necessary information for the project implementation among the participants. The means for remotely conveying information for the BEYOND purposes range from e-mail communication through dedicated mailing lists and teleconferencing facilities to an internal collaboration space for document management and task management activities. Regarding the project meetings, an analysis of expectations and responsibilities has been performed while a tentative schedule of project meetings for the whole implementation of the BEYOND project has been prepared.

The implementation aspects regarding co-creation and consultation mechanisms, official and internal reporting procedures, decision-making and conflict resolution processes to be applied during the BEYOND implementation have been defined in detail. Document control aspects regarding the documentation requirements, templates and naming conventions and versioning have been also specified and agreed.

Finally, emphasis is laid on quality assurance of results, which is achieved with the help of audit control mechanisms internal to the consortium for the deliverables and appropriate corrective actions to be taken. A specific quality procedure shall be followed at preparation time of all deliverables. In order to facilitate the internal review process, reviewers (apart from the Project Coordinator and the deliverable responsible partners) have been already assigned (for the first reporting period) for each deliverable for early planning of the necessary effort.



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INTRODUCTION

The purpose of the present deliverable entitled “Project Handbook”, provides a quick overview of the project management structure and the most relevant managerial aspects to be followed, based on a proper implementation of the general mechanisms of work and setting the rules and responsibilities of the BEYOND consortium. The objective is to ensure a high-quality progress of the work during the project lifetime. This includes the production of the deliverables and other project outcomes, the mechanisms for their submission and the internal review process, and which are the communication means among partners (i.e. meetings, mailing lists, project collaborative space).

In this context, the present deliverable aims to fulfil the following main objectives:

- Establish a quality management system in accordance with the ISO 9001 (Quality Management Systems - Requirements) standard;
- Assure the quality of the project deliverables and project management activities;
- Identify the quality responsibilities of all partners within the consortium;
- Ensure proper co-ordination and communication channels among partners during the project lifetime.

The Project Handbook structures as following:

- Section 1 Consortium composition, contacts and management structure provides an overview of the consortium composition, the roles undertaken as well as the management structure;
- Section 2 presents the processes to be followed concerning Decision Making and Conflict Resolution among BEYOND Partners;
- Section 3 presents the project reporting procedure and the respective payment arrangements;
- Section 4 describes the processes foreseen to handle deliverables submission as well as the quality management mechanisms;
- Section 5 presents in detail the communication mechanisms established in order to maximize the awareness and collaboration among BEYOND Partners.
- Section 6 presents a introduction to Knowledge and intellectual property management.



1. Consortium composition, contacts and management structure

1.1 Consortium composition, contacts and management structure

Official contact information of each of the Project Participants is included in the BEYOND Grant Agreement. The full list of project participants, along with subscription to mailing lists is maintained as a living document in the BEYOND Project Repository as a document restricted to the consortium. Partners are responsible to inform about any modification of their representatives both the Project Coordinator and the Project Management Steering Committee or the respective WP leader, who will be responsible for informing the rest of the members (if necessary).

1.2 Management Structure

The consortium management of BEYOND aims to:

- Ensure timely and qualitative achievement of BEYOND results taking adequate corrective action where necessary,
- Provide decision making, quality control and conflict resolution mechanisms to support BEYOND implementation and evolution,
- Provide timely and efficient legal, contractual, financial and administrative coordination of the project
- Coordinate at consortium level knowledge management and other innovation-related activities,
- Support preparation of exploitation and dissemination of results.

The project structure is designed to handle the most important aspects of management, namely decision-making, IPR policy, technical and administrative management, advisory functions and assessment. The overall management of the project will be facilitated by a consistent and formal approach. In any event, a detailed internal Project Plan will be defined in the preliminary stage of the project, to support the contractual Work Plan and to form the basis of the administrative structures and procedures to be used. The reporting lines and decision-making procedures are described in detail in the following sections.

The primary aim of this management structure is to be capable of responding to the needs of an Innovation Action without being intrusive or costly. The project management structure is based in a shallow management hierarchy, as shown in the following figure, with transparency in the information flow in order to facilitate a team



of empowered and motivated individuals to respond to the needs of new products development and large demonstrations.

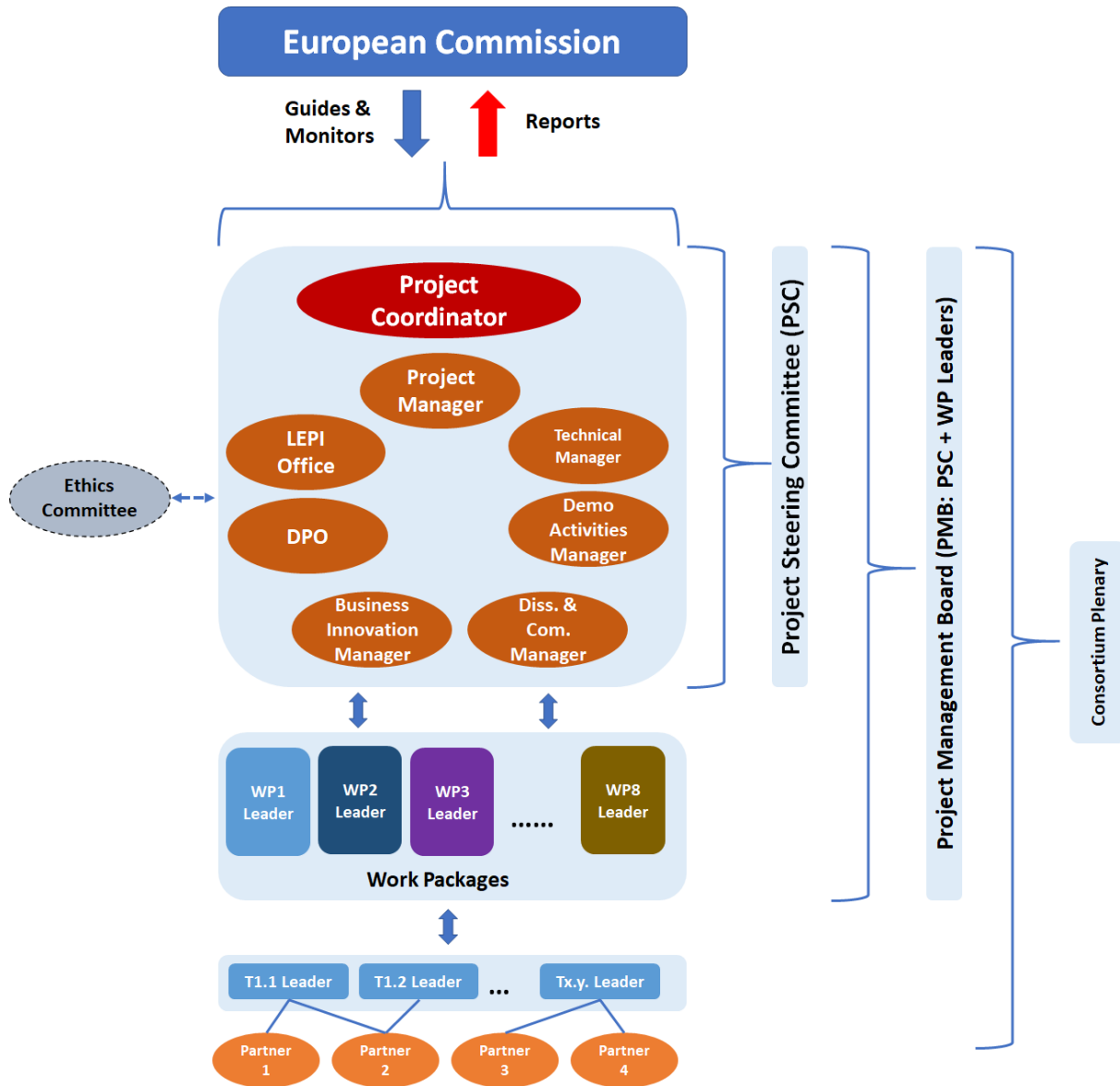


FIGURE 1: BEYOND MANAGEMENT STRUCTURE

Description and duties of these entities (Figure 1) are fully described in the Grant Agreement and are thus only briefly reported here:

1.2.1 Main Roles

- **Project Coordinator (PC)** – The PC will act as the primary contact point, the main project representative and the formal communication point for the



European Commission (EC). The PC is responsible for the overall project coordination and the administrative and financial project management. The PC plans overall project execution and administers project resources according with the project Description of Action (DoA) and the Consortium Agreement. The main task of the PC is to report to the EC on progress, changes in the project consortium or the project work plan as well receipt of feedback on the research results of each work package.

- **Project Manager (PM)** – The PM will ensure that the work packages and tasks achieve the expected results and the project makes adequate and timely progress towards achieving its objectives. For this, the PM will have to keep in close contact with the WP leaders to ensure that the intended deliverables are produced, according to the planned schedule and are delivered to the EC and the project reviewers as required. The PM will convene and chair the regular technical meetings of the Project Steering Committee. The responsibilities of PM include mediation and dispute resolution in cases of conflict and application of contingency measures in cases of non-performance of a partner, failure to produce the necessary research results, recruiting failure, or resourcing problems. Finally, the PM will be responsible for ensuring that the Consortium Agreement including issues of Intellectual Property Rights and any other legal documents are properly prepared, followed and managed.
- **Technical Manager (TM)** who supports the PC in technical matters, e.g., strategic decisions regarding technical designs and implementations. The TM has a transverse vision of the project's technical issues.
- **Dissemination and Communication Manager (DCOM)** who will be responsible for all dissemination and communication activities and direct interaction with end-users, mass media and energy sector stakeholders. DCOM will lead the definition of the project website structure and functionalities, being part of the project website, a Project Library, i.e. a collaboration working space for the exchange, sharing and storage of project documentation (deliverables, white papers, agendas, minutes, reports, etc.)
- **Business and Innovation Manager (BIM)** will be in particular responsible for the exploitation activities and innovation management.
- **Demonstration activities Manager (DEM)** will coordinate demonstration activities of the project;
 - the **Legal and Policy Issues Officer (LEPI)** will be the coordinator of all the activities related to legal and policy issues that may arise in the project;



- the **Data Protection Officer (DPO)** will supervise the data protection and information security aspects including also the alignment with the new GDPR regulation.
- **Demo Leaders** play a key role in this management structure, focusing on a project with a strong presence of demo sites and with a clear orientation to large scale demonstrations. This way, demo sites will have a partner in charge of representing the whole demo site in case of specific requirements coming from WPs or to prepare presentation during consortium meetings.
- **WP leaders (WPL)** are responsible for activities and objectives specified in the Work Packages of the project plan, as well as for carrying out the respective deliverables with high quality and on time, and ensuring no delays in the accomplishment of the tasks. WPLs will coordinate the activities within the WPs.
- Within each work package the **Task leaders (TL)** will be the directly responsible for the day-to-day work needed to carry out the tasks related to their specific activity. Their coordination work is not subject to any additional administrative or reporting burden; instead, they will act as team leaders of all the individuals from the different partners involved in a specific task.

Role	Partner	Representative
Project Coordinator	UBITECH	Dimitrios Alexandrou
Project Manager	UBITECH	Eleni Tsironi
Technical Manager	SUITE5	Sotiris Koussouris
Dissemination and Communication Manager	UBITECH	Ioannis Avramidis
Business and Innovation Manager	SUITE5	Tasos Tsitsanis
Demonstration activities Manager	MYTILINEOS	Vasilis Nikolopoulos
Legal and Policy Issues Officer	UBITECH	Legal office of UBITECH
Data Protection Officer	UBITECH	Sophia Karagiorgou

TABLE 1: MAIN ROLES IN THE BEYOND PROJECT MANAGEMENT BOARD

WP No	WP Description	Lead Beneficiary (No- Short Name)
WP1	Project Management and Ethics Coordination	1 – UBITECH
WP2	Use Cases, Business Requirements and Architecture Design	4 - CIRCE



WP No	WP Description	Lead Beneficiary (No- Short Name)
WP3	End-to-end Interoperable Big Data Management Platform	5 – SUITE5
WP4	AI Big Data Analytics Toolkit with Data Sharing Functions	5 – SUITE5
WP5	AI Analytics-based Decision Support Suite for Optimizing Energy Policy Planning, Infrastructure Sizing and De-risking Renovation Investments	8 - ARTELYS
WP6	AI Analytics-based Innovative Energy Services Suite towards Optimized Buildings Energy Performance Management	2 – VTT
WP7	Demonstration and Impact Assessment	9 – MYTILINEOS
WP8	Dissemination, Stakeholder Engagement and Business Innovation	1 – UBITECH
WP9	Ethics requirements	1 – UBITECH

TABLE 2: WPs LEADERS

1.2.2 Project Bodies

Project Steering Committee (PSC) is the major decision-making body of BEYOND. It comprises one member from each project partner. The Steering Committee will meet every six months in order to provide quick and efficient response to the events that will arise during the project. The purpose of the meetings is to discuss in detail the project's progress and to decide on and evaluate project general technical directions on a regular basis. For this, PSC will receive reports from each WP Leader and each theme leader. PSC will decide, whether the progress in each WP is acceptable, and if necessary, amendments in the work plan, shift resources or initiate contingency actions. PSC will further discuss and decide on the project finances, issues of intellectual property rights, and major disputes. Reasons for any deviations from the project plan will be identified and the necessary corrective actions will be agreed by the PSC. In cases, where the Project Coordinator feels the need to discuss urgent matters with the whole Steering Committee, apart from the regular meetings (2 times per year), he will convene an additional electronic meeting of the PSC. Each member of the Steering Committee has one vote, which may be made by proxy, if necessary. Preferably, PSC's decisions are taken by consensus. If this turns out not feasible, decisions will be taken by majority vote with the PC retaining the casting vote. The full list of the matters handled by PSC and the detailed procedures for decision-making and voting are set out in the Consortium Agreement.

The **Project Management Board (PMB)**, is composed of WP leaders (WPL), responsible for activities and objectives specified in the Work Packages of the project plan, and the PSC. The PMB will convene once a month to discuss the progress of the



individual WPs. Within each work package the Task leaders (TL) will be the direct responsible for the day-to-day work needed to carry out the tasks related to their specific activity. Their coordination work is not subject to any additional administrative or reporting burden; instead, they will act as team leaders of all the individuals from the different partners involved in a specific task.

The **Consortium Plenary (CP)** is composed by all partners and acts as the key liaison between the project and partner organizations. In the CP meetings the Project Coordinator will present the project's status and plans for the next period. Representatives of the partners will be able to voice their opinions and ask for more elaborated information on the progress and plans. The CP meetings shall take place twice a year and, if possible, in conjunction with scientific/technical dissemination activities.

The **Ethical Advisory Committee (EAC)** will be established in the project to closely monitor any ethical issues that may raise in the project due to the management and processing of a multitude datasets, while involving legal related expertise to safeguard the legitimacy of the data sharing contracts to be delivered as part of the project activities. The Ethics Advisory Committee (EAC) will be responsible for guiding and monitoring that ethic issues are properly handled in BEYOND and will act as an independent advisory body, to the LEPI and the DPO. More details on the EAC are provided in D1.3 Ethics Monitoring Report.

No	Partner	Main Representative	Deputy
1	UBITECH	Dimitrios Alexandrou	Eleni Tsironi
2	VTT	Francesco Reda	Sami Kazi
3	FVH	Timo Ruohomäki	Lasse Sariola
4	CIRCE	Victor Ballestin Trenado	Marcelino Gallego Garcia
5	SUITE5	Sotiris Koussouris	Tasos Tsitsanis
6	IGM	George Bourdalas	Ioanna Bourdala
7	KONCAR	Leila Luttenberger Marić	Hrvoje Keko
8	ARTELYS	Alexandre Marié	Vincent Renault
9	MYTILINEOS	Alexander Vavouris	Zacharis Evangelos
10	CUERVA	Jorge Rueda Quintanilla	Blanca Sintas
11	BELIT	Milan Vukovic	Djordje Lazic
12	URBENER	Olga Marco	Lucía Garín
13	BEOELEK	Radmilo Savic	Tatjana Tomic - Jankovic

TABLE 3: PROJECT STEERING COMMITTEE MEMBERS



2 Implementation Aspects

2.1 Decision making

Decisions regarding the project implementation will normally be taken by the team members upon reaching consensus with the WP leaders. Typically, agreement will be reached first by informal contact, followed by official confirmation via electronic mail, letter or agreed written minutes. In case there is a dispute between two or more team members, a conflict resolution procedure must be followed, as presented in the specific document.

For important issues, the agreement may take the form of a short report that needs to be signed by the Steering Committee. Non-technical factors such as resource allocation and contractual terms will also need to be agreed and documented in writing.

The key driver on the decision-making procedures is the description of work to be performed as stated in the Contract, the Consortium Agreement, the DoA and the Quality Plan, and as regularly communicated within the consortium. Transparency of the implementation decisions and actions will be achieved by adequate communication of the emerging issues on project meetings and e-mail communications.

2.2 Conflict Resolution

Generally, technical issues or conflicts within the contractual commitments that do not involve any contract, budget, resource allocation or overall project focus changes will be discussed at work package level first.

If the decision reached between team members is unacceptable by other partners, the conflict will be resolved according to a conflict resolution procedure which can be summarized in the next steps:

1. The team members involved in the implementation of the work package will inform the WP leader for the emerging conflict.
2. The WP leader will decide whether the issue needs to be discussed in a teleconference or a dedicated WP Meeting. The WP Leader will inform the PM for the planned actions.
3. The result of the teleconference or the meeting will be communicated to the PM.
4. If no consensus has been reached so far, the PM will contact the responsible persons and will try to resolve the conflict.



5. In case that the disagreement remains, the issue will be escalated in the Steering Committee. The decision that will be taken at this level will be considered as the final resolution of the issue.



3. Reporting Procedure and Payment Arrangements

The project reporting is the procedure used by the EC to assess and follow up on the financed projects. Therefore, it is of utmost importance, as its conditions in a very direct way the good image and good assessment of the project by the EC. It is important to remark that the project reporting is a responsibility of the whole Consortium and every partner has to be actively involved in it. The Project Coordinator is the responsible for periodically gathering the information and reports from the different partners and consolidating it before sending it to the EC.

There are two types of reporting documents including technical and financial information: The **Project Periodic Report** and the **Internal Activity Report**. The Project Periodic Report refers to the official report that must be submitted to the EC according to the EC guidelines and templates. The Internal Activity Report refers to internal documents that will be used as control measures to effectively monitor the technical and economic progress of the BEYOND project. The Internal Activity Reports will also feed the official reports.

3.1 Reporting Procedures

3.1.1 Internal Activity Report

BEYOND Internal Activity Reports have to be prepared by consortium partners and provided to the project coordinator two times per year (every six months). An Internal Activity Report shall contain:

- (a) Technical Information about the WP progress as provided by the respective WP leaders,
- (b) Effort Information as all partners will be requested to provide a breakdown of the effort spent in the related semester, per WP in comparison to the planned effort.

The procedure to be followed is:

- A week before the end of the semester period, the Project Coordinator will send to the consortium an email with instructions and the template to be filled in;
- Each Partner has to fill in:
 - a. Short description of work done (per WP and Task),
 - b. achievements and results,
 - c. problems occurred,
 - d. Brief overview of planned activities for upcoming semester
 - e. Overview of dissemination/exploitation/cooperation/standardisation activities



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- f. An estimation of resources spent (PMs) per WP in the respective reporting semester against the actual total PMs per WP
- The partners send their report to the Project Coordinator; this has to happen 20 days after the closure of the period.
 - Finally, the Project Coordinator consolidates the Internal Activity Report and shares it with the consortium once finalized.

3.1.2 Project Periodic Reports

During the BEYOND project, two (2) official Project Periodic Reports must be submitted to the EC by the Project Coordinator, covering the periods **P1 (from Month 1 to Month 18)**, and **P2 (from Month 19 to Month 36)**. The reports shall be submitted to the EC for each reporting period within 60 days after the end of the period under assessment. The delay in the submission of these reports may cause the postponement of part of the next payment to be received by the partner until the next reporting period. The technical part will be managed through corresponding Project Periodic Reports. The Project Coordinator is in charge to prepare the specific reports based on the information provided through Internal Activity Reports.

The financial status of the project and costs incurred during the period must be communicated to the EC through meticulously prepared Financial Statements (FS) in order to justify the incurred costs and expenses and qualify for the next/final payment. Each consortium partner has to upload financial information to the EC participant portal (ECAS) based on cumulative information obtained from the Interim Activity Report.

The procedure to be followed is:

- The Project Coordinator will ask the partners to generate their individual Financial Statements in the EC Participant Portal to officially declare the costs incurred for the reference period;
- Each partner will complete the financial statements with the costs incurred during the period;
- Each partner will submit and digitally sign the Financial Statement. This signature will be done by the Project Financial Signatory appointed; and
- The Coordinator will submit the financial report to the EC;

3.1.3 Project Final report

In addition to the final Periodic report, a Final Report has to be submitted by the coordinator 60 days after the end of the last reporting period.



3.2 Payment Schedule

The payment schedule, which contains the transfer of pre-financing and interim payments to Parties, will be handled according to the payment schedule of the Consortium Agreement.

3.2.1 Payments to be made

Article 21 to the Grant Agreement establishes the payments to be made from the Commission to the Coordinator, and from the Coordinator to the rest of the consortium.

3.2.2 Pre-financing payment – Amount retained for the Guarantee Fund

The amount of the pre-financing payment will be EUR **3.199.958,40** (80% of the Maximum Grant Amount)

The amount of EUR **199.997,40** corresponding to 5% of the Maximum Grant Amount will be retained by the Funding Authority from the pre-financing payment and transferred into the '**Guarantee Fund**'.

The pre-financing amount will be paid in two installments, while part of it (10% of each Party's Maximum Grant Amount) will be retained and distributed according to the interim payment provisions:

pre-financing payment	40% of each Party's Maximum Grant Amount on receipt of Advance Payment	(expected) on Month 1 of the Project
	25% of each Party's maximum grant amount	on Month 13 of the project

3.2.3 Interim payments & final payment

For the **interim payment** that will be paid by the Funding Authority after receipt and approval of the periodic report (1st Reporting Period (RP1): Month 1 - Month 18); an amount ranging from 10%-20% or 0% of each Party's maximum grant amount, depending on the funding consumption of the respective Party for RP1, as follows:

Interim payment	0%	if funding consumption < 30%
	20%	if funding consumption > 75%
	10% linearly increasing* up to 20%	if 30% <= funding consumption <= 75%

* (every 1% increase in funding consumption results in 0,2222% increase in interim payment)



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- The funding consumption is defined as the percentage (on each Party's maximum grant amount) of the accepted funding by the Funding Authority of the Party's requested funding for RPI.
- For **the payment of the balance (final payment)**; the provisions of the Grant Agreement will be followed.



4. Deliverable Submission and Quality Management

4.1 Deliverable Submission

The different technical objectives set for the project have their correspondence within the work packages and defined tasks. Compliance with these technical objectives is evident by on-time delivery the corresponding Deliverables. Each deliverable is assigned to Lead Beneficiary partners who will be responsible of its elaboration in due date. Every Lead Beneficiary is fully responsible for the deliverable's quality and is required to maintain adequate control of the participants' contributions.

The deliverables shall be submitted to the EC in English, by electronic means (in pdf format in the Participants Portal) or in any other format only if required by EC. The appropriate and updated deliverable template can be found in the BEYOND Project Repository.

All the deliverables must be finalized and submitted to the EC within the deadlines defined in Annex I of the Grant Agreement.

The process to be followed for the deliverable preparation and submission is (see **Error! Reference source not found.**):

1. Lead beneficiary responsible for preparation of first draft
2. Lead beneficiary sends the completed deliverable draft to the PM-team one month before the contractual submission date (M_{x-1})
3. The PM-team checks the quality of the report and forwards it to the assigned internal reviewers
4. Comments from the PM-team and the internal reviewer(s) to be sent to the editor within 7 days
5. Update done by the editor within 7 days
6. Approval by Coordinator and if necessary, by reviewer within 4 days
7. Final check/release and submission to the EC within 3 days and until the actual submission deadline



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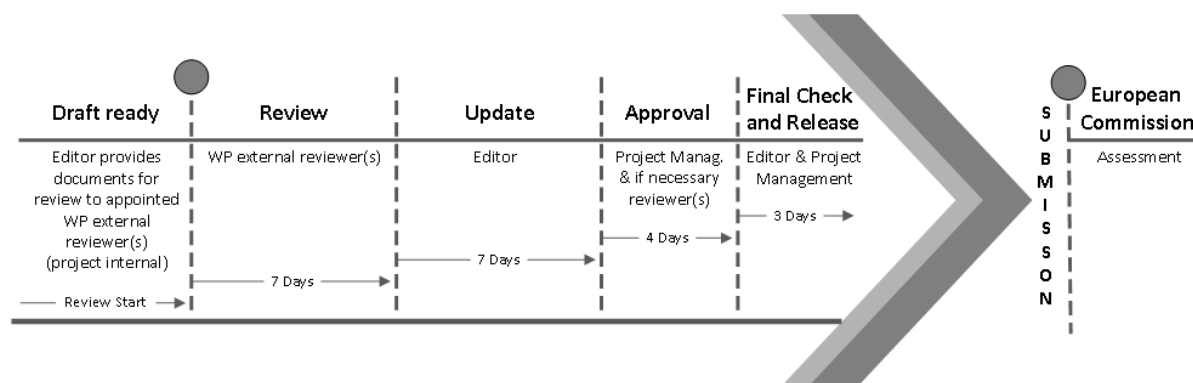


FIGURE 2: DELIVERABLE SUBMISSION TIMELINE

The following table illustrates all the project deliverables and the reviewing partners have been allocated for all deliverables.

Deliverable	Lead Benef.	Due M	Due Date	Assigned Reviewers
D1.1 - Project handbook	UBITECH	6	31 May 2021	CIRCE ARTELYS
D1.2 - Data Management plan	UBITECH	6	31 May 2021	ARTELYS BELIT
D1.3 - Ethics monitoring report	UBITECH	6	31 May 2021	SUITE5 KONCAR
D1.4 - Risk assessment report	UBITECH	6	31 May 2021	IGM CUERVA
D1.5 – Data Exchange Collaboration Activity Planning	SUITE5	6	31 May 2021	VTT BELIT
D1.6 - Interim Progress Report	UBITECH	10	30 Sep 2021	SUITE5 MYTILINEOS
D1.7 - BEYOND Final published report	UBITECH	36	30 Nov 2023	CIRCE SUITE5
D2.1 – End-user & Business requirements analysis for big data-driven innovative energy services & ecosystems - a	UBITECH	6	31 May 2021	SUITE5 KONCAR
D2.2 – End-user & Business requirements analysis for big data-driven innovative energy services & ecosystems - b	UBITECH	20	31 Jul 2022	SUITE5 KONCAR
D2.3 – Socio-economic and regulatory analysis of obstacles to innovation	CIRCE	6	31 May 2021	UBITECH IGM



Deliverable	Lead Benef.	Due M	Due Date	Assigned Reviewers
D2.4 – BEYOND PMV Methodology Specifications	CIRCE	8	31 Jul 2021	UBITECH VTT
D2.5 – Ex-Ante Pilot Audits and Pilot Deployment Plan	CIRCE	8	31 Jul 2021	VTT MYTILINEOS
D2.6 – BEYOND Framework Architecture including functional, technical and communication specifications - a	SUITE5	10	30 Sep 2021	CIRCE BELIT
D2.7 – BEYOND Framework Architecture including functional, technical and communication specifications - b	SUITE5	22	30 Sep 2022	CIRCE BELIT
D3.1 – EEB Data Models Review Semantic Alignment and Further Enhancement Needs	KONCAR	6	31 May 2021	FVH SUITE5
D3.2 – BEYOND Common Information Model	SUITE5	10	30 Sep 2021	UBI VTT
D3.3 – Data Collection, Security, Storage, Governance & Management Services Bundles – Beta Release	SUITE5	14	31 Jan 2022	IGM ARTELYS
D3.4 – BEYOND Integrated Platform – Alpha, Mock-ups Release	SUITE5	14	31 Jan 2022	UBITECH ARTELYS
D3.5 – BEYOND Integrated Platform & Open APIs – Beta Release	SUITE5	16	31 Mar 2022	UBITECH IGM
D3.6 – Data Collection, Security, Storage, Governance & Management Services Bundles – Release 1.00	SUITE5	18	31 May 2022	UBITECH IGM
D3.7 – BEYOND Integrated Platform & Open APIs – Release 1.00	SUITE5	20	31 Jul 2022	CIRCE BELIT
D3.8 – BEYOND Integrated Platform & Open APIs – Release 2.00	SUITE5	32	31 Jul 2023	CIRECE BELIT
D4.1 – BEYOND Data Analytics, Sharing & Matchmaking Services Bundles – Beta Release	SUITE5	14	31 Jan 2022	UBITECH KONCAR
D4.2 – BEYOND Baseline Data Analytics – Draft Release	SUITE5	16	31 Mar 2022	UBITECH KONCAR
D4.3 – BEYOND Data Analytics, Sharing & Matchmaking Services Bundles – Release 1.00	SUITE5	18	31 May 2022	UBITECH ARTELYS
D4.4 – BEYOND AI Data Analytics Toolkit – Final Release	SUITE5	34	30 Sep 2023	UBITECH URBENER



Deliverable	Lead Benef.	Due M	Due Date	Assigned Reviewers
D5.1 – Impact Assessment Tool for Energy Policy Making at urban level	ARTELYS	20	31 Jul 2022	VTT CIRCE
D5.2 – District Heating Network Planning and Infrastructure Sizing Tool	ARTELYS	20	31 Jul 2022	VTT BEOELEK
D5.3 – Distribution Grid Planning and Infrastructure Sizing Tool	CIRCE	20	31 Jul 2022	FVH CUERVA
D5.4 – Renovation Optimization Decision Support Tool	VTT	20	31 Jul 2022	CIRCE IGM
D5.5 – Final Version of the tools of the Decision Support Suite for Optimizing Energy Policy Planning, Infrastructure Sizing and De-risking Renovation Investments	ARTELYS	36	30 Nov 2023	UBITECH SUITE5
D6.1 – Building Digital Twins Environment for Energy Performance Optimization, Self-consumption Maximization and Predictive Maintenance	VTT	20	31 Jul 2022	CIRCE KONCAR
D6.2 – Building Portfolio Management Optimization Tool	UBITECH	20	31 Jul 2022	VTT MYTILINEOS
D6.3 – Personalized Energy Analytics Tool for Guidance on Energy Performance Optimization and Human-Centric Control Automation	SUITE5	20	31 Jul 2022	CIRCE BEOELEK
D6.4 – Energy Performance and Smart Readiness Certification Tool	BELIT	20	31 Jul 2022	UBITECH FVH
D6.5 – Flexibility-based VPP Configurator and DR Strategies Optimization Tool	KONCAR	20	31 Jul 2022	UBITECH SUITE5
D6.6 – Final versions of the tools of the Innovative Energy Services Suite towards Optimized Buildings Energy Performance Management	VTT	36	30 Nov 2023	FVH MYTILINEOS
D7.1 – BEYOND Pre-trial validation testing results	IGM	22	30 Sep 2022	KONCAR URBENER
D7.2 – Detailed Demonstration Activities Management Plan	MYTILINEOS	16	31 Mar 2022	UBITECH CUERVA
D7.3 – Report on BEYOND Deployment	MYTILINEOS	22	30 Sep 2022	UBITECH SUITE5



Deliverable	Lead Benef.	Due M	Due Date	Assigned Reviewers
D7.4 – BEYOND Evaluation Framework and Respective Validation Scenarios	CIRCE	18	31 May 2022	FVH SUITE5
D7.5 – BEYOND Holistic Performance Evaluation, Impact Assessment and Cost-Benefit Analysis - a	CIRCE	30	31 May 2023	VTT URBENER
D7.6 – BEYOND Holistic Performance Evaluation, Impact Assessment and Cost-Benefit Analysis - b	CIRCE	36	30 Nov 2023	VTT URBENER
D7.7 – BEYOND Replication Roadmap	CIRCE	36	30 Nov 2023	FVH KONCAR
D8.1 – BEYOND Living Lab Activities Plan and Evaluation Report - a	UBITECH	3	28 Feb 2021	SUITE5 MYTILINEOS
D8.2 – BEYOND Living Lab Activities Plan and Evaluation Report – b	UBITECH	12	30 Nov 2021	SUITE5
D8.3 – BEYOND Living Lab Activities Plan and Evaluation Report - c	UBITECH	24	30 Nov 2022	MYTILINEOS
D8.4 – BEYOND Living Lab Activities Plan and Evaluation Report - d	UBITECH	30	31 May 2023	SUITE5
D8.5 – BEYOND Branding, Website and Social Media Channels	UBITECH	3	28 Feb 2021	IGM BEOELEK
D8.6 – BEYOND Dissemination and Communication Plan and Associated Material - a	UBITECH	3	28 Feb 2021	IGM URBENER
D8.7 – BEYOND Dissemination and Communication Plan and Associated Material – b	UBITECH	12	30 Nov 2021	IGM URBENER
D8.8 – BEYOND Dissemination and Communication Plan and Associated Material – c	UBITECH	24	30 Nov 2022	IGM URBENER
D8.9 – BEYOND Dissemination and Communication Plan and Associated Material – d	UBITECH	36	30 Nov 2023	IGM URBENER
D8.10 – Report and Evaluation of Collaborative Activities with Relevant Projects and Contractors - a	UBITECH	3	28 Feb 2021	SUITE5 CUERVA
D8.11 – Report and Evaluation of Collaborative Activities with Relevant Projects and Contractors – b	UBITECH	12	30 Nov 2021	SUITE5 CUERVA
D8.12 – Report and Evaluation of Collaborative Activities with Relevant Projects and Contractors - c	UBITECH	24	30 Nov 2022	SUITE5 CUERVA



Deliverable	Lead Benef.	Due M	Due Date	Assigned Reviewers
D8.13 – Report and Evaluation of Collaborative Activities with Relevant Projects and Contractors - d	UBITECH	36	30 Nov 2023	SUITE5 CUERVA
D8.14 – Definition of novel data-driven Business Models for the Buildings and Energy domains - a	UBITECH	6	31 May 2021	SUITE5 URBENER
D8.15 – Definition of novel data-driven Business Models for the Buildings and Energy domains - b	UBITECH	33	31 Aug 2023	SUITE5 URBENER
D8.16 – BEYOND Overall Exploitation Strategy and Individual Exploitation Plans	SUITE5	30	31 May 2023	BELIT BEOELEK
D8.17 – BEYOND Joint Venture Business Innovation Plan	SUITE5	36	30 Nov 2023	UBITECH CUERVA
D8.18 – Policy and market reform recommendations report	CIRCE	30	31 May 2023	VTT CUERVA
D8.19 – Report on activities for the promotion of BEYOND standardization punch-list - a	KONCAR	28	31 Mar 2023	FVH CONCAR
D8.20 – Report on activities for the promotion of BEYOND standardization punch-list – b	KONCAR	36	30 Nov 2023	FVH KONCAR
POPD - Requirement No. 2	UBITECH	6	31 May 2021	FVH BEOLEK
POPD - Requirement No. 3	UBITECH	6	31 May 2021	CIRCE CUERVA

4.2 Document Control Management

The Document Control Management deals with the preparation of template documents, the identification and the tracking of changes related to draft and final versions of documents circulated among the partners.

The Project Coordinator is responsible for the necessary assessment of deliverables, while the Quality Manager will be responsible for the overall monitoring of the entire document control and configuration management activities described in this section.

4.2.1 Documentation Requirements

In the span of the BEYOND project, a set of deliverables and relevant documented results are anticipated as depicted in the following table. Such documents will be sent



by e-mail and be uploaded in the restricted BEYOND document repository, as long as they comply with the following standards:

- Word Processor: Microsoft Word 2007 and higher,
- Spreadsheet: Microsoft Excel 2007 and higher,
- Presentations: Microsoft PowerPoint 2007 and higher.

All files should be scanned for potential viruses before issue and screened on receipt. If an acknowledgement is requested, an explicit request should be included by the sender at the top of the message (e-mail, fax, etc.)

TABLE 4: TYPES OF FILES

Type	Responsible	Template
Deliverable submitted to the EC	As per DoA	Deliverable Document Template
Internal Project Presentation	All partners	Project Presentation Template
Meeting Agenda	Project Coordinator	Meeting Agenda Template
Meeting Minutes	Project Coordinator & Technical Coordinator	Meeting Minutes Template
Reviewed Document	All partners	A new version with track changes on the original version
Internal Review Report	All partners	Internal Review Report Template
Final Activity Report	Project Coordinator / WP Leaders	As per Grant Agreement and Commission guidelines
Final Management Report	Project Coordinator	As per Grant Agreement and Commission guidelines
Financial Statement	All Partners	As per Grant Agreement and Commission guidelines
Consolidated Financial Statement	Financial Administrator	As per Grant Agreement and Commission guidelines

4.2.2 Naming Conventions and Versioning

Document configuration management will be ensured through tracking the versions and the history of changes within the various project documents, such as:

- Deliverables (as stated in the deliverables list in the DoA);
- Presentations of the project results;
- Meeting agenda and minutes; and



D1.1 - Project handbook

- Internal audit reports and reviewed deliverables, including the corrective actions taken.

Document versioning will be tracked in each deliverable in a separate table describing the different versions of the document and the reasons of change/updates on it.

4.2.3 Deliverables submitted to the EC

Name	BEYOND_[Deliverable Code]-[Deliverable Title]-vA.BB
(Draft)	BEYOND_[Deliverable Code]-[Deliverable Title]_[Partner]-vA.BB
Where	A: Major version of the deliverable (Submission to Commission)
	BB: Minor version of the deliverable for updates during the preparation phase
Examples	BEYOND_D2.1-Project Management Handbook-v1.00 (<i>for submission to the Commission</i>)
	BEYOND_D2.1-Project Management Handbook_UBITECH-v0.30 (<i>for internal updates and submission for internal review</i>)

4.2.4 Internal Project Presentations

Name	BEYOND-[Purpose] or [WP Number]_[Partner]-vA.BB
Where	A: Major version of the presentation (Presentation in the event / workshop)
	BB: Minor version of the presentation for updates during the preparation phase
Examples	BEYOND_WP4_UBITECH-v1.00

4.2.5 Meeting Agenda

Name	BEYOND_[Meeting Number] Meeting_Agenda_[Place]-vA.BB
Where	A: Major version of the meeting agenda
	BB: Minor version of the meeting agenda for updates during the preparation phase
	Place: Venue city
Examples	BEYOND_KOM Agenda_Athens-v1.00 (<i>final version</i>)
	BEYOND_KOM Agenda_Athens-v0.10 (<i>for internal updates and submission for internal review</i>)

4.2.6 Meeting Minutes

Name	BEYOND_[Meeting Number] Meeting_Minutes_[Place]-vA.BB
where	A: Major version of the meeting minutes
	BB: Minor version of the meeting minutes for updates during the preparation phase
	Place: Venue city
Examples	BEYOND_KOM Minutes_Athens-v1.00 (<i>final version</i>)



BEYOND_KOM Minutes_Athens-v0.10 (for internal updates and submission for internal review)

4.2.7 Reviewed Documents and Internal Audit Reports

Name	BEYOND_[Deliverable Code]-[TR/QR]_[Partner / Expert]-vA.BB
	BEYOND_[Deliverable Code]-[TR/QR]_[Partner / Expert]-vA.BB-Internal Audit
where	A: Major version of the deliverable / internal audit report
	BB: Minor version of the deliverable / internal audit report for updates during the preparation phase
	TR: Technical Reviewed document
	QR: Quality Reviewed document
Examples	BEYOND_D8.1-TR_UBITECH-v0.31 (Technical Reviewed Document from UBITECH)
	BEYOND_D8.1-TR_UBITECH -v0.31-Internal Audit (Review report from UBITECH)
	BEYOND_D8.1-QR_UBITECH -v0.41 (Quality Reviewed Document from UBITECH)

4.2.8 Security Levels

Circulation of Deliverables, Internal Deliverables and Working Documents, inside and outside the BEYOND Consortium, is subject to the rules associated to the following security levels:

TABLE 5: DELIVERABLE SECURITY LEVELS

Type	Responsible	Template
PU	Public	Free circulation inside and outside the Consortium
PP	Restricted to other programme participants.	Free circulation in the community of H2020 participants
RE	Restricted to a group specified by the consortium.	An accompanying circulation list specifies the organizations having access to the document
CO	Confidential	Circulation is limited to members of the consortium, the Commission Staff and the Reviewers

As a general rule, the European Commission Services have free access to all the Deliverables and Internal Deliverables produced by the Project.

4.2.9 Code of Conduct

BEYOND partners are expected to jointly develop new ideas, concepts, and architectures, as well as to pursue, jointly or individually, relevant opportunities for



dissemination and exploitation of the project results. Therefore, in order to guarantee open and frank collaboration among the consortium members, namely when this involves original contributions and information subject to some level of confidentiality, the following principles shall be observed:

- The partners shall comply to the rules set by Annex II to the Contract (General Conditions) and by the BEYOND Consortium Agreement, in relation to:
 - The Intellectual Property Rights (IPR), regarding any original contribution or background knowledge brought in by any member; and
 - The IPR regarding any new knowledge (forward knowledge) generated in the framework of BEYOND as a result of any cooperative activity.
- In all forms of use of the mentioned knowledge, proper recognition to all original contributors should be made, namely through:
 - Proper references in publications. When the referenced piece of knowledge has been published, standard referencing rules should apply. In case of draft ideas included in working documents, a reference to the author and corresponding document should be made; and
 - Otherwise, in the case that there is no written reference, a note stating: "personal communication in the framework of the BEYOND project" can be used (identifying the contributor).
- Similar rules should be observed when using copies of slides that include substantial original ideas (figures or text).
- When reporting RTD results, Deliverables and Working Documents will contain a list of the contributing partners, intended as physical persons of the involved organizations who have provided contributions to the document.

4.3 Quality Records Management

A record is defined in ISO 9000 as a document stating results achieved or providing evidence of activities performed. In this context, in BEYOND, the quality records refer to project documentation (deliverables, presentations, etc.) along with the Internal Review Reports, corresponding to each deliverable.

Records will be filled in a readily retrievable manner for the minimum period specified under the BEYOND Grant Agreement and will be kept in a suitable environment to minimize damage.

The Quality Manager is held responsible for maintaining the quality records while the Project Coordinator shall make them available to the European Commission, if necessary.



4.4 Quality Assurance Metrics

Monitoring of the project quality throughout the project lifecycle will be done through metrics associated to the documentation quality, as indicated in the following section.

Metric ID	Description	Target
DM#1	No. of inconsistencies according to the deliverable template (format, layout, spelling, etc.)	0
DM#2	No. of legibility issues in text, figures or tables	0
DM#3	Percentage of correspondence to project objectives	100%
DM#4	Max delay days in the internal submission of documents for review (according to the timetable provided in the document review procedure)	3
DM#5	Percentage of technical and quality comments addressed (from the internal review)	95%
DM#6	Maximum number of quality review rounds	1
DM#7	Maximum number of technical review rounds	2
DM#8	Delays in the submission to the Commission of the deliverables according to the timetable at the Description of Action.	0

4.5 EU emblem utilization

Any dissemination of results must display the EU emblem; thus, the BEYOND logo will be present on all materials related to communication, together with the EU emblem, a direct statement on the funding source and the Grant Agreement number.



This project has received funding from the European Union's Horizon 2020 Research and Innovation programme under Grant Agreement n°957020.

FIGURE 3: STANDARD FUNDING SOURCE NON-DISCLOSURE TEXT AND EUROPEAN EMBLEM



5. Communication among partners

In order to properly implement the project plan and to produce added value results, the processes needed for the quality management purposes and their application across the project lifecycle will be identified and analyzed in this section.

5.1 Meetings and Workshops

Regular and ad-hoc meetings will be held during the project lifecycle, including:

- **Project Plenary Meetings** held at least every 2 per year (every 6 months) in order to ensure that all procedures are understood and implemented in the proper way.

The Project Coordinator is responsible for the meeting formation (agenda of the meeting) and the communication of the meeting details (time, place) at least 3 weeks before the date of the meeting, in order to allow time to the participants for the scheduling and preparation of the necessary information for the meeting.

Technical Partners Meetings held per case if required. Those meetings will be organised by the Technical Coordinator.

- **Regular Conference Calls, Plenary Calls** are held on a bi-weekly basis.
Proposed Date: every other Friday Time: 11.00 CET.
- **Online Work Package Meetings** held according to the workload and performed through the teleconferencing facilities of the project.
Each WP leader will propose the meeting schedule according to his WP needs at least 1 week before the date of the meeting and coordinate the necessary actions among the involved partners for the implementation of the WP activities. Each WP leader will communicate the final agenda of the meeting at least 1 day before the meeting date.

Regular or ad-hoc conference calls related to specific work packages will be requested by Work package Leaders. The Coordinator will host the Plenary Meetings by GoToMeeting environment (<https://www.gotomeet.me/ubitech>).

A tentative table of the project meetings is available below.

TABLE 6: TENTATIVE LIST OF PLENARY MEETINGS

No.	Tentative Dates	Venue	Host
1st Plenary Meeting - Kick Off Meeting	9-10 December 2020	online	UBITECH
2nd Plenary Meeting	8 & 10 June 2021	online	UBITECH



No.	Tentative Dates	Venue	Host
3rd Plenary Meeting	Nov -Dec 2021	TBD	TBD
4th Plenary Meeting	May-June 2022	TBD	TBD
5th Plenary Meeting	Nov -Dec 2022	TBD	TBD
6th Plenary Meeting	May-June 2023	TBD	TBD

Following up on a physical project meeting, the decided meeting minutes will be compiled within 15 calendar days of the meeting based on the Meeting Minutes Template provided will be the formal record of all the decisions taken. The minutes will be considered as accepted if, within 15 calendar days upon sending them, no partner has declared any written objections to the Project Coordinator with respect to the accuracy of the draft version of the minutes.

The next meeting locations and exact dates will be decided in project meetings or scheduled with the help of Doodle polls. The Project Coordinator is responsible for setting up the poll, send the link to partners and decide for the final dates. Ad-hoc meetings may be organised in case of an emergency or a conflict resolution.

Due to COVID-19 outburst the Kick of meeting was held on line, due to travel restrictions. Also, the 2nd Plenary meeting is planning to be held online since the COVID-19 situation is still ongoing. The next meetings will be organized according to the current situation at that period.

5.2 Mailing Lists

Effective channels of internal communication have been established from M1 in order to exchange all the necessary information for the project implementation, such as deliverables and relevant documentation. Internal communication channels are also used for exchanging meeting minutes and progress reports, ensuring a common understanding among all partners regarding the required achievements during the lifetime of the project as well as the procedures that have to be followed for fulfilling them.

A set of e-mail distribution lists have been created to facilitate the communication flows within the different bodies of the consortium. The active mailing lists are shown in Table below .

TABLE 7: BEYOND MAILING LISTS

Mailing List	Description
general@beyond-h2020.eu	Utilized for announcements to all participants in the consortium and exchanged for administrative and financial issues

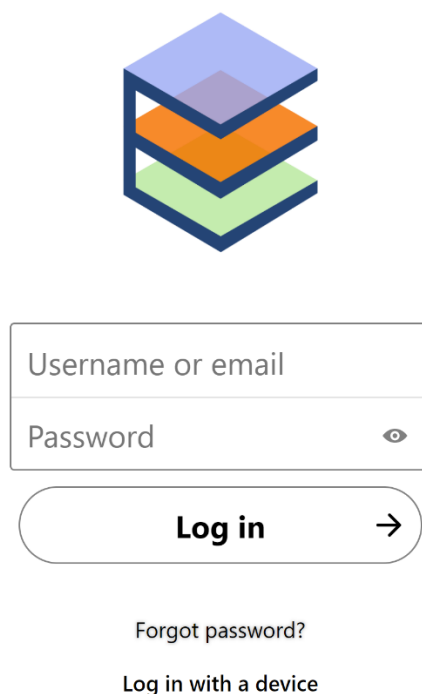


technical@beyond-h2020.eu	Utilized for communication on technical work and issues during the project execution
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Subscription of each project member to a specific mailing list is managed and maintained by the Project Coordinator. The updated subscription list is available through the BEYOND Project Repository. Each consortium partner is responsible to inform the Project Coordinator whether any modification of their representatives is needed, and the Project Coordinator will be responsible for keeping the distribution lists updated and informing the rest of members.

5.3 Project collaborative space – Infrastructure and Repository

UBITECH deployed and will operate the internal Documents and Electronic Material Repository in the following URL: <https://repository.beyond-h2020.eu>



BEYOND Repository – a safe home for all your data

FIGURE 4: BEYOND REPOSITORY LOGIN PAGE

UBITECH has distributed the Repository User Accounts to the partners.

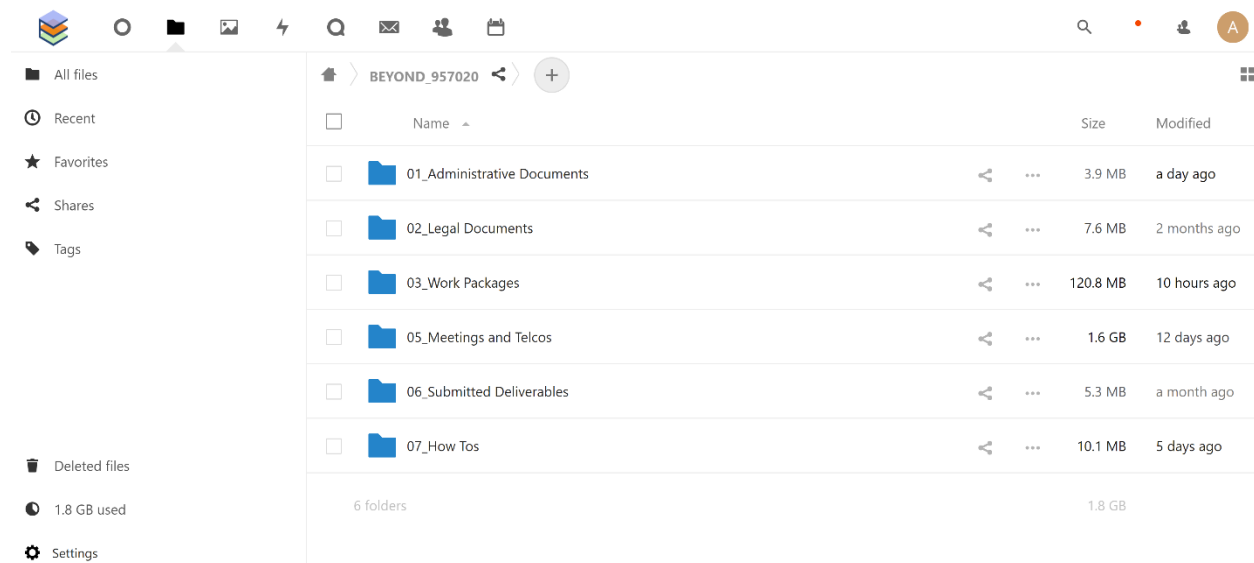


FIGURE 5: BEYOND REPO FOLDERS STRUCTURE

A brief summary of the documentation organization and content of the BEYOND Project Repository with respect to the Document Management System:

- 01 - Administrative Documents – it contains the created documents' templates to be utilized, as well participants' contacts details and reporting folder.
- 02 - Legal Documents: Contractual documents, containing the Grant Agreement with EC and its annexes and the Consortium Agreement with its annexes. Moreover, it encloses a financial reporting folder is created where all financial related documents will be stored for the BEYOND reporting periods
- 03 – Work Packages: A folder per Work package is created. In each WP folder, separate folders per Deliverable are also created. In each Deliverable folder, the consortium will store the material files required, the various contributions, the deliverable's editing versions, the review reports, as well as the final draft and the submitted deliverable to the EC.
- 04 – Meeting and Telcos: The specific folder contains the files that refer to Meetings Agendas, Meetings Minutes, as well as Meetings Partners Presentations. Furthermore, it contains the folder structure to support the storage of all Teleconferences Presentations and Minutes describing the decisions made and action plans produced.
- 05 - Submitted Deliverables: The specific folder contains the list of the PDF files of the deliverables as these will be officially uploaded to ECAS System.



D1.1 - Project handbook

- 06 - How Tos: it contains the User Guide for BEYOND repository. Furthermore, it will contain any other How-To's or Manuals that will be produced in the frame of the project.



6. Management of Knowledge and Intellectual Property

Knowledge and intellectual property issues will be addressed in compliance to H2020 contract template / contractual conditions. Such issues include ownership and protection of knowledge, dissemination of knowledge, access rights, etc. as described in the Consortium Agreement that is dully signed by all partners.

The Steering Committee will be in charge of monitoring the proper implementation of the conditions specified in the Contract and the Consortium Agreement. Further details are provided in D1.3 - Ethics monitoring report.

