



# MOTIVATEXR

Maintenance, Support & Operation Training using Immersive Virtual and Augmented Technology for Efficiency with XR

## D1.1 PROJECT AND S&T MANAGEMENT PLAN

30/08/2024



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## D1.1 PROJECT AND S&T MANAGEMENT PLAN

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Version	1
Authors	Nikos Achilleopoulos, Eriphyle Baloti (MAG)
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Abstract	Roadmap for all project administrative management activities, including communication channels established, quality procedures and IPR management principles
Keywords	

### Document Revision History

Version	Date	Description of change	List of contributor(s)
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0.2	09/08/24	Draft on Share Added chapter 4.4.1	Nikos Achilleopoulos
1	02/09/2024	Finalized after review	Nikos Achilleopoulos

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The Consortium is the following:

Participant number	Short Name	Participant organisation	Country
1	MAG	Maggioli	Italy
2	CS	CS Group-France	France
4	SOP	Sopra Steria Group	France
5	F6S	F6S Network Ireland Limited	Ireland
6	YBQ	YOUBIQUO SRL	Italy
7	D3	D-CUBE	Greece
8	2F	2Freedom Imaging Software and Hardware SL	Spain
9	CETMA	Centro Di Ricerche Europeo Di Tecnologie Design E Materiali	Italy
10	UPM	Universidad Politecnica De Madrid	Spain
11	TUD	Technische Universiteit Delft	Netherlands
12	TEC	Fundacion Tecnalía Research & Innovation	Spain
13	HGE	Hisense Gorenje Europe Poslovne Storitve DOO	Slovenia
14	AV	Aerospace Valley	France
15	AAA	Building Systems Innovation Centre (Architectural Aluminium Academy)	Greece
16	BIR	Bi-Rex - Big Data Innovation Research Excellence	Italy
17	HEDNO	Hellenic Electricity Distribution Network Operator	Greece
18	AC	Aerocampus Aquitaine	France

## EXECUTIVE SUMMARY

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The main goal of the document is to act as a compilation of all the management procedures in the scope of the MOTIVATE XR project to be provided to all participants. It presents and describes the procedures and guidelines to manage the project efficiently and successfully.

The deliverable provides an overview of the scope, partners, project resources as well as its planning along the full lifecycle of the project. To ensure a proper progress control of the project, reporting and monitoring procedures are described. The project governance structure and its bodies, as well as the communication management plan are also detailed. Finally, in addition to the definition of the Quality and Risk Management plans, tools are provided to ensure the requested quality level of the project results and to monitor and control risks.

MOTIVATE XR aims to develop a leading XR tool suite for training and assisting in industrial operations like assembly, manufacturing, maintenance, and dismantling. This innovative, open, and highly interoperable solution is designed for users without programming skills, from large European industries to individual handypersons. It offers an end-to-end workflow solution for authors and participants (e.g., trainees, instructors, workers, technicians, DIY enthusiasts) with advanced 3D scanning, digital twin modeling, No-Code authoring, and XR experiencing tools, including a next-gen European XR smart headset, all powered by AI.

The project will be tested in five diverse industrial sectors: aerospace, home appliances, aluminum, electric distribution, and hybrid human-robot industries. A user-centric methodology, guided by an SSH expert, will ensure adherence to societal, ethical, and legal standards, including the "Do no significant harm" (DNSH) principles and ethical use of XR and AI per EC guidelines.

MOTIVATE XR aims to boost the competitiveness, productivity, and efficiency of European XR content producers for industrial applications, enhancing industry resilience by enabling better training and support for less-skilled personnel with multilingual XR assistance. Additionally, it will empower the home appliance industry to provide XR experiences for assembling and self-repairing appliances, reducing waste and creating new job opportunities.

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## ABBREVIATIONS

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CA	Consortium Agreement
DL	Deliverable Leader
DoA	Description of Action
DT	Deliverable Team
EC	European Commission
F2F	Face -to-Face
FSIGN	Project Financial Signatory
CA	Consortium Agreement
GA	Grant Agreement
IAR	Internal (Interim) Activity Report
KPI	Key Performance Indicator
PC	Project Coordinator
PM	Person Month
PMB	Project Management Board
PR	Peer Reviewer
QM	Quality Manager
RAM	Risk Assessment Matrix
RP	Report
TL	Task Level
ToC	Table of Contents
WP	Work Package
WPL	Work Package Level
GDPR	General Data Protection Regulation

## 1 INTRODUCTION

### 1.1 PURPOSE OF THE DOCUMENT

---

The present document is the Project Handbook for the project MOTIVATE XR. This document has two main goals: first it defines common management procedures for the internal management of the project, such as the consortium governance, project monitoring and project reporting; and second it defines the quality plan and the risk management plan for the project.

The procedures for the internal management of the project are aligned with the approved documents by the consortium and the European Commission (EC), namely the Consortium Agreement (CA) and the Grant Agreement (GA)

The quality and risk management plan defined in this document aims at ensuring that the quality expected by the EC on the results of the project are achieved, whereas any risks are identified in advance and appropriately mitigated if it is required so.

The management procedures that are here described in this document follow the methodology defined and applied in Horizon Europe projects and has been adapted to the characteristics of MOTIVATE XR.

### 1.2 STRUCTURE

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This document is divided into the following main sections:

- Chapter 2 and 3 describe the project at a high level, including its workplan and resources planned.
- Chapter 4 - Project Management: It describes the management procedures to be followed in this project to achieve both the technical and administrative objectives.
- Chapter 5 - Quality Assurance describes basic procedure for Quality assurance on produced deliverables

## 2 PROJECT OVERVIEW

Project acronym	MOTIVATE XR
Project title	Maintenance, Support & Operation Training using Immersive Virtual and Augmented Technology for Efficiency with XR
Project type	IA
Call	HORIZON-CL4-2023-HUMAN-01-CNECT
Topic	HORIZON-CL4-2023-HUMAN-01-22 - eXtended Reality for Industry 5.0 (IA)
Contract	NUMBER 101135963 – MOTIVATE XR <i>AMD-101135963-2 Consortium Requested Amendment effective since 06 June 2024</i>
Project start date	01/06/2024
Estimated end date	31/05/2027
Estimated total time	36 Months
Total costs (Annex 2)	7,378,970.50 €
Maximum grant amount	5,993,041.75 €
Estimated effort	1028.5 PM
CORDIS fiche	<a href="https://cordis.europa.eu/project/id/101135963">https://cordis.europa.eu/project/id/101135963</a>

### 2.1 PROJECT SUMMARY

Extended Reality (XR) is set to revolutionize learning, training, and work by enabling global access to knowledge and enhanced experiences beyond physical limitations. XR has the potential to transform industries such as manufacturing, education, and commerce by making training and complex industrial tasks more engaging, safer, and accessible. This addresses the skill gap highlighted by the European Commission in its "Pact for Skills" initiative.

To avoid repeating past technological dependencies seen with the Web 2.0 revolution, Europe must proactively develop its own XR solutions. The demand for user-friendly XR tools is rising across

European industries for training and on-site support. MOTIVATE XR aims to meet this demand with an intuitive and cost-effective European XR solution for industrial operations.

MOTIVATE XR aims to develop a leading XR tool suite for training and assisting in industrial operations like assembly, manufacturing, maintenance, and dismantling. This innovative, open, and highly interoperable solution is designed for users without programming skills, from large European industries to individual handypersons. It will provide an end-to-end workflow solution with advanced 3D scanning, digital twin modeling, No-Code authoring, and XR experiencing tools, including a next-gen European XR smart headset, all powered by AI.

The project will be tested in five diverse industrial sectors: aerospace, home appliances, aluminum, electric distribution, and hybrid human-robot industries. A user-centric methodology, guided by an SSH expert, will ensure adherence to societal, ethical, and legal standards, including the "Do no significant harm" (DNSH) principles and ethical use of XR and AI per EC guidelines. Specifically, the Motivate XR solution will include:

1. User-Centric Co-Design Methodology.
2. AI-Driven Conversion of Technical Documentation.
3. No-Code Collaborative Authoring Tool set.
4. XR Experiencing Tools for Training and Assistance.
5. Cybersecure Backend Integration.
6. Industrial Pilots and User Training.
7. Maximizing Impact and Market Entry.

## 2.2 PROJECT MANAGEMENT PLAN

### 2.2.1 WORK PACKAGE LISTS

WP No	Work Package Title	Lead Participant No	Lead Participant Short Name	Person-Months	Start Month	End month
1	Project Management and Coordination	1	MAG	67.5	1	36
2	Impact Maximisation and Outreach	5	F6S	120	1	36
3	SSH and Industrial Frameworks & Co-design	9	CETMA	169	1	20
4	MOTIVATE XR Authoring Tools	2	CS	184	3	30
5	MOTIVATE XR Experiencing Tools	12	TEC	123	3	30
6	MOTIVATE XR Continuous Integration and Verification	1	MAG	94	3	32
7	Training, Pilots, and Evaluation	6	YBQ	271	13	36

Table 1 WORK PACKAGE LIST

### 2.2.2 DELIVERABLES

Del. #	Deliverable name	WP #	Leading partner	Type	Diss. Level	Delivery Date
D1.1	Project and S&T Management Plan	1	MAG	R	PU	3
D1.2	IPR and Data Management Plan	1	MAG	DMP	SEN	6
D1.3	IPR and Data Management Plan v2	1	MAG	DMP	SEN	18
D1.4	IPR and Data Management Plan v3	1	MAG	DMP	SEN	36
D1.5	Interim Progress Report	1	MAG	R	SEN	18
D1.6	Final Progress Report	1	MAG	R	SEN	36
D2.1	Communication kit v1	2	F6S	DEC	PU	4

Del. #	Deliverable name	WP #	Leading partner	Type	Diss. Level	Delivery Date
D2.2	Communication Kit v2	2	F6S	DEC	PU	18
D2.3	Communication Kit v3	2	F6S	DEC	PU	34
D2.4	Business Model	2	MAG	R	SEN	6
D2.5	Business Model v2	2	MAG	R	SEN	20
D2.6	Business Model v3	2	MAG	R	SEN	35
D2.7	MOTIVATE XR Workshops	2	TUD	R	PU	18
D2.8	MOTIVATE XR Workshops v2	2	TUD	R	PU	36
D2.9	Dissemination and Exploitation Plan	2	F6S	R	SEN	6
D2.10	Dissemination and Exploitation Plan v2	2	F6S	R	SEN	12
D2.11	Dissemination and Exploitation Plan v3	2	F6S	R	SEN	24
D2.12	Dissemination and Exploitation Plan v4	2	F6S	R	SEN	36
D3.1	SSH Framework	3	TUD	R	PU	4
D3.2	SSH Framework v2	3	TUD	R	PU	19
D3.3	Industrial User Requirements and Use-Case Scenarios	3	CETMA	R	PU	4
D3.4	Industrial User Requirements and Use-Case Scenarios v2	3	CETMA	R	PU	19
D3.5	Functional Specifications & Cybersecure Architecture	3	CS	R	SEN	6
D3.6	Functional Specifications v2 & Cybersecure Architecture	3	CS	R	SEN	20
D3.7	UX Co-Design Report	3	CETMA	R	SEN	6

Del. #	Deliverable name	WP #	Leading partner	Type	Diss. Level	Delivery Date
D3.8	UX Co-Design Report v2	3	CETMA	R	SEN	20
D4.1	Authoring tools beta	4	CS	R	SEN	13
D4.2	Authoring tools final	4	CS	R	SEN	30
D5.1	Experiencing tools beta	5	TEC	R	SEN	13
D5.2	Experiencing tools final	5	TEC	R	SEN	30
D6.1	Continuous integration plan and platform	6	UPM	OTHER	PU	6
D6.2	Continuous integration plan and platform v2	6	UPM	OTHER	PU	20
D6.3	MOTIVATE XR Integrated Release v1	6	MAG	OTHER	PU	16
D6.4	MOTIVATE XR Integrated Release v2	6	MAG	OTHER	PU	32
D7.1	Innovative Training Curriculum and Training Activities Report	7	YBQ	R	PU	15
D7.2	Innovative Training Curriculum and Training Activities Report v2	7	YBQ	R	PU	32
D7.3	Pilot Activities and Evaluation Report	7	TUD	R	PU	18
D7.4	Pilot Activities and Evaluation Report v2	7	TUD	R	PU	35

TABLE 2 DELIVERABLES LIST

### 2.2.3 MILESTONES

Milestone #	Milestone name	Related WPs	Due date	Means of verification	Lead Beneficiary
MS1	Initial frameworks and design	WP1, WP2, WP3	M6	<ul style="list-style-type: none"> <li>- Management structure and plan are operational.</li> <li>- MOTIVATE XR Advisory Board is initiated/formed, and Open Community is launched.</li> <li>- Website and social network pages, along with first version of dissemination and use plans and communication material are developed.</li> </ul> <p>Initial frameworks including SEL issues, user requirements, Pilot scenarios have been prepared.</p> <ul style="list-style-type: none"> <li>- Initial design document defining function specifications, architecture, and UX design is available.</li> </ul>	MAG
MS2	Beta release	WP6, WP7	M16	<p>Beta release components have been developed and integrated in WP6. All end-users have purchased and installed the necessary equipment for the beta pilots. All material and data required to implement the beta release pilots are available to WP7. Training, beta pilots and evaluation can start.</p>	MAG
MS3	Training & beta evaluation	WP6, WP7	M18	<p>Users have been trained to operate the beta release. Beta pilots have successfully implemented with minimal assistance from the technical partners. Beta release has been evaluated in terms of performance, usability, security, safety, and SEL impacts. Evaluation results are available to refine project frameworks in WP3.</p>	YBQ
MS4	Final frameworks and system design	WP6, WP7	M20	<p>Final framework reports have been refined according to the results of the beta release evaluation. Final functional specifications have been delivered. Final design (architecture and UX) has been delivered. Final evaluation methodology, training</p>	UPM

Milestone #	Milestone name	Related WPs	Due date	Means of verification	Lead Beneficiary
				curriculum & pilot plans have been finalised in WP7.	
MS5	Final Release	WP4, WP5, WP6, WP7	M32	Final release components have been developed and integrated in WP6. All end-users have purchased and installed the equipment for the final pilots. All material and data required to implement the final release pilots are available. Training, final pilots, and evaluation can start.	CS
MS6	End of training & final evaluation	WP6, WP7	M36	Users have been trained to operate the final release. Final pilots have been successfully implemented by the end-users without assistance from the technical partners. MOTIVATE XR final release has been positively evaluated by the end-users in terms of performance, usability, security, safety, and SEL impacts. Evaluation results and pilots are available to refine frameworks as well as lessons learnt and recommendation that will be important knowledge for practitioners and material to promote the future product.	MAG

TABLE 3 PROJECT MILESTONES

## 2.2.4 GANTT CHART

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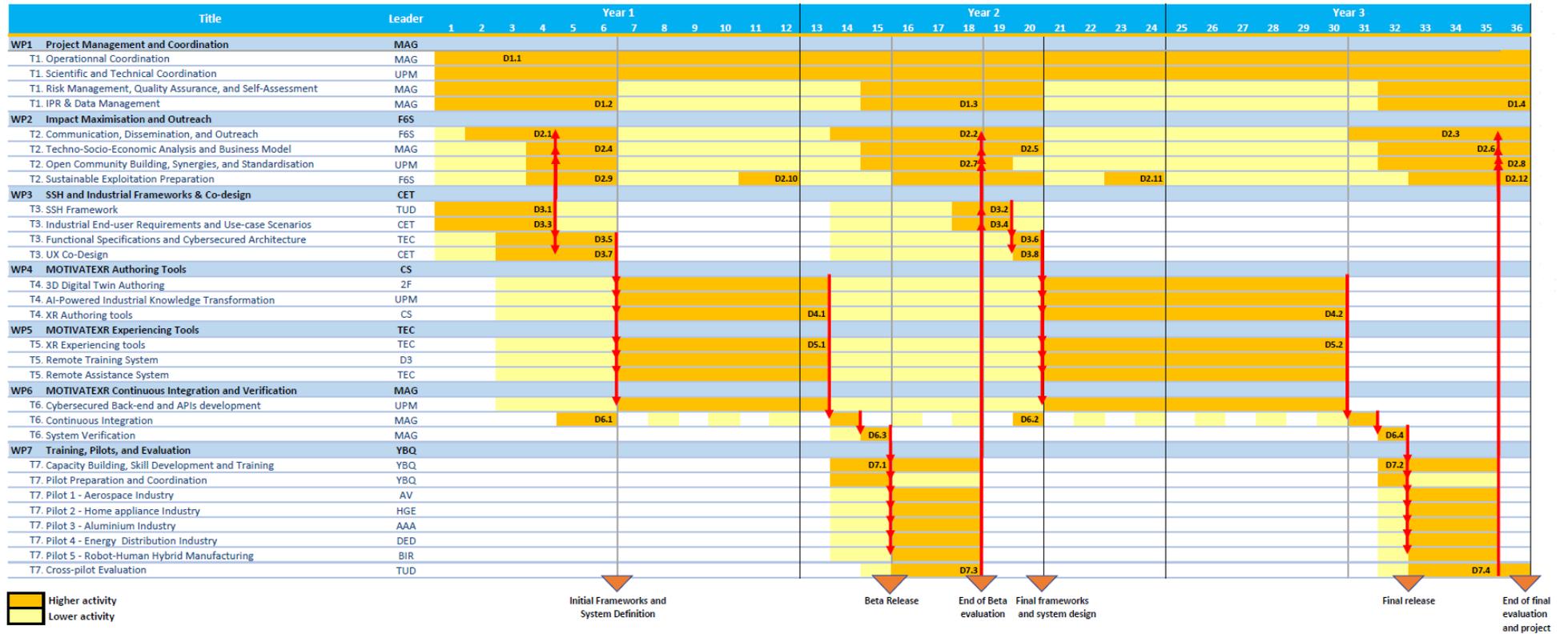


FIGURE 1 GANTT CHART

## 2.3 PROJECT CALENDAR

Project stage	Key activities	Due date
Pre-Project	Consortium Agreement signed	
Project Start	Official Start	01 June 2024
	Distribution of Pre-Financing	M1
	Kick-off Meeting (Bologna, IT)	M1
Project Execution	Consortium Meeting (physical), Thessaloniki, GR or TBD (AAA)	M6, Ca NOV 2024
	Consortium Meeting (physical <sup>1</sup> or online) 2F SPAIN	M12
	Consortium Meeting (physical) France AV&AC	M16 (early Sep 2025)
	Interim Progress Reports	M6,12,18,24,30,36
	1st Periodic Activity Report   Technical and Financial (M1-M18)	M18
	First Review (online or physical if there is relative demonstration)	M18 – M20
	Consortium Meeting (physical or online) TEC May coincide with review	M18 -M20
	Interim Distribution of Payment after receipt of the funds from EC	Expected ca. M20
	Consortium Meeting (physical) F6S	M24
	Consortium Meeting (physical or online) BIR	M30
	Final Progress Report	M36
	Consortium Meeting (physical) YBQ ITALY	M36
	Project Closure	Final Project Review (online or physical if there is relative demonstration)
Final Periodic Activity Report   Technical and Financial (M19-M36)		M36
Distribution of Payment after receipt of the funds from EC <i>* (Funds are received at least after 60 days of project closure on M36)</i>		Ca M36-38
Continuous monitoring and reporting	Deliverables and Milestones	M1-M36
	Critical Risks for Implementation	M1-M36

TABLE 4 PROJECT CALENDAR

<sup>1</sup> Physical meeting places are listed per estimation, location and dates are to be fixed in previous GA

## 2.4 PROJECT REPRESENTATIVES

### 2.4.1 CONSORTIUM REPRESENTATIVES

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No	Acronym	Company	Role(s)	Person(s)
1	MAG	Maggioli	Project coordinator/ WP1 and WP6 leader	Nikos Achilleopoulos Eri Baloti Alexandra Malouta Olga Chatzifoti Kostas Kalamoukas Sabrina Bianchi
2	CS	CS Group-France	WP4 leader	Yana Lazarova Christophe Lorek
4	SOP	Sopra Steria Group	Lead AI-Powered Documentation Transformation	Bruno Favresse Maxime Claisse
5	F6S	F6S Network Ireland Limited	WP2 leader	Mateusz Kowacki Melissa Tang
6	YBQ	YOUBIQUO SRL	WP7 leader	Antonio Zinagarofalo, Antonio Zanesco, Luciano Magliulo
7	D3	D-CUBE	XR experiencing tools and remote training system	Paschalis Choropanitis, Eleni ZisiouAngeliki Karatzaferi
8	2F	2Freedom Imaging Software and Hardware SL	Lead 3D Digital Twin Authoring	Pedro Ortiz Coder
9	CETMA	Centro Di Ricerche Europeo Di Tecnologie Design E Materiali	WP3 leader	Luca Rizzi Sarah De Cristofaro

10	UPM	Universidad Politecnica De Madrid	S&T coordinator	Javier Serrano David Jiménez Francisco Moreno Verónica Ruiz Alberto del Río Iago Fdez-Cedron Fdez-Maqueira
11	TUD	Technische Universiteit Delft	Lead SSH framework Lead Cross-pilot Evaluation	Johannes Gartner Victor Scholten
12	TEC	Fundacion Tecnia Research & Innovation	WP5 leader	Iñaki Martinez Sarriegui Pablo Aguirrezabal
13	HGE	Hisense Gorenje Europe Poslovne Storitve DOO	End-user	Simon KOTNIK
14	AV	Aerospace Valley	End-user	Corentin PRAT-MARCA
15	AAA	Building Systems Innovation Centre (Architectural Aluminium Academy)	End-user	Maritina Vlachaki, Christos Grapsas Vasiliki Tzika
16	BIR	Bi-Rex - Big Data Innovation Research Excellence	End-user	Antonio Candido Danilo Mascolo
17	HEDNO	Hellenic Electricity Distribution Network Operator	End-user	Sotiris Christopoulos Evangelos Groupas
18	AC	Aerocampus Aquitaine	End-user	Florie LAURENTJOYE Fabienne DAVERAN

TABLE 5 CONSORTIUM REPRESENTATIVES

### 3 PROJECT RESOURCES

This section summarizes the project personnel resources, measured in person-months. Other project resources, such as development tools, code repository, project communication infrastructure, or any supporting means are described in later sections of the document.

#### 3.1 EFFORTS PER WORK PACKAGE

This section provides an overview of the total effort allocation according to the work breakdown structure of the project. The WP effort matches the effort stated in the GA. The task effort corresponds to the consortium internal agreement on the effort distribution.

Partner / WP	WP1	WP2	WP3	WP4	WP5	WP6	WP7
<b>MAG</b>	30	17	13	15	15	23	24
<b>CS</b>	4	7	15	38	10	9	8
<b>SOP</b>	1	4	6	24	0	4	3
<b>F6S</b>	2	36	2	0	0	0	6
<b>YBQ</b>	3	6	8	15	20	8	28
<b>D3</b>	1	5	2	15	20	4	19
<b>2F</b>	2	5	3	30	0	3	19
<b>CET</b>	3	5	45	4	6	4	22
<b>UPM</b>	12	8	13	20	8	20	18
<b>TUD</b>	1	4	34,5	0	0	0	6
<b>TEC</b>	2	4	7	16	25	2	9
<b>HGE</b>	1	3	6	5	9	7	26
<b>AV</b>	1	0,5	2,5	0	0	0	12
<b>AAA</b>	1	6	3	2	4	3	23
<b>BIR</b>	2	5	4	0	0	4	22
<b>DED</b>	0,5	3,5	3	0	6	3	20
<b>AA</b>	1	1	2	0	0	0	6
<b>Total</b>	67,5	120	169	184	123	94	271

TABLE 6 PROJECT EFFORT DISTRIBUTED PER WP

## 4 PROJECT MANAGEMENT

### 4.1 PRINCIPLES

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Motivate XR is based on a management structure tailored to the specific project context and the partners involved in order to provide effective project management and to ensure that all objectives are achieved within the given time, cost, and resource constraints. For this reason, the overall management of the Motivate XR project will comply with the following principles:

- Principle of creating an integrated project structure incorporating technical, scientific, and administrative coordination as well as issues of commonplace business operation supported with the state-of-the-art management instruments.
- Principle of achieving agreement upon all partners and guaranteeing the arrangement of decision making close to the responsible levels of execution as well as elevate them if necessary, concealing the reliable and trusted agreements in order to protect intellectual properties of all partners.

### 4.2 PROJECT GOVERNANCE

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The project governance is the management framework defining how the project decisions must be taken. Its structure indicates specific project players, their roles, and responsibilities, as well as their way of interaction during the lifetime of the project. This structure aims at an effective project evaluation, control, and decision-taking, while ensuring an effective participation, motivation of all partners, and a proper conflict resolution.

#### 4.2.1 MANAGEMENT STRUCTURE AND PROCEDURES

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The Project Management structure has been defined to support decision-making and innovation, ensuring that the project can respond to changes in markets, technologies, and strategic objectives of stakeholders. The selected organizational structure is deliberately simple, enabling the implementation of the work with minimal and precise management.

Key roles in the project have **MAG** as overall *Project Coordinator* and **UPM** as *Technical Manager*. With respect to the size of the consortium a **3-Layer hierarchical management structure** with clear responsibilities has been defined: the **Coordinator** is responsible for the project organization and towards the Commission, the **General Assembly** is responsible for project strategic decisions and directions while the **Project Management Team (PMT)** for implementing such decisions on a day-to-day basis. The project is subdivided into 7 *Work Packages* dealing with the respective major work areas. Other relevant management actors are explained below:

**General Assembly:** The General Assembly shall consist of one representative of each Party (hereinafter "Member"). Each Member shall be deemed to be duly authorised to deliberate, negotiate and decide on all matters listed in the Consortium Agreement.

- The Coordinator shall chair all General Assembly meetings, unless decided otherwise in a meeting of the General Assembly.
- Any Party, which is a member of the General Assembly:
  - should be present or represented at any meeting (physical or remote),
  - may appoint a substitute or a proxy to attend and vote at any meeting, and
  - shall participate in a cooperative manner in the meetings.
- The Parties shall use reasonable endeavors to maintain their representation in the General Assembly
- The Parties agree to abide by all decisions of the General Assembly
- The PC shall convene ordinary meetings of the General Assembly at least every 4 months and shall also convene extraordinary meetings at any time upon written request of one-third of the Members of the General Assembly.

**Project Management Team (PMT):** The *PMT* is responsible for managing the project implementation based on the decisions of the *General Assembly* and for making proposals to the General Assembly. The Project Management Team shall:

- Provide an environment of discussion, interaction, and collaboration between WP leaders on the advancement and results of each WP and their effects and interaction with other WPs.
- Advise and support the decisions of the Coordinator on project operational issues.
- Advise on particular managerial issues related to the work plan and tasks.
- Report on the technical progress of the project.
- Propose an update of the implementation plan if necessary

The Project Management Team encompasses the following roles:

- The PC - Project Coordinator (MAG): is responsible for the day-to-day management, communication and coordination of the project and acts as an interface to the European Commission.
- The TM - Technical Manager (UPM): is responsible to ensure that the project technical objectives are met. Together with the WP Leaders, they coordinate the technical work and support the Project Coordinator in the day-to-day technical management.
- The QRM - The Quality and Risk Manager (MAG): is responsible for the planning, implementation and overview of the quality procedures determined in the Quality Plan and the verification of the project results against quality criteria. They are also responsible for the early identification, assessment, and – along with the support of the Project Management Team – the management of administrative and technical risks.
- The IEM - Innovation and Exploitation Manager (MAG): is responsible for the overall organization and time competition of the market analysis, elaboration of potential joint exploitation models and plans creation, and for supporting the partners in setting up their individual business plans, in order to exploit the project results.
- The CDM - Communication and Dissemination Manager (F6S): is responsible to raise public awareness and ensure wide communication of the project results. S/he will also be responsible for the coordination of the scientific dissemination, clustering and standardization activities.

- The SELM- Societal, Ethical, and Legal (TUD): is responsible to ensure that an appropriate data management plan is developed and used to protect the privacy of data and address all other data management aspects. They are also responsible for ensuring the proper treatment of legal and ethical issues.

**Motivate XR Advisory User Group (AUG):** Motivate XR has established a well-balanced advisory board and user group, comprised of SMEs, institutions, and individual experts, acting as Associate (non-funded) partners. These stakeholders will contribute to discussions on market and innovation stimuli, provide technical directions, and act as channels and multipliers for the exploitation of the project's results. The AB/UG will meet at least twice during the project lifetime

Roles include:

**Project Coordinator (PC):** The *PC*, is responsible for the day-to-day management, communication and coordination of the project and acts as an interface to the Commission. They chair the *PMT* and the *General Assembly*.

**Technical Manager (TM):** The duties of the *TM* are to ensure that the project technical objectives are met, to coordinate the technical work of partners and support the *PC* by running the day-to-day technical management.

**Innovation, Exploitation (IEM) and Quality Manager (QM):** The *IEQM* ensures that the project innovation objectives and exploitation potential are met and oversees IPR issues. Their main responsibilities include the development of the Quality Plan of the project, the review of project deliverables and the initiation of actions, reporting to the *WPL*, *the TM* or the *PMT*, when needed. It should be emphasized that any deliverable (or any information in general) in order to be published should also have the approval of the *DEM*.

**Exploitation Committee (EC):** The *EC* makes sure that the project developments are aligned at all times with the related technological and market evolution. It also monitors and agrees on all aspects related to exploiting the pre-commercial Motivate XR solution (IPR issues, agreements among partners, exploitable assets, market entry strategies, etc.).

The *EC* meets virtually and face-to-face in combination with plenary meetings. The *EC* is chaired by the *IEQM* from MAG and includes the Technical Manager (UPM), the Data Manager (TUD) and one representative from each of the remaining partners in the Consortium (MAG, CS, SOP, F6S, YBQ, D3, 2F, CET, UPM, TUD, TEC, HE, AV, AAA, BIR, DED, AAA), all under the supervision of the Exploitation/Innovation Manager (MAG).

**Societal, Ethical, and Legal Manager (SELM):** The *SELM's* responsibility is to ensure that an appropriate data management plan is developed and used to protect the privacy of data and address all other data management aspects. They are also responsible for ensuring the proper treatment of legal and ethical issues.

**Work Package Leader (WPL) & Task Leader (TL):** The responsibilities of the WPL and TL are to manage and report on the progress of the work plan related to their WP or Task respectively. They identify risks at WP level, track them, and propose corrective actions in the event of problems. They also provide regularly reports at WP level, control the quality and the schedule of work. All WPL cooperate among them and with the PC and TM for the integration of their results into succeeding WPs or tasks.

The following table presents each role with its belonging members. For a description on each role assigned tasks and responsibilities, please refer to the GA Annex.

Role	Partner	Contact Person
Project Coordinator	MAG	Nikos Achilleopoulos
Technical Manager	UPM	David Jimenez Bermejo
Innovation, Exploitation Manager	MAG	Kostas Kalaboukas
Data & Ethical Manager	TUD	Johannes Gartner
Quality and Risk Manager	MAG	Kostas Kalaboukas
Communication and Dissemination Manager	F6S	Nuno Varandas
WP1 leader	MAG	Nikos Achilleopoulos
WP2 leader	F6S	Mateusz Kowacki
WP3 leader	CETMA	Lucca Rizzi
WP4 leader	CS	Christophe Lorek
WP5 leader	TEC	Inaki Martinez
WP6 leader	MAG	Olga Chatzifotu
WP7 leader	YBQ	Luciano Magliulo

TABLE 7 PROJECT GOVERNANCE ROLES

#### 4.2.2 DECISION MAKING PROCESS

The strategic guidance and overall decisions within Motivate XR are made by the General Assembly based on a consensus-building process in accordance with its responsibilities.

- Decisions will normally be taken by the responsible team members, and organization bodies based on the Grant Agreement, the Consortium Agreement, the Description of Action (DoA) and the Quality Plan, as well as the individual WP or Task plans, depending on the nature of the issue at hand.
- The PC will present issues of strategic importance, unresolved problems and any conflicts or disputes with proposals for solutions to the General Assembly to obtain a decision
- In the case of major disagreement, a qualified majority voting according to the Consortium Agreement will be applied, with the PC having the casting vote in case of a tie.
- The project partners are committed to put in practice the decisions of the General Assembly and PMT.
- Short term decision making, and inter-WP dependencies are monitored by the PC, TM and the IEQM (depending on the nature of the issue) to ensure consensus within the project on decisions which have significant impact on other WPs.

- For technical decision making, the PMT, managed by the TM, will be responsible for all decisions within the guidelines of the General Assembly, including the choice between different technical alternatives. Such decisions, in a consensus-building process will only be taken on purely technical justification such as technical performance, effort and risk to achieve the project's overall objectives. In case of major disagreement, a qualified majority voting procedure according to the Consortium Agreement will be invoked, with the TM having the casting vote in case of a tie.

#### 4.2.3 CONFLICT RESOLUTION

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In the case of a dispute between two or more team members, an escalation procedure must be followed:

- 1) the implementation team will inform the WPL for the conflict occurred,
- 2) the WPL will organize the WP team meeting
- 3) in case of agreement, the team will inform the respective consortium body,
- 4) if no decision is taken, the WPL will inform the PC. The latter will contact the responsible persons and will try to resolve the conflict. If no solution can be found, the PC will inform the General Assembly and/or PMT respectively (depending on the nature of the issue),
- 5) the General Assembly and/or PMT will meet virtually or face-to-face to discuss the conflict and take the final decision by voting.

The final decision must be accepted by all parties. For the settlement of disputes, which cannot be resolved in the project, arbitration will be applied.

#### 4.2.4 PROBLEMS CONCERNING THE PERFORMANCE OF A PARTNER

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A more serious issue concerns when a partner is not performing their technical tasks satisfactorily. This will most likely be raised first by the WPL involved and reported to the PC. Later, if necessary, it will also involve the General Assembly for specific technical information about the defaulting partner.

The first actions to be taken will be direct discussions with the partner concerned to correct the inadequacies. If these do not lead to a satisfactory conclusion, the General Assembly will meet to decide on actions. Possible sanctions concern:

- To suspend the next payment from the Commission, be it part of a previous advance that had been partially paid, or the next phase advance payment
- To decide to move part of the outstanding work from the partner concerned to another partner in the same work package, with a subsequent transfer of budget
- To request the partner to leave the consortium.

(If and when necessary, please refer to the CA for further details)

#### 4.2.5 PROBLEMS CONCERNING THE FINANCIAL STABILITY OF A PARTNER

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The consortium has joint technical and financial liability concerning the project. If serious concerns regarding the financial soundness of a partner exist, or a partner is increasingly going into debt, or if the financial situation of the partner changes in a substantially negative way, there is an obligation on the partner to report this to the PC.

The PC will liaise with the Financial Secretariat to prepare an assessment of the risks to the project, which will then be discussed with the General Assembly. First, a complete assessment of the work satisfactorily completed by the partner will be carried out, and based on the progress reports to date and the advance payments received by the partner, a calculation will be made of the credit or debit of the partner to the EC. Then a direct discussion with the partner concerned will determine the capacity of the partner to carry out the contractual work in the next period.

This will allow the General Assembly to evaluate the risk to the project, both financial and technical. Concerning the financial risk, an evaluation will be made of the risk of providing the next advance payment to the partner. In any case, at this stage an audit certificate for the work done to the date will most likely be requested of the partner.

In moderately serious cases, the next advance payment will be suspended until the next six months' work is completed. Then the partner will be requested to provide an audit certificate for the period involved, and the PC will decide whether to pay the costs sustained by the partner. This is again a risk assessment activity, as the PC will be assessing whether the EC will accept the partners declared costs in the next Cost Statement.

*(If and when necessary, please refer to the GA and CA for further details)*

#### 4.2.6 CHANGE MANAGEMENT

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Any modifications that may be required in the workplan must be promptly reported to the PC. Requests for modification could come from a particular work package: in this case the WP Leader should report the situation to the TM and the PC.

Other instances of change could occur based on general project assessments, carried out as part of the normal management. If the workplan needs to be changed, the PC will need to discuss this with the EC. If a Review is imminent, it may be more practical to present the revised situation to the Reviewers, who can then recommend the change as an outcome of the Review.

It is worth to remember that an amendment can take more than one month to be approved by the EC.

*(If and when necessary, please refer to the GA and CA for further details)*

#### 4.3 PROJECT COMMUNICATION

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Efficient communication and collaboration procedures are essential for the success of the project. Since all project partners are distributed across European member states, the centerpiece of the overall project communication will be a protected online collaboration platform, offering to each

partner independent access to important documents, code, meeting agendas, supporting materials, individual to-do lists and other miscellaneous project information.

#### 4.3.1 PROJECT MEETINGS

In order to ensure clear and efficient project progress, regular physical as well as remote meetings will be held. The following table summarizes the planned timetable of the various project meeting.

<b>Consortium Body</b>	<b>Ordinary Meetings</b>	<b>Extraordinary Meetings</b>	<b>Objectives</b>
General Assembly	<i>Physical (preferably):</i> At least quarterly <i>Remote:</i> monthly, extending the General Assembly conference call	At any time upon written request of 1/3 of General Assembly members (physical or remote)	<ul style="list-style-type: none"> <li>• Enable and facilitate the communication and information exchange between Motivate XR partners</li> <li>• Support decision making process</li> <li>• Enable effective collaboration between Motivate XR partners</li> </ul>
Project Management Board telco	<i>Monthly via telco</i>	At any time upon written request of 1/3 of General Assembly members (physical or remote)	<ul style="list-style-type: none"> <li>• Monitor Motivate XR progress at technical, financial, administrative, ethical, exploitation and Dissemination level</li> </ul>
Technical telco	<i>Monthly via telco</i>	At any time upon request of any member	<ul style="list-style-type: none"> <li>• Monitor day-to-day technical progress</li> <li>• Make conjoint technical decisions</li> <li>• Promote discussions and exchange on technical results</li> </ul>
WP/task telco	<i>According to the WP/Task plan and needs</i> <i>Agreed by each WP</i> <i>/recommended monthly</i>	According to the WP/Task plan and needs	<ul style="list-style-type: none"> <li>• Review the progress of the tasks and activities carried out.</li> <li>• Discuss in detail WP/task</li> <li>• Define concrete implementation actions</li> </ul>

TABLE 8 PROJECT MEETINGS

### 4.3.2 EMAILS AND EMAILING LISTS

The project has set-up the following mailing lists (Status 30/07/2024):

Name	Address	Purpose
General Emailing List	MotivateXRgroup@maggioli.it	General communications to all partners
WP 1 Emailing List	motivatexr_wp1@maggioli.it	Communication among partners involved in WP1
WP 2 Emailing List	motivatexr_wp2@maggioli.it	Communication among partners involved in WP2
WP 3 Emailing List	motivatexr_wp3@maggioli.it	Communication among partners involved in WP3
WP 4 Emailing List	motivatexr_wp4@maggioli.it	Communication among partners involved in WP4
WP 5 Emailing List	motivatexr_wp5@maggioli.it	Communication among partners involved in WP5
WP 6 Emailing List	motivatexr_wp6@maggioli.it	Communication among partners involved in WP6
WP 7 Emailing List	motivatexr_wp7@maggioli.it	Communication among partners involved in WP7

TABLE 9 PROJECT'S EMAILING LISTS

#### 4.3.2.1 EMAIL MANAGEMENT

The mailing lists are hosted and managed by Management, responsible for the project communication infrastructure. These lists are based on Microsoft Exchange, Outlook and SharePoint technologies.

The management of the mailing lists are the ultimate responsibility of MAG as coordinator. Nonetheless, every partner is accountable to notify the coordination team about any change in the list: inclusion of new members, modification of existing details, or the removal of included names.

#### 4.3.2.2 COMMUNICATION RULES

For a suitable use of the mailing lists, these rules are to be followed by all partners:

- **SUBJECT:**
  - Make sure to add the "MotivateXR" word in front of the subject line, to identify the communication. E-mail addresses to the official mailing lists will automatically have an identifier appended in front of the subject line, like [MotivateXR].
  - In order to segment the information, include the corresponding WP in the subject, followed by the real subject.
  - Use explicit Subject title. The subject should be a clear indication of the content (for instance, "WP1", "Meeting minutes DD-MM-YYYY").

- It is highly recommended to keep record of the conclusions and decided actions on the email.
- It is highly advisable to consider if the decided actions should trigger other project mechanisms, such as: i) add other partners/roles in the loop, ii) ask for support, advice, or arbitration, iii) raise any potential risk to the pertinent role or consortium body.
- **ATTACHMENTS:** Try to avoid attachments as much as possible in your emails, using a link to the repository instead.

In addition, some specific keywords can be also used in the subject. For instance:

- **[URGENT]:** an answer is necessary in a week
- **[EXTREMELY URGENT]:** an answer is necessary max in two days
- **[IMPORTANT TO READ]:** an e-mail that despite longer than usual deserves to be completely read and, if requested, to receive feedback.

Finally, it is worth to note that in such distributed projects the adoption of e-mails is of primary importance to keep alive the communication among partners and make more effective the daily working activities. Not answering to e-mails is then considered impolite and evidence of scarce commitment toward the project activities. In case of absence for more than two or three days and when unable to reply to e-mails, it is advisable to set up an “out-of-office message”.

### 4.3.3 COLLABORATION TOOLS & CONFERENCING SYSTEM

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For communication purposes a Microsoft Teams group has been setup. Microsoft Teams is a business communication platform developed by Microsoft, as part of the Microsoft 365 family of products. Teams primarily offers workspace chat and videoconferencing, file storage, and application integration.

Motivate XR is taking advantage of the following Teams features:

- Channels, so as to reduce internal e-mail exchanging for messages and tasks intended for specific recipients
- Files per channel capacity
- Third-party integrations
- Integration with Microsoft Streams for recording telco’s (available per channel)
- Calendar functionality
- Instant Meeting Features

### 4.3.4 PROJECT REPOSITORIES

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All project-related documentation will be stored in the project repository. It provides the support needed by the documentation storage, review process, information sharing, and work in groups by all partners in order to achieve the common goals of the project.

All relevant information for the project is to be stored in this repository, including contractual documents (GA, CA), amendments, review-related documentation, reporting documentation, contact details, templates, working documents of deliverables, internal working documents, agendas, minutes, etc. Moreover, final versions of all deliverables are to be uploaded.

The project repository is available at the following URL:

<https://maggiolispa.sharepoint.com/sites/MotivateXRgroup/SitePages/ProjectHome.aspx>

This repository is organized according to the work packages of the project. Each folder will contain a subfolder structure, containing the WP meetings and one subfolder per deliverable. Other required folders are possible, always with a descriptive name of the content.

## 4.4 PROJECT REPORTING

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The project reporting, along with deliverables, is the procedure used by the EC to assess and follow up the funded 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 project reporting is a responsibility of the whole Consortium and every partner has to be involved in it.

There are two types of reporting documents including technical and financial information: Periodic and Progress reports. The former ones include those official reports that must be submitted to the EC. The latter ones refer to those internal documents that will be used as control measures to ensure adequate technical and economic progress and to monitoring Motivate XR project. These progress reports will also feed official ones. Details of the reporting flow are explained below.

### 4.4.1 Continuous reporting on SyGMA

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The project is continuously reporting data on the participant portal SyGMA - System for Grant Management (europa.eu)<sup>2</sup>. **Same details apply as for the technical report (see below)**

All Partners are able to report on several aspects of the project, either by informing and providing the required information to the PC, or by directly entering the information on the system.

#### **Information directly entered includes:**

- Partners Financial data in periodic reports
- Researchers involved in the project (dedicated tab) and also information on number of persons involved in the project (type, gender, etc.)
- Intellectual property rights (IPR)
- Publications
- Dissemination Activities

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<sup>2</sup> <https://ec.europa.eu/research/participants/grants-app/reporting/DLV-101135963>

- Communication Activities
- Risks
- Milestones status
- SME Impact (only for entities identified as SMEs)

**Information compiled by the admin team in cooperation with all partners:**

- Project Summary
- Impact
- Impact Continuation

#### 4.4.2 INTERIM PROGRESS REPORT

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Every 6 months partners will be requested to describe activities performed during the corresponding period.

The steps to be followed are explained below:

- At the end of each reporting period, the Coordinator will send the WP leaders an email with instructions and templates to be filled in.
- The WP Leaders will ask the Task leaders (and involved) for contributions to elaborate the report.
- The WP Leaders will send the consolidated report on the activities carried out to the PC.
- The PC and TM will check the reports and send to the consortium the consolidated version.

It is possible that the PC and/or TM requests partners additional information to clarify or explain certain tasks.

#### 4.4.3 Management Reporting

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##### 4.4.3.1 Periodic Reports

For each official reporting period the technical progress of the project must be communicated to the EC by preparing the Periodic Activity Reports, in order to claim for the interim payment. The PC, with the support of the TM, will be in charge of preparing them based on the information provided during progress reports. The deadline for submitting official reports is **60 days** after the end of the period (**M18** and **M36** respectively).

##### 4.4.3.2 Technical Report

For each reporting period, a technical report shall be submitted to the EC in order to claim for the interim payment(s).

The PCO, with the support of the TM, is in charge of preparation and submission of the Periodic Reports (PR), based on the contributions provided by the Partners. To facilitate collection of the data, WP leaders will be actively involved in the compilation of the scientific/technical parts of the PPRs, and WP Leaders in turn will demand inputs from the involved partners.

<b>Periodic Technical Report – Part A (compiled for SyGMa)</b>			
<b>Section</b>	<b>Responsibilities</b>		
	<b>Input from</b>	<b>Compiled by</b>	<b>Reviewed by</b>
Summary of the context and overall objectives of the project	-	PC+TM	PC
Work performed from the beginning of the project to the end of the period covered by the report and main results achieved so far	WP Leaders	TM+PC	PC
Progress beyond the state of the art and expected potential impact (including the socio-economic impact and the wider societal implications of the project so far)	WP Leaders	TM	PC
Milestones	Lead partners	PC	GA
Foreseen risks (Annex I)	ALL partners	QM	PC
Unforeseen risks	ALL partners	QM	PC
Publications	ALL partners	CDM	PC
Dissemination and Exploitation of results	ALL partners	CDM + IEM	PC
Innovation	ALL partners	CDM + IEM	PC
SME impact	ALL partners	ALL partners	PC
Open Data	ALL partners	CDM	PC
Gender	ALL partners	ALL partners	PC

TABLE 10 PERIODIC TECHNICAL REPORT – PART A RESPONSIBILITIES

<b>Periodic Technical Report – Part B (to be uploaded on SyGMa)</b>			
<b>Section</b>	<b>Responsibilities</b>		
	<b>Input from</b>	<b>Compiled by</b>	<b>Reviewed by</b>
Objectives	-	TM	PCO
Explanation of the work carried out and overview of the progress	WP Leaders	TM	PCO
Impact	WP Leaders	TM	PCO
Update of the plan for exploitation and dissemination of result (if applicable)	ALL partners	CDM + IEM	PC
Update of the data management (if applicable)	ALL partners	DMP Leader	PC
Follow-up of recommendations and comments from previous review(s)(if applicable)	ALL partners	TM	PC
Use of the resources	ALL partners	PC	GA
Deviations from Annex 1(if applicable)	ALL partners	PC	GA
<i>Explanation of deviations (Tasks)</i>	ALL partners	TM	PC
<i>Explanation of deviations (Resources)</i>	ALL partners	PCO	GA
<i>Unforeseen subcontracting</i>	ALL partners	PCO	GA
<i>Unforeseen in-kind contributions</i>	ALL partners	PCO	GA

TABLE 11 PERIODIC TECHNICAL REPORT - PART B RESPONSIBILITIES

The deadline for the submission is 60 days after the end of each reporting period (M18, and M36, respectively).

#### 4.4.4 Financial Reporting

##### 4.4.4.1 Progress Reports

The financial reporting process has been designed to follow up budget execution and detect possible deviations.

Each partner (and linked third parties) has been granted resources for each work package as specified in the GA. They will report, in the cost reporting template, the corresponding hours per Task allocated during the reporting period. This information will be used by the PO to monitor the progress, and the associated human resources declared by the partners. The steps to be followed are explained below:

- At the end of each reporting period, the Coordinator will send partners an email with instructions and templates to be filled in.
- During the next 15 days after the end of each reporting period, each partner (and its linked third party) will send to the PC its financial cost report using a provided template.

- During the next 15 days the PC will check the financial report and ask partners for possible justifications and/or corrections.
- Once information has been validated, in the next 15 days the PC will send this information to the PO.

It is possible, that the PC and/or PO requests partners for further information to clarify or explain certain costs.

#### 4.4.4.2 Periodic Reports

For each official reporting period (**M18** and **M36**) the financial status of the project and the costs incurred during the period must be communicated to the EC by preparing Financial Statements (FS) in order to claim for the interim payment. Each partner (and linked third parties) will upload its corresponding financial information to the research participant portal based on cumulative information obtained from progress cost reporting document. The following procedure will be applied:

- The PC will ask all partners (and linked third parties) to generate their FS. It is a procedure in which each partner officially declares the costs incurred for the reporting period.
- Each partner will complete the FS with the costs incurred during the period. Also, a pop-up window will open to give a summary of the person months per each WP.
- Each partner will submit and digitally sign the FS. This signature will be provided by the Project Financial Signatory appointed.
- Once all partners have submitted and signed their FSs, the PC will submit the financial report to the EC.

## 4.5 FINANCIAL MANAGEMENT

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Funding and payment principles are regulated by the GA and CA. Payment modalities are specified by the EC including evaluation and approval processes, as well as by the consortium as a whole concerning the distribution of budget among the partners.

To avoid any misunderstanding of these regulations, the texts are not copied to this deliverable. Please note:

- Only eligible and justifiable costs are accepted by the EC (Eligibility defined in the GA)
- Every partner is responsible of keeping records of personnel costs and any other expenses linked to the project
- The reimbursements are decided by the EC who is the ultimate decision maker when it comes to deciding whether declared costs are in line with the eligibility criteria.

### 4.5.1 Individual Financial Statements

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The individual FS needs to be submitted electronically by each partner to the EC through the SyGMA portal.

The budget categories are listed in the Grant Agreement, and reported herein for simplicity:

**A. Direct personnel costs:**

- costs for employees (or equivalent);
- costs for natural persons working under a direct contract other than an employment contract.
- costs of personnel seconded by a third party against payment.
- costs for SME owners not receiving a salary.
- costs for beneficiaries that are natural persons without salary.

**B. Other direct costs:**

- Travel costs and related subsistence allowances.
- Equipment costs.
- Costs of other goods and services.
- Capitalised and operating costs of large research infrastructure.

**C. Direct costs of subcontracting<sup>3</sup>**

Any subcontract must be awarded according to the principles of best value for money or, if appropriate, the lowest price. In doing so, it must avoid any conflict of interests (Article 35 of the Grant Agreement). Framework contracts between a participant and a subcontractor, entered into prior to the beginning of the project that are according to the participant's usual management principles may also be accepted.

**D. Direct costs of providing financial support to third parties (if applicable)**

**E. Costs of in-kind contributions not used on partner's premises (if applicable)**

**F. Indirect costs.**

Indirect costs are calculated using this formula:

$0,25 * (\text{direct personnel costs (A)} + \text{other direct costs (B)} - \text{Costs of in-kind contributions (E)})$

Note that costs of subcontracting are excluded!

**G. Specific cost categories (if applicable):**

This category only applies where specific activities are reimbursed by unit costs or lump sum costs. For the General Model Grant Agreement, this is currently the case for 'access costs for providing transnational access to research infrastructure', 'costs for y measures in buildings' and 'costs for clinical studies'.

## 4.5.2 Certificate of Financial Statements

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<sup>3</sup> If a subcontracting will be needed during the project implementation, please inform timely the Project Coordinator (MAG), who in turn will inform the General Assembly. Once the subcontracting has been discussed and approved by the General Assembly, the Project Coordinator will launch a formal amendment to the Grant Agreement. The tasks to be subcontracted and the estimated cost for each subcontract must be set out in Annex 1 of the Grant Agreement and the total estimated costs of subcontracting per beneficiary must be set out in Annex 2 of the Grant Agreement.

The Commission may however approve subcontracts not set out in Annex 1 and 2 without amendment, if (i) they are specifically justified in the periodic technical report, and (ii) they do not entail changes to the Grant Agreement, which would call into question the decision awarding the grant or breach the principle of equal treatment of participants.

A Certificate of Financial Statements (CFS) is requested for each partner in case the total EU contribution is higher than EUR 325.000, as reimbursement of actual and unit costs. This means excluding the reimbursement of indirect costs.

Partners submit:

- either one certificate per reporting period<sup>4</sup>, or
- or a single CFS for the whole project.

In both cases, the certificate and related costs may only be submitted with the final financial report. Please note that you have to keep the financial records of the expenses (digital or hardcopy) for a minimum of **5 years** after the final payment has been received.

### 4.5.3 Financial Deviations

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The process to manage financial deviations is explained below:

- The partner who incurs any financial deviation must communicate it as soon as possible to the PC.
- If the PC considers they are minor deviations, a detailed explanation will be provided in the official report. Otherwise, if they are considered major deviations, the PC will communicate it to the PO.
- The PO will decide its acceptance or rejection. In case of acceptance, the PO will decide if it is necessary or not an amendment.

### 4.5.4 Re-Distribution of Budget

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In case of major deviations in the progress of the project or in the use of resources by partners, the General Assembly may include a discussion about the re-distribution of resources. In case the General Assembly decides to modify the budget, the PC needs to negotiate this with the EC.

## 4.6 IPR MANAGEMENT

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IPR Management is a very important issue to be aware of within the project. The Consortium Agreement and further exploitation and sustainability plans will define exactly the outcomes of the knowledge management and the protection strategy.

To avoid any misunderstanding, the relevant texts are not copied in the document herein. Nevertheless, there are some aspects that shall be clear to all partners.

When generated new results, jointly or individually, the process to be followed is:

- 1) A partner detects a new result that could be considered subject to Intellectual Property issues. In case of joint ownership, co-owners should establish a separate agreement, defining in detail the allocation and terms of exercising their ownership.

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<sup>4</sup> Choose this option, only when you expect to exceed the threshold of EUR 325.000 at the end of the project.

- 2) The detection of this new result is communicated to the General Assembly. In addition, the owner(s) shall communicate which management tool will be selected in order to manage the intellectual property: transfer, protection, dissemination, exploitation or confidentiality.
- 3) Depending on the chosen managing tool, the IEM will give advice regarding the different options, possibilities, procedures and methodologies in order to provide the optimum treatment of the result for IPR purposes.

## 5 QUALITY ASSURANCE

### 5.1 DOCUMENT MANAGEMENT PROCESS

#### 5.1.1 DOCUMENTS LANGUAGE

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English is the official language in Horizon Europe projects; therefore, all the documents must be written in English, using the appropriate grammar rules and a formal language. Some dissemination material (such as press releases, newsletters, fliers, etc.) can be considered as an exception for this rule and can be translated to other relevant languages for the project.

#### 5.1.2 Documents storage

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The project must provide methods for information sharing by using a project electronic repository, accessible to the consortium members, where all the common project information and shareable information will be stored and updated.

A partner within the consortium should be assigned as responsible for the general maintenance of the project repository. Work package leaders are responsible for the document organization of their corresponding work package. Deliverable leaders are responsible of the maintenance of their documents. All partners contributing to a document are responsible of the maintenance of the document according to the guidelines included this document and the instructions given by the deliverable leader.

The internal structure for the electronic repository can be chosen by the consortium in the best way fitting the project purposes, but it should be clear and comprehensible by all partners, whereas it should be designed in a way aiming to facilitate the internal work. It is advisable to name the root folder using the short name of the project and include the following folders (including a sub-folder structure where needed):

- **Administrative:** This folder should contain all the administrative documentation such as Consortium Agreement, Grant Agreement, project amendments (if any), project budget, project time-plan, etc.
- **Meetings:** This folder should contain all the information about the meetings and telcos held in the project. A dedicated folder for each of them should be created and should include the agenda, minutes and other supporting documents.
- **Final deliverables:** This folder should contain the deliverables' final version sent to the EC (in PDF format).
- **General:** This folder should contain all the support documentation used in the project, including templates, contacts, project meetings, and reference material.
- **Work Packages (WP Folders):** These folders should contain all the working versions for the project deliverables and documents, organised in a work package manner, so it should contain at least a sub-folder for each one of the work packages of the project. The work package folder organisation is responsibility of the work package leader, but it is advisable to include a sub-folder for each of the work package's tasks.

- **Reviews:** This folder should contain all the information in relation to the technical reviews of the project to be carried out by the EC.

### 5.1.3 Documents nomenclature

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The deliverable leader should name all the deliverables of the project previous to the final version, according to the following nomenclature:

**<Project\_Name>\_<Dx.y>\_<Deliverable\_Name>\_<vm.n>\_<Suffix>**

**e.g. "MotivateXR\_D1.1\_Project Management Plan\_v0.1\_MAG"**

According to this format, the final version of the submitted deliverables to the EC, should have the following nomenclature:

**<Project\_Name>\_< Dx.y>\_<Deliverable\_Name>\_v1.0**

**e.g. "MotivateXR\_D1.1\_Project Management Plan\_v1.0"**

Where:

- **Project\_Name:** Refers to the project's short name.
- **Dx.y:** Is the deliverable number as defined in the DoA, where:
  - x: the number of the corresponding work package,
  - y: the deliverable number within the work package.
- **Deliverable\_Name:** Refers to the name of the deliverable that should be matched exactly with the name of the deliverable as defined in the DoA.
- **vm.n:** Refers to the version of the deliverable, where:
  - m: 0 for the draft versions, 1 for the final version (delivered to the EC),
  - n: consecutive number from 0 to 9, which can be extended to several digits if necessary.
- **Suffix** (optional): can be used to identify intermediate versions or contributions from partners to a draft version (never in a final version) and could include dates, short name of partners, etc.

### 5.1.4 Documents format

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#### 5.1.4.1 Software

The following standard tools will be used for the generation of project's documents:

- **Microsoft Word (docx):** Will be the standard word processor for documents production, where for the documents that may need of corrections and contributions from several partners, the "Track Changes" function shall be enabled and used.
- **Microsoft PowerPoint (pptx):** Will be the standard tool to make project's presentations.
- **PDF:** Will be the standard format of the final submitted deliverables.

## 5.2 DELIVERABLES REVIEW

### 5.2.1 Internal review planning

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The deliverable review process is initiated by the project Quality Manager. The first step is the creation of the internal review planning document.

Two organizations will be appointed as peer reviewers for the deliverable based, if possible, in the following criteria:

- The number of deliverables assigned to an organization should be proportional to the workload of the organization within the project.
- The organizations in charge of the deliverable review should not be directly involved in the specific task and deliverable but having enough knowledge of the area in which the deliverable was based.
- The persons within the organization reviewing the document should have at least basic knowledge about the project, ideally being persons working in the project but not involved in the development of the task and the deliverable.

## APPENDIX A

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Communication to Horizon beneficiaries, "How to avoid errors when claiming costs in H2020 grants"  
[https://ec.europa.eu/research/participants/data/ref/h2020/other/comm/190305\\_avoiding-errors-when-claiming-costs\\_en.pdf](https://ec.europa.eu/research/participants/data/ref/h2020/other/comm/190305_avoiding-errors-when-claiming-costs_en.pdf)