HeriTACE

PROJECT MANAGEMENT Handbook

Deliverable D1.1

Version N°1.0

Funded by
the European Union

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Project information

Grant Agreement	n°101138672
Project Title	Future-proofing Heritage Townhouses by Optimising Comfort and Energy in Time and Space
Project Acronym	HeriTACE
Project Coordinator	Arnold Janssens, Ghent University
Project Duration	1 January 2024 - 31 December 2027 (48 months)

Deliverable information

Related Work Package	WP1 Project Management
Related Task(s)	Task 1.1
Lead Organisation	Ghent University
Contributing Partner(s)	Consortium
Due Date	31/03/2024
Submission Date	27/03/2024
Dissemination level	PU

History

Date	Version	Submitted by	Reviewed by
17/01/2024	0.1	Marianne Van Lancker	Eline Himpe
06/02/2024	0.2	PMT	Consortium

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Executive Summary

To ensure project execution of the highest quality, a variety of standardised procedures, templates and instructions related to the management was established and is documented in this Project Management Handbook.

Abbreviations and acronyms

Acronym	Description
AGA	Annotated Grant Agreement
CA	Consortium Agreement
DoA	Description of the Action – annex 1 to the GA
EC	European Commission
EU	European Union
F&T Portal	Funding and Tenders Portal (EU-portal)
GA	Grant Agreement
HEU	Horizon Europe
PMT	Project management team
PO	Project officer
RP	Reporting period
WP	Work Package
WPL	Work Package Leader

1. Introduction

1.1 Purpose

This Project Management handbook (PM handbook) has two main goals:

- It is a source of reference for all beneficiaries regarding many day-to-day activities of the project, and
- It offers standardised procedures and templates to guarantee project management of the highest standard

1.2 Guiding documents

The general principles for the execution of European funded projects are defined in the EU Grant Agreement (GA), including the Description of the Action (DoA) – annex 1 to the GA, and the Consortium Agreement (CA).

The PM handbook does not replace any of these agreements, nor does it replace any of the EU guidelines for project implementation, as there are the Annotated Model Grant Agreement (AMGA) and the online 'IT How to'-manual.

You can consult these agreements and guidelines through the links below. They are listed in order of priority:

1. EU Grant Agreement, including the DoA– annex 1 to the GA
2. Consortium Agreement
3. EU guidelines for project implementation and documentation:
    a. Annotated Grant Agreement, including annex 5 - specific rules
    b. Online manual
4. This PM handbook

All important information, like the official documents mentioned above, can also be found on the project's dedicated SharePoint site (see 4.3.1).

2. Project Overview

The overall project workplan is broken down into **7 work packages** (WP's). Each WP contains a set of detailed tasks, deliverables and milestones.

Deliverables are specific outputs (often written reports) that are produced during the project life cycle by the responsible lead beneficiary, and are submitted to the European Commission (EC) by the Scientific Coordinator (SCo), in accordance with the timing and conditions set out in annex 1 to the GA. **Milestones** are project check points that help to monitor the progress. They may correspond to the completion of a WP or a key deliverable, allowing the next phase of the project work to begin.

The detailed timing of the internal review process prior to submission of the deliverable or the completion of milestones is set out in section 5.3 of this document.

3. Project governance

3.1 Management structure

The management structure comprises several governing bodies, as illustrated in figure 1.

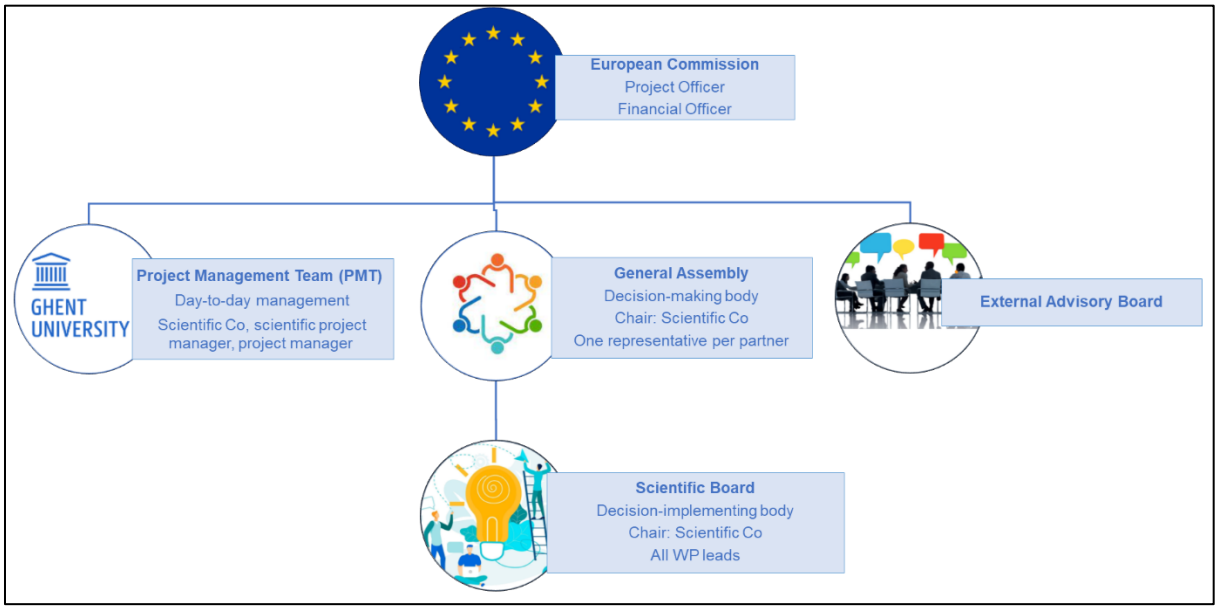

Figure 1: Overview of management structure

3.1.1 European Commission - Project Officer

The Granting Authority is represented by a dedicated project officer (PO). For this project the responsible PO is **Rebecca Kanellea**. She oversees the scientific and technical progress of the project and is the single point of contact for any issue (scientific, technical, legal, financial…) the consortium may encounter during the project.

Only the Scientific Coordinator, or by delegation, the project manager, can communicate directly with the PO through the communication channel in the Funding & Tenders portal.

3.1.2 Project Management Team (PMT) UGent

1. **Scientific coordinator**
   Professor **Arnold Janssens** is the scientific coordinator. He is in charge of the overall scientific development of the project. His main responsibilities are to ensure that the principal goals of the project are obtained, and to verify the quality of all deliverables resulting from the project.

2. **Scientific project manager**
   Dr. **Eline Himpe** is the scientific manager. She is responsible for the day-to-day scientific administration of the project and assists the scientific coordinator in obtaining the project's goals.

During her maternity leave she will be replaced by dr. **Klaas De Jonge**.

3. **EU Project manager**
   Marianne Van Lancker is the assigned EU project manager. She assists the scientific coordinator and scientific project manager in overseeing the project lifecycle, monitoring deadlines, coordinating reporting, supporting in administrative, legal and financial issues and liaising with the PO.

3.1.3 General Assembly (GA)

The General Assembly, chaired by prof. Janssens, is the overall decision-making body of the project and consists of one representative per beneficiary who has the authority to take decisions on behalf of its respective organisation. The chairperson shall convene ordinary meetings of the General Assembly at least every six (6) months, or when decisions cannot wait.

The General Assembly can initiate proposals and take decisions in the interest of the project, for example regarding changes in the content, finances or intellectual property rights. It has the sole authority to decide on adaptations of the CA and/or requests for amendments. All proposals for changes to the workplan made by the Scientific Board must be approved by the General Assembly.

The responsibilities of the General Assembly are detailed in section 6 of the CA.

Beneficiary	Member of the GA	Substitute
UGent	Arnold Janssens	Eline Himpe/ Klaas De Jonge
TALTECH	Paul Klõšeiko	Targo Kalamees
KU Leuven	Lieve Helsen	Glenn Reynders
SINTEF	Nicola Lolli	Berit Time
EURAC	Alexandra Troi	Annamaria Belleri
NIKU	Cecilie Flyen	Anne-Cathrine Flyen
POLIMI	Valeria Pracchi	Alessia Buda
GENT	Mira Van Olmen	Christel Kinnaer

MSK	Ullar Alev	Laura Ingerpuu
ACE	Gloria Oddo	Larissa De Rosso
ZH	Alessandro Miglioli	Claudio Del Pero
Builtwins BV	Filip Jorissen	Damien Picard
LGI	Thomas Judes	Pauline Assadi
SWECO BELGIUM	Wim Boydens	Ann Bruggeman
Sweco Finland	Kari Nöjd	Juho Rinta-Rahko
Sakret	Rene Vinkler	Teele Pullisaar
DENYS	Frank Deblauwer	Nathan Van den Bossche

3.1.4 Scientific Board (SB)

The Scientific Board is the decision-implementing body responsible for managing the daily aspects of the project. It is composed by the work package leaders (WPL's), one additional partner and chaired by the scientific coordinator. Depending on the agenda, also other consortium members are welcome to join the meeting.

During the Scientific Board meetings, they exchange, collaborate and discuss cross-work package aspects of the work plan in order to assure the technical progress of the project of the highest quality. The Scientific Board meets in principle every 6 months or when issues require an ad hoc meeting.

The WPL's maintain close and frequent contact with the consortium members involved in their work package, and are responsible for a proper execution of the tasks, deliverables and milestones.

WP nr	WP Lead	Member	Substitute
1	UGent	Eline Himpe	Arnold Janssens

2	TALTECH	Targo Kalamees	Paul Klõšeiko
3	UGent	Arnold Janssens	Eline Himpe
4	KU Leuven	Lieve Helsen	Glenn Reynders
5	NIKU	Cecilie Flyen	Anne-Cathrine Flyen
/	SINTEF	Nicola Lolli	Berit Time
6	POLIMI	Valeria Pracchi	Alessia Buda
7	ACE	Gloria Oddo	Larissa De Rosso

3.1.5 External Advisory Board (EAB)

The External Advisory Board comprises a high-level international panel of independent experts from different areas of knowledge that will provide an additional form of quality control, advice, and validation of the vision, global impact and outreach of the project.

By incorporating feedback of the External Advisory Board during the project, the consortium will be able to anticipate potential new developments and adapt its action lines accordingly. Work package leaders can involve representatives of relevant sections of the External Advisory Board in their panels and workshops and the Scientific Board can invite them to their meetings as needed.

3.2 Decision-making

Consensus will always be pursued as preferred method to make decisions within the consortium. Voting mechanisms will only be used as a last resort, if a consensus cannot be reached. There will be an active effort to resolve conflicts at their respective level. If needed, the Scientific coordinator will facilitate additional discussion and conflict resolution. If no resolution can be achieved, the issue will be referred to the General Assembly for a final decision.

A consortium body can deliberate and decide validly when two-thirds (2/3) of its members is present or represented (quorum). Each member represented in the meeting has one vote. Decisions are taken by a majority of two-thirds (2/3) of the votes cast.

The voting procedures are detailed and formally agreed upon in section 6 of the CA.

4. Collaboration & Internal communication

4.1 Contact list

A detailed contact list of the consortium members can be consulted on the project's SharePoint site (see section 4.3.1). Next to the contact details, the list also shows the specific roles of individual consortium members, as well as their membership of the different governing bodies.

It is the responsibility of each beneficiary to indicate any changes to this information as soon as possible to the PM, so the list can be kept up to date. Required changes can be sent to marianne.vanlancker@ugent.be.

4.2 Meetings

4.2.1 Types and frequency

Type	Frequency	Who?	How?
PMT meeting	Weekly, or upon request team member	PMT	Online
SB meeting	Every 6 months, or upon written request	WP leads	Online
General assembly	Every 6 months, or upon written request	Appointed representatives	Live/Online
Consortium meeting	Bi-Annual	Consortium members	Live/online
EAB meeting	To be invited to meetings as needed	Consortium + AB members	Live/Online
WP meetings	Regular meetings at the discretion of the WPL	WP members + scientific project manager if needed	Online

Table 1: governance bodies and meeting frequency

4.2.2 Consortium meetings

There are eight **consortium meetings** (live or online) scheduled. These are formal meetings hosted by one of the consortium members, and includes a General Assembly and Scientific Board meeting. The timing of the meeting is linked to important milestones in the project life cycle.

Meeting	When	Where	Organizing Beneficiary
Consortium Meeting 1	5/6 February 2024	Ghent (BE)	UGent
Consortium Meeting 2	Sep-Oct 2024	Norway (tbc)	SINTEF (tbc)
Consortium Meeting 3	Feb-Apr 2025	Estonia or Belgium	TALTECH/KULeuven(+SWECO-BE) (tbd)
Consortium Meeting 4	Sep-Oct 2025	Online meeting	UGent

Consortium Meeting 5	Feb-Apr 2026	Belgium or Estonia	KULeuven(+SWECO-BE)/TALTECH (tbd)
Consortium Meeting 6	Sep-Oct 2026	Online meeting	UGent
Consortium Meeting 7	Feb-Mar 2027	Italy	POLIMI&ZH(+EURAC)
Consortium meeting 8 (~final conference)	Sep-Oct 2027	Tbd	tbd

Table 2: details of consortium meetings

4.3 Internal communication

4.3.1 Online collaboration platform: SharePoint

A Project SharePoint site is available as a repository and collaboration instrument for all working documents, minutes and reports. Every consortium member has access to the site but depending on their role in the project, they can be given different permissions.

More information regarding the use of SharePoint is available here.

4.3.2 Online meeting & communication tool

Virtual meetings will preferably be organised with MS Teams. Teams is integrated in Office 365, which means that you can work with familiar Office programs such as Word, Excel and PowerPoint.

4.3.3 E-mail

The project will use an individualised email address for correspondence: HeriTACE@UGent.be.

To help quickly recognise project related emails a standard subject title is proposed. Project related e-mails should include in the subject title: **HeriTACE** and WP number (if applicable) followed by a more specific description of the subject.

*[Subject: **HeriTACE** Kick off meeting minutes]*

If you want feedback on a document, avoid attachments and preferably use links to documents on the Project SharePoint instead.

4.3.4 File naming conventions

To ensure efficient file management, all public documents need to conform with the following document standard:

- Deliverable documents:
  HeriTACE_Dx.y_Title_v0.1
- Meeting documents:

HeriTACE_YYYYMMDD (date meeting)_ Type of Meeting_Location_ Type of Doc_v0.1

- Conference presentations:
  HeriTACE_ YYYYMMDD (date event)_Event_Location_ Initials/Organisation_v0.1

It is advisable to also apply this standard for internal project documents, such as WP-meeting agenda's and minutes, milestone reports, etc.…

Consecutive versions of a draft document get the suffix v0.1, v0.2 – once the document is considered final it is given the suffix v1.0. Changes in consecutive versions should be briefly mentioned in the History of changes.

4.3.5 Templates

All document templates (for deliverables, presentations, document standard,…) are available on the Project SharePoint site.

On SharePoint you can find the standard PowerPoint presentation that can be used in external communication purposes, such as presentations at conferences, policy events, etc…

5. Reporting

5.1 Overview

There are several reporting periods and deadlines throughout the project life cycle. Some are officially set by the EC, others are agreed upon by the Consortium and allow for adequate monitoring of the project's technical progress and budgetary status.

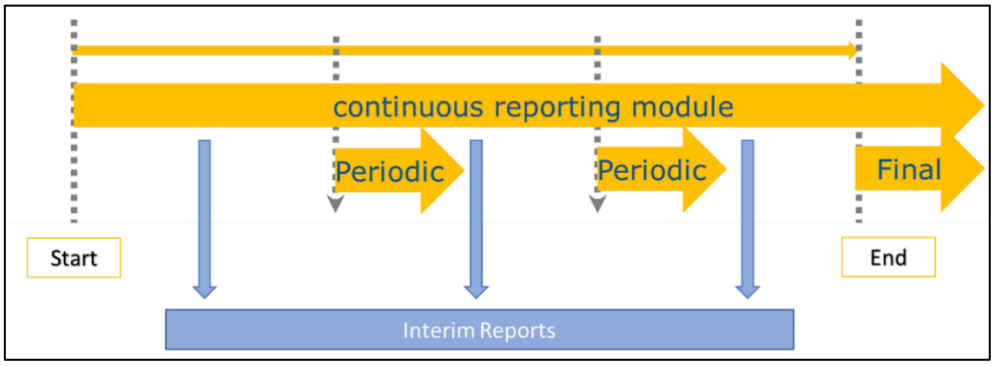

Figure 2: reporting flow

5.2 Reporting horizontal issues

At the beginning of the project the continuous reporting module is activated in the Funding and Tenders Portal (F&T Portal) which can be updated on an ongoing basis. The information automatically feeds into Part A of the periodic technical reports (see 5.5).

Figure 3: different sections of continuous reporting in the F&T Portal

5.3 Reporting of deliverables and milestones

The continuous reporting module is also permanently open to submit deliverables and to report on progress in achieving milestones.

WPL's are responsible for the timely reporting of their **WP deliverables**. The quality of the deliverables is the responsibility of the Deliverable Lead (author). In order to guarantee the highest standard of excellence, a quality review process precedes the submission of the deliverable.

Once a year, during the live consortium meeting, the responsible lead for the review for deliverables due, will be appointed by the consortium. The overview is available on the Project SharePoint site.

There is a template on Project SharePoint site available for the reporting of deliverables, and an indicative step-by-step review process.

	Action
Annual consortium meeting	An internal reviewer will be appointed for each deliverable in the upcoming project year.
31 days before submission date	Author sends the first draft version of the deliverable to the WPL (first reader), the internal reviewer (second reader), the Scientific coordinator and the PM for revision.
20 days before submission date	The WPL and the internal reviewer review the deliverable separately and send their comments to Author. Author adjusts the deliverable where necessary.
10 days before submission date	Author sends the second draft version of the deliverable to the Scientific coordinator and the PM.
7 days before submission date	Scientific coordinator does a final check.
Submission date (at the latest)	The PM uploads the final document to the F&T Portal and the SharePoint site.

Table 3: Steps in quality review of deliverables

The dissemination level of deliverables varies between public and confidential. Public deliverables will be made available for the general public through different communication channels and will automatically be published on CORDIS by the EC. Confidential deliverables are only shared with the members of the consortium and the EC services.

For the reporting of the **milestones**, an internal report needs to be submitted to the Scientific coordinator and PM, by the due date set out in in Annex 1 of the GA. Milestone

reports can be short (e-mail) but should provide evidence that the milestone has been completed. The PM will then mark the milestone as achieved in the F&T Portal.

5.4 Interim reports

5.4.1 Technical progress report

The technical progress report monitors the project's **scientific and technical progress per work package**. It is an **internal** report that is not sent to the EC. The report is conceived as a structured PowerPoint presentation where WPL's can give an update of their work package (status of the tasks, deliverables and milestones, report on deviations,…).

For each WP a template will be made available in the reporting section on the Project SharePoint site It entails a brief summary of the scientific work completed as well as a brief explanation of any deviations from the DoA – annex1 to the GA.

The WPL's are responsible for updating the presentation **every six months, prior to the scientific board and consortium meeting,** so that it can be put on the agenda of the Scientific Board for discussion. The information gathered will serve as basis for part B of the periodic technical report.

5.4.2 Financial progress report

The financial progress report monitors the **project's financial progress per beneficiary**. It is an **internal** document that is not sent to the EC. The objective is to ensure that project spending is in line with technical progress, to track spending against budget and to detect deviations in an early stage.

It contains a financial overview as well as a brief explanation of any deviations from the original budget. Each beneficiary is responsible for compiling its financial report **every nine tot twelve months** and sending it to the PMT. The PM consolidates the financial data and generate a resource overview.

The Excel template for the financial progress report can be found in the reporting section on the Project SharePoint site.

5.5 Periodic reporting

During the lifecycle of the project there are **3 contractually foreseen reporting periods** (RP's) to the EC.

Reporting Period No.	From Month	To Month	Duration	Start date	End date
1	1	18	18	01/01/2024	30/06/2025
2	19	30	12	01/07/2025	30/06/2026
3	31	48	18	01/07/2026	31/12/2027

Figure 3: different sections of continuous reporting in the F&T Portal

According to paragraph 4.2 of the Data Sheet in the GA, the periodic report must be submitted to the EC by the Scientific coordinator within 60 days following the end of each reporting period.

The periodic report consists of a technical report and a financial report. A module is made available in the F&T Portal at the end of each RP. The Scientific coordinator receives an automatic portal notification at the start of the process.

The **technical report** consists of two parts:

- **Part A** is automatically generated by the system. It is built on the information entered by the PM (based on the input of the beneficiaries) via the continuous reporting module of the F&T Portal.

- **Part B** is the narrative part that includes explanations of the work carried out by the beneficiaries and linked third parties during the reporting period. It is to be uploaded by the Scientific coordinator as a single PDF document, following the template of Part B periodic technical report.

The **periodic financial report** consists of an individual financial statement for each beneficiary (and third party) for the RP concerned. They must declare all eligible costs, even if costs exceed the amounts indicated in the estimated budget.

Guidelines to perform this financial reporting can be found in the dedicated section of the Project SharePoint site.

5.6 Review meetings

After each periodic reporting the EC will organise a one-day (online) review meeting, attended by the PO, external experts, the coordinator and the relevant WPL's. The goal is to evaluate the project scientific and financial progress and achievements of the last reporting period. In some cases additional reviews can be scheduled by the PO, to deal with specific issues.

6. Audits and record keeping

6.1 Audits

Two types of audits can occur:

1. **Certificate on the financial statement** (CFS) at the end of the project, whenever a beneficiary claims more than 430.000 EUR as total EU contribution. The beneficiary concerned needs to have a qualified approved external auditor control all its actual costs claimed. The auditor produces a report using the template available on Portal Reference Documents. This needs to be uploaded with the financial statement in the final report. The cost for this audit is eligible.
2. An **audit** of a beneficiary by the EC (or one of its bodies).
   This generally concerns more than one project, and can cover one or more reporting periods. These audits can occur up until 2 years after the final payment. Beneficiaries are selected randomly.

6.2 Record keeping

All documentation needs to be kept for 5 years after the final payment by the EC. This concerns amongst others invoices, timesheets, salary slips, employment contracts, agendas, minutes, logbooks, proofs of payment, … (see also Financial Reporting Guidelines). Relevant documentation needs to be provided to the auditor during a CFS or an audit by the EC. This is not required at reporting.

7. Financial matters

7.1 Payments

The maximum EC contribution cannot be exceeded. Even if the eligible costs of the project turn out to be higher than planned, no additional funding is possible.

The EC will make the following payments to the coordinator:

- **Pre-financing** at the start of the project. The amount is defined in the GA.
  Pre-financing funds remain EC property until they are 'cleared' against eligible costs accepted by the EC.
  5% of the maximum grant is retained by the EC for the Mutual Insurance Mechanism. It is returned to the consortium with the final payment.
- **Interim payment** following the approval of the periodic reports. The amount will be based on the eligible costs reported and accepted during that period. However, the combined pre-financing and interim payments are limited to 85% of the EC grant amount.
- **Final payment** following the approval of the final report. The amount consists of the difference between the calculated EC contribution (on the basis of the eligible costs) minus the amounts already paid.

The coordinator will distribute the funds between the beneficiaries without unjustified delay according to the principles set out in the CA.

8. Communication and dissemination

8.1 External communication

External communication is directed towards parties outside the consortium, target groups of the project, stakeholders and the PO. The external communication is part of **WP7 'Communication and Dissemination'**. You can find more information in the **Communication and Dissemination Plan**.

6.1.1 General requirements

It is required to indicate at all times that the project has received EU funding, using the following:

- Display the **EU emblem** (When displayed together with another logo, the EU emblem must have appropriate prominence)

- Add the **disclaimer:**

'Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or [name of the granting authority]. Neither the European Union nor the granting authority can be held responsible for them.'

Different formats of the logo can be downloaded here.

Also include the **project logo**. You can find the logo in different formats on the Project SharePoint site.It is recommended to always place the project logo on the front page of the document and the EU logo at the left side of the footer of the first page in the document.

6.1.2 Project website

The project website, www.heritace.eu is set up for external communication purposes. The project website contains information about the project, its objectives, results, beneficiaries and events.

6.2 Dissemination

Project beneficiaries must as soon as possible (but not before a decision on their possible protection), disseminate their results. Some of the classic forms of dissemination are:

- Peer reviewed publication (open access)
- Presentation at a scientific conference
- Policy briefs
- Practice Abstracts (if applicable)
- ….

The dissemination measures should be consistent with the **Communication and Dissemination Plan** and proportionate to the impact expected from the action. When deciding on dissemination activities, the beneficiaries must also consider the other beneficiary's legitimate interests.

The complete rules for dissemination are covered in Section 8.3 of the CA and Article 17 and Annex 5 (specific rules) of the GA.

9. Publications

9.2 Guidelines for publication

A beneficiary wishing to publish, present or disclose information about the project must follow the following procedure:

- Notify the coordinator, the relevant partners (including the partner responsible for communication and dissemination) via e-mail at least 45 calendar days before publication/disclosure of information via filled out 'Intention to publish' document (guidelines and template).
- Any objections to the planned publication can be made within 30 calendar days after receipt of the notice. If no objection is made within this time limit, the publication is permitted.
- An objection is justified if:
    - the objecting party's legitimate academic or commercial interests in relation to the results or background would be significantly harmed;
    - the projection of the objecting party's results or background is adversely affected
- The objection has to include a precise request for necessary modifications.
- The objecting beneficiary can request a publication delay of not more than 45 calendar days from the time it raises such an objection. After 45 calendar days the publication is permitted, provided that Confidential information has been removed from the publication as indicated by the objecting beneficiary.

A beneficiary shall not include in any dissemination activity another beneficiary's results or background without obtaining written approval, unless they are already published.

The author informs the Scientific coordinator when the planned publication has been accepted for publishing (for monitoring proposes).

9.3 Open access to scientific publications

Each beneficiary must ensure open access (free of charge online access for any user) to all peer- reviewed scientific publications relating to its results (Art 17 and Annex 5 of the GA).

In particular, the beneficiary must:

- As soon as possible and at the latest on publication, deposit a machine-readable electronic copy of the published version or final peer-reviewed manuscript accepted for publication in a repository for scientific publications (institutional or e.g. OpenAIRE).
- Aim to deposit at the same time the research data needed to validate the results presented in the deposited scientific publications.
- Ensure immediate open access to the deposited publication via the repository

- Ensure open access, via the repository, to the bibliographic metadata that identify the deposited publication. The bibliographic metadata must be in a standard format and must include all of the following:
    - the terms "European Union (EU)" and "Horizon Europe"
    - the name of the action, acronym and grant number
    - the publication date
    - a persistent identifier

Green OA (self-archiving) is possible as long as the publisher does not impose an embargo, and allows to make the published version or the final peer-reviewed manuscript publicly available in a repository. **Gold OA** is possible by publishing in an Open Access Journal – the article processing charge (ACP) that some journals ask is an eligible cost. An ACP of a Hybrid Open Access Journal is NOT an eligible cost.

Open Research Europe is an open access publishing platform for the publication of research stemming from EU funding. The platform makes it easy for beneficiaries to comply with the open access terms and offers researchers a publishing venue to share their results and insights rapidly. It is free of charge.

Both deposited scientific publications and datasets have to be listed in the F&T Portal, under the Continuous reporting section. When they have been linked to the project properly, they will be automatically displayed here as 'suggested by OpenAIRE'.

9.4 Data Management Plan

A Data Management Plan (DMP) will be developed, considering the FAIR principles and following guidelines of OpenAIRE. The DMP will be established in close collaboration with all WPs.

The DMP will be submitted in M6 (D1.2) and will be updated through the project lifetime and at least before every periodic review (M30 D1.3; M48 D1.4). Data from interviews, surveys, observations, process data, etc. will be collected, stored in alignment with the GDPR. A template for informed consent will be made available on the Project SharePoint (> templates). All data should be pseudonymized or anonymized so that these data are easier to share/publish.

10. Exploitation of project results

The obligations towards IPR, access rights and rights of use are described in art 16 and Annex 5 of the GA. Beneficiaries must – up to four years after the end of the action - use their best efforts to exploit their results.

If, despite a beneficiary's best efforts, the results are not exploited within one year after the end of the project, the beneficiaries must (unless otherwise agreed in writing with the EC) use the Horizon Results Platform to find interested parties to exploit the results.

At the end of the project, the beneficiaries must indicate the owner(s) of the results (Results Ownership List) in the final periodic report. The roadmap for the exploitation of project results will be described in **D6.1' Plan for dissemination & exploitation including communication activities',** due in M6.

11. Ethics and research integrity

The beneficiaries must carry out the action in compliance with ethical principles (including the highest standards of research integrity) and with the applicable international, EU and national law. The rules on Ethics and Research Integrity can be found in Annex 5 of the Grant Agreement. This includes the ethics issues identified in the Ethics Summary Report and any additional ethics issues that emerge in the course of the grant. For each issue applicable, beneficiaries must follow the guidance provided in the How to complete your ethics self-assessment.