transformer

Project Management Plan

Version 2

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Abstract

The Project Management Plan summarises the overall management and internal reporting procedures ensuring close cooperation and integration of different WPs and project activities.

Project Partners

Organisation	Country	Abbreviation
RUHR-UNIVERSITAET BOCHUM	DE	*RUB*
RUPPRECHT CONSULT-FORSCHUNG & BERATUNG GMBH	DE	*RC*
BUSINESS METROPOLE RUHR GMBH	DE	*BMR*
REGIONE EMILIA ROMAGNA	IT	*RER*
FONDAZIONE ISTITUTO SUI TRASPORTI E LA LOGISTICA	IT	*ITL*
FIT CONSULTING SRL	IT	*FIT*
Dolnoslaski Fundusz Rozwoju sp. z o.o.	PL	*DFR*
UNIWERSYTET WARSZAWSKI	PL	*Uni Warsaw*
Fundacja Dumni z Lubina	PL	*Dumni z Lubina*
ANKO DYTIKIS MAKEDONIAS A.E. - ANAPTYXIAKOS ORGANISMOS TOPIKIS AFTODIIKISIS	GR	*ANKO*
ETHNIKO KENTRO EREVNAS KAI TECHNOLOGIKIS ANAPTYXIS	GR	*CERTH*
TWENTY COMMUNICATIONS SRO	SK	*TWE*
EUROPEAN NETWORK OF LIVING LABS IVZW	BE	*ENoLL*

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Dissemination Level: WPL = Work Package Leader, PM = Project Manager, PC = Project Coordinator, PO = Project Officer

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Abbreviations

Abbreviations	Definition
CA	Consortium Agreement
DE	Germany
DoA	Description of Actions
EU	European Union
GA	General Assembly
GDPR	General Data Protection Regulation
GR	Greece
IT	Italy
KPIs	Key Performance Indicators
PC	Project Coordinator/Coordination
PL	Poland
PM	Project Manager/Management
RC	Rupprecht Consult
RUB	Ruhr Universität Bochum
TSL	Transition Super-Lab
WP	Work Package
WPL	Work Package Leader

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Executive Summary

This document of the Project Management Plan summarises the key project elements necessary to ensure the successful implementation of the project and fulfilment of all project objectives, overall management, and internal reporting procedures, ensuring close cooperation and integration of different WPs and project activities. This document, written in the framework of WP1, guarantees the quality and timely delivery of the project deliverables, fulfilling administrative, financial, and contractual obligations. The document, therefore, outlines the Project Management Plan with a detailed schedule per task, responsible partner-related subtasks, related deliverables, and dependencies on other tasks.

The document outlines the project management structure which provides a solid and consistent foundation and an efficient interface for the consortium partners.

This deliverable provides an update on the project management plan delivered in Month 2 of the project.

Chapter 1: Introduction

Climate change is the big challenge our generation is facing. To reach the ambitious goals set by the Paris Agreement and the European Green Deal, a radical transformation of the EU's economy is urgent. The ambition of the TRANSFORMER project is to design long-term systemic transformation frameworks for regions across Europe to accelerate the shift towards climate neutrality. TRANSFORMER takes up this challenge by applying the Transition Super-Lab (TSL) approach as very-large territory initiatives of real-life management of the transition from typical fossil-fuel-based local economies to zero-carbon ones. The project will develop a roadmap blueprint, a toolkit (incl. matchmaking mechanisms) and a knowledge hub, to support the pilot regions but also to be applied by other regions across Europe. Moreover, an evaluation framework will be developed to evaluate the impact of TSLs in the TRANSFORMER pilot regions of Ruhr (Germany), Emilia-Romagna (Italy), Lower Silesia (Poland) and Western Macedonia (Greece), as well as the respective tools and structures applied by the pilot regions.

The project Management Plan covers aspects related to the project's structure in terms of organisation, project procedures, communication strategy, reporting steps within the consortium and quality assurance procedures to make sure that the goal of the project is reached within the stipulated time meeting all the predefined requirements. This deliverable provides an update on the project management plan delivered in Month 2 of the project.

Chapter 2: Project Management Structure

Management Structure

The consortium and management structure will promote the optimal use of the knowledge, experience, and expertise of the partners in fulfilling objectives while providing effective project monitoring and control. The management structure of TRANSFORMER means to ensure effective and efficient coordination of the partners and the execution of the work packages. This structure is based on the principle of shared responsibility among consortium partners in the management group and enables effective monitoring of project progress and work planning including full compliance with schedule, milestones, and deliverables. The management structure identifies the roles and responsibilities of the various entities in the project as well as optimising communication between the different partners, the Project Coordinator, the work package leaders, and the task leaders.

Roles and responsibilities

The breakdown of the management structure is as follows:

General Assembly: The General Assembly (GA) is the decision-making body of the consortium. The General Assembly shall consist of one representative of each Party. Each Member shall be deemed to be duly authorised to deliberate, negotiate, and decide on all matters listed in this Consortium Agreement.

The General Assembly shall be free to act on its initiative to formulate proposals and take decisions in accordance with the procedures set out. The GA shall be responsible for changes in proposals, consortium plan and any modification or withdrawal of Background.

Project Coordinator: The coordinator, Ruhr-Universitaet Bochum (RUB), will set up and ensure sound lines of communication between all project partners and will act as the interface between the EC and the consortium partners for the smooth running of the project. It will handle project correspondence and day-to-day requests from partners, monitoring partners' project activities and overall compliance with the project's time plan and partners' obligations under the Grant Agreement (GA) and Consortium Agreement (CA). RUB will be responsible for all activities related to the financial management of the project.

The coordinator will be responsible for proposing decisions and chairing the meetings. The Project Coordinator is supported by the Project Manager as included in the Grant Agreement.

Project Manager: The Project Manager, Rupprecht Consult (RC) is the leader of task 1.2 "Project management, reporting and project meetings" and task 1.4 "Risk management", and will support the PC in task 1.1 "Project coordination, financial and contract management" and task 1.3 "Quality control". RC will monitor the process of project implementation and the compliance of progress with the work plan as described in the DoA, esp. from a content perspective.

RC will also implement an efficient overall management and internal reporting mechanism ensuring close cooperation and integration of different WPs and project activities. RUB, supported by RC will not only coordinate and support the preparation of project deliverables and key public documents but will also set up an internal quality control system. RC will be responsible for the coordination of identifying risks at the project level, and by regularly monitoring them prevent as many as possible risks that develop into implementation barriers. With support from RUB, RC will make sure that swift and immediate action will be taken to address and solve risks as early as possible.

The Project Manager will be responsible for preparing the meetings, preparing the agenda of General Assembly meetings (with the support of the Project Coordinator), preparing the minutes of the meetings, monitoring the implementation of decisions taken at meetings and transmitting promptly documents and information connected with the Project to any other Party concerned. The Project Manager is supporting the Project Coordinator as included in the Grant Agreement.

Support for project work & internal communication

To achieve the project's objectives, TRANSFORMER will ensure a successful collaboration which is highly dependent on good communication on all levels. Effective communication is a key factor for the project to accomplish its work on transition super labs. The communication activities provide the framework to manage and coordinate the wide variety of communications that take place during the project. TRANSFORMER intends to achieve frequent communication among consortium partners, stakeholders and experts in Europe while minimising travel costs and time.

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MS Teams

TRANSFORMER Teams is dedicated (1) to collaborative work between partners (e.g., collaboration on deliverables, storing documents, noting actions and tasks/to-dos etc.) and (2) as a communication platform, incl. messages relevant to all partners (e.g., from the coordinator), for discussions on the respective WP channels, chat etc.

Project meetings' agendas, minutes, templates, documents, recordings etc. are available through the various channels and folders of the TRANSFORMER [All Partners] Teams which links to the project MS SharePoint.

MS Teams enables online meetings with up to 300 participants also so-called "group rooms" so that meetings with 'Break-out Sessions' can be organised. The use of MS Teams is possible for the participants without installing client software. Only when using the browsers Firefox, Safari and Internet Explorer the installation of a desktop client is necessary for the use of some functions.

Workspace for collaboration: SharePoint

For collaborative online collaboration, we suggest using Microsoft SharePoint & Teams. Rupprecht Consult already uses this tool in more than 15 projects as a central project management and collaboration platform. Rupprecht Consult has a Microsoft Office 365 E3 license as well as an Enterprise Mobility & Security license for all internal users, which enables secure management of all products with multi-factor authentication.

The security and information protection features of Office 365 enable us to securely store and share data with colleagues, customers, and partners. You can flexibly determine who can access which data and what the person can do with it – for example, viewing and editing files, but not printing or forwarding. In addition, information protection includes backup and recovery capabilities, management rights, email and file loss protection, and threat management capabilities to detect and combat threats such as phishing, malware, malicious links, and more. Our IT management team constantly monitors compliance with security requirements and potential threats and conducts a weekly health check. In addition, our Microsoft contract guarantees that all data is stored on European servers in accordance with the EU General Data Protection Regulation (GDPR).

Rupprecht Consult has set up an internal cooperation group between Consortium partners for bilateral coordination and document exchange. The MS Teams group consists of a document repository (SharePoint), a chat channel and a separate OneNote, which we mainly use to keep and store minutes of project meetings. We would host the team group on our server for the entire duration of the project within the scope of our license.

In addition to the building blocks mentioned above, more can be added to the Teams group, depending on the needs of the Project Coordinator or project partners. Other possible building blocks include a project wiki, a shared calendar, a news page and RSS feeds (to relevant websites or social media).

In MS Teams, distribution groups can also be set up so that a message sent in the chat channel can be sent to all members of the distribution list, if desired, also by email. A distribution list can contain up to 3,500 members and up to 100 such distribution lists ("tags") can be set up per MS Teams group. Our license allows you to set up to 500,000 team pages. Up to 25 TB of data storage is available per page, and individual files can be up to 250 GB in size. Although the maximum storage volume of our company is 1.23 TB, this storage capacity is sufficient and available for the entire duration of the project. Up to 25,000 accounts can be set up per Teams group for the various project members. The MS Teams and SharePoint pages will remain available online until the project is completed, i.e., beyond the official duration of the project, until the final payment of CINEA has been received by the Project Coordinator and the coordinator has made the last payments to the individual project partners.

An internet-based collaboration and document-management platform will be set up together with facilities for online/telephone conferences. MS SharePoint will be used for internal project monitoring and publication of final reports and deliverables.

The **SharePoint** site is not only used for the online storage of documents but also enables joint work on individual documents so that different versions can be merged in a more time-saving and transparent manner. This will be a great relief, especially when preparing reports for the CINEA. Previous versions are continuously stored temporarily and can thus be viewed and restored at any time. Rupprecht Consult created the folder structure according to the project structure (work packages, tasks, meetings, etc.). During the project, it will be updated as needed, e.g., by creating drafts and archive folders for individual documents such as deliverables or reports. The project partners can thus always easily locate the current version of a document.
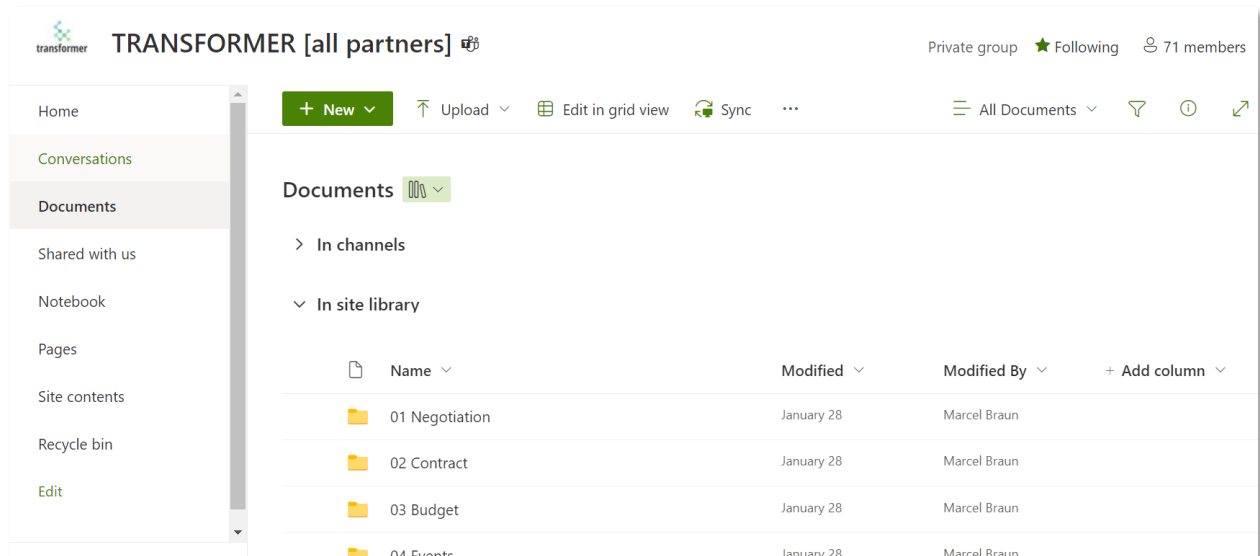
Figure 1: Example of the SharePoint Space

The chat channel enables internal communication between the partners and can thus replace the exchange via email as far as possible. The advantage is that all communication can be viewed and traced by all project partners via a central platform. Attachments can be directly attached to messages, remain available as a document, and can be easily found via the search function. Alternatively, chat messages can include internal links to documents already stored on SharePoint.

OneNote, integrated into MS Teams and MS Sharepoint, is an online notebook that can be divided into sections and pages. We propose keeping the minutes of the project meetings in OneNote. This makes them available to all project partners and enables them to quickly find agreements that are created in to-do lists via the search function. These would then be transferred to Asana tasks (see below) by RC as Project Managers.
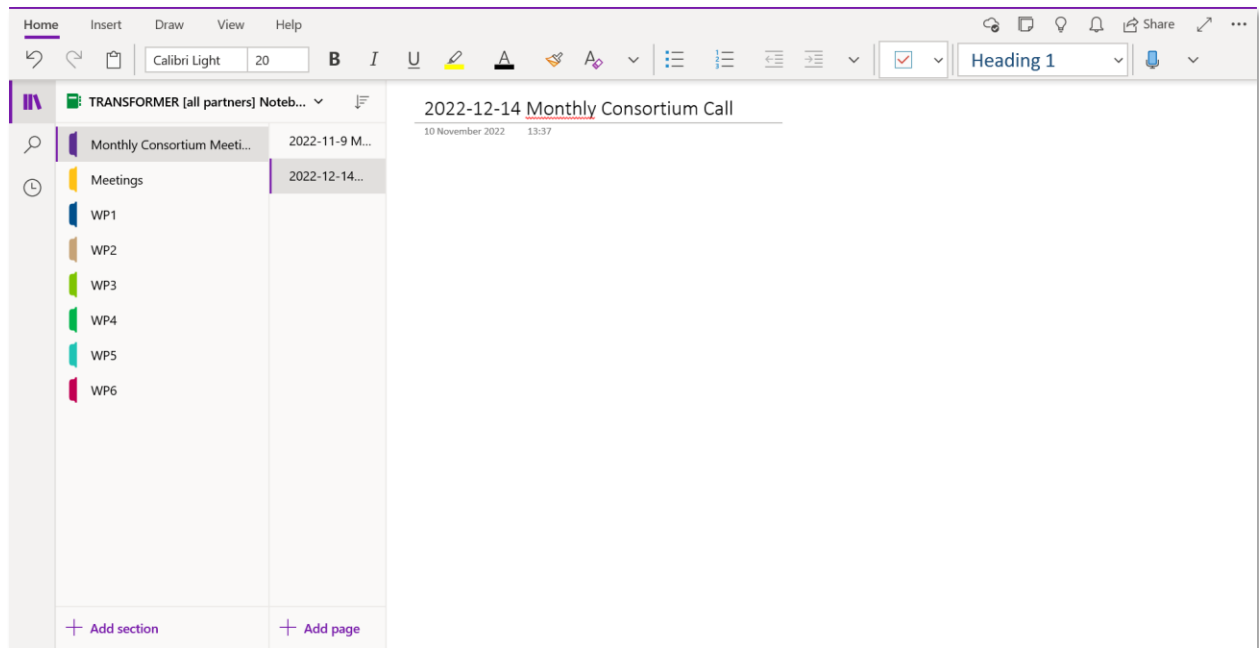
Figure 2: Example of the OneNote structure

Asana

In addition, we propose to use the software Asana for the organisation, tracking and management of individual and project tasks, which we have been successfully using since 2016 for team collaboration and work management, both in-house and increasingly also in external project work. Rupprecht Consult has a Business License with Premium Extension, which allows us to make the use of Asana available to all project staff. Our Asana license allows unlimited numbers of people to participate in a single project, each with its own access password. Asana is completely browser-based and requires no installation of client software or Add-ons.

The premium extension offers several additional features, such as:

- Set start dates that indicate when to start work on specific tasks to meet deadlines without last-minute stress
- Definition of milestones
- Creating a Gantt chart
- Integration of user-defined fields such as drop-down, number or text fields to consistently record the processing status of tasks and to track the status and sort and filter information
- Definition of task dependencies, i.e. marking a task waiting for another task
- Status updates shared with all stakeholders
- Dashboard with exportable real-time diagrams that can be downloaded as PNG and can be used to identify obstacles or planning errors
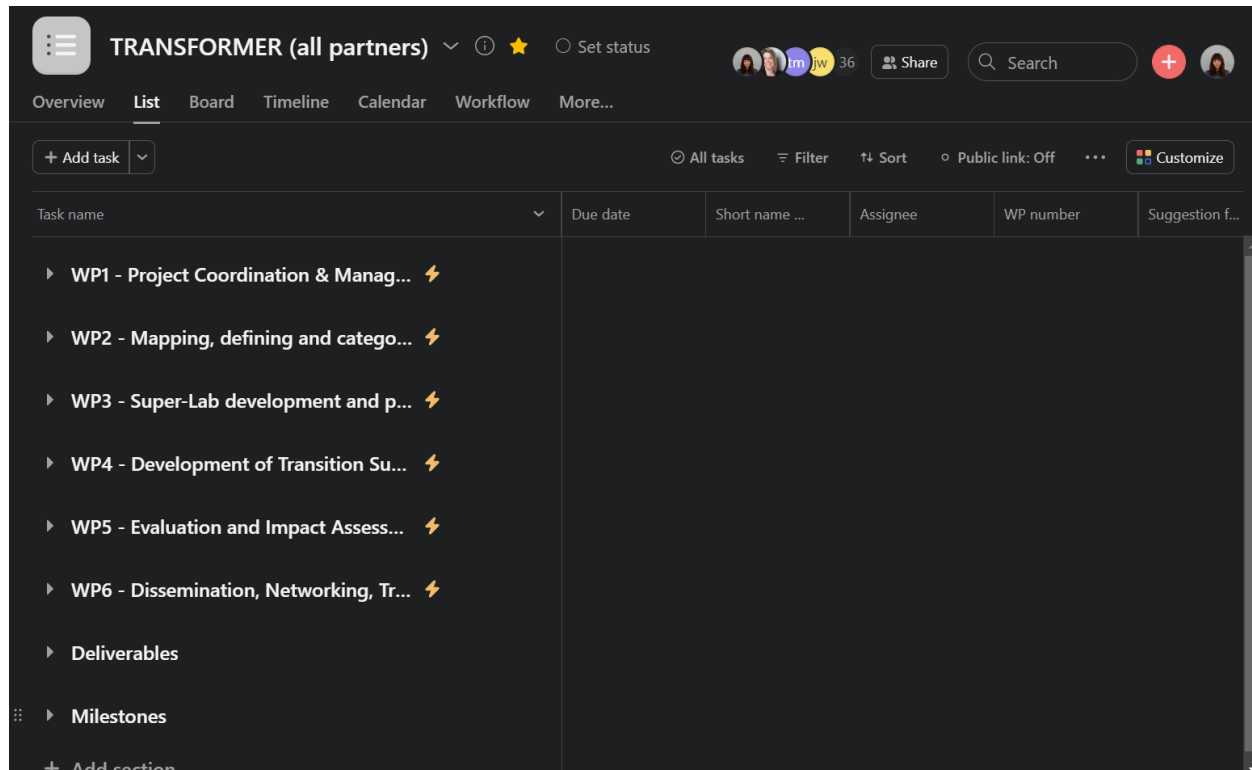
Figure 3: Example of the Asana Structure

For the organisation of the workflow and the targeted assignment of tasks according to responsibility and deadlines, we propose to use the task management system, Asana.

At the beginning of the project, Rupprecht Consult will set up the Asana structure according to the project tasks and events (milestones, deliverables, meetings, etc.) defined in the Grant Agreement and project Gantt chart. The individual tasks are then further managed by the appropriate people responsible for completing a task. For this purpose, several subtasks can be defined and distributed to different project members, so that the work steps to complete an important project task can be planned and agreed upon at an early stage. A section for follow-up actions after Consortium meetings to ensure that actions decided by the GA are taken up by the respective partners before the next consortium meeting.

Asana enables all project members to always have an overview of all pending tasks, deadlines and the current processing status. For each task, additional agents can be defined, who are then automatically informed about each update in Asana. The status of tasks can also be communicated, and file attachments can be added to tasks.

Use of Miro

The utilisation of Miro as a powerful collaborative tool was chosen to enhance the overall project efficiency. Miro has been effectively employed to establish and manage linkages between various tasks and work packages, thereby fostering further coordination and communication among team members. By leveraging Miro's interactive features, the project team has been able to further detail the Gantt chart and work plan, ensuring comprehensive project visibility and clarity for all partners.

One of the primary advantages of utilizing Miro lies in its ability to provide a platform for visualizing the intricate relationships and dependencies among different project elements. Through the use of visual boards and customizable templates, the team has been able to create a more holistic overview of the project's progress, highlighting critical milestones and their respective timelines. This visual representation has aided in identifying potential bottlenecks and facilitating proactive decision-making.

Moreover, Miro has played a supporting role in defining key concepts and terminologies specific to the project. By creating dedicated digital whiteboards, the team has been able to collaboratively brainstorm and document essential definitions, ensuring a shared understanding of crucial project components. This comprehensive repository of knowledge can serve as a valuable resource for both new and existing team members, enabling efficient onboarding and fostering a cohesive working environment.

In summary, the incorporation of Miro as a collaborative tool within the project has enhanced the project's management. By visualizing linkages, detailing the Gantt chart and work plan, providing clear definitions of key concepts, and promoting collaboration, Miro has played a significant role in optimizing project outcomes and fostering a collaborative and informed project environment.

Contact List: Team monitoring and update

The Project Manager has compiled a contact list which is made up of researchers and administrative staff engaged in the project. This contact list is stored on SharePoint so that it is available to all project partners and can be updated by them. However, experience has shown that such lists are less likely to be updated by the project partners themselves. The Project Coordinator will immediately update the contact list whenever changes occur, both about their role in the project, as well as when staff members of partner organisations change. All consortium members must inform the Project Manager in a timely manner about such changes.

Chapter 3: Workplan

Work package list & leaders

The work package structure reflects TRANSFORMER's ambition to design long-term systemic transformation frameworks for regions across Europe to accelerate the shift towards climate neutrality. WP2 will provide the conceptual framework for the project by mapping, defining, and categorising Transition Super-Labs (TSLs). The actual development and implementation of TSLs will take place in WP3, piloted in four regions across Europe: the Ruhr Area, DE, Emilia Romagna, IT, Lower Silesia, PL and Western Macedonia, GR. WP4 will support the pilot regions and other regions in Europe by developing a roadmap blueprint, a toolkit (incl. matchmaking mechanisms) and a knowledge hub. WP5 will develop an evaluation framework and evaluate the impact of TSLs in the TRANSFORMER pilot regions, as well as the respective tools and structures applied by the pilot regions. WP6 will communicate and disseminate the (intermediate) results of the project and the activities in the pilot TSLs, provide a Hub with information and offer training and capacity-building activities for various target groups and stakeholders, and prepare an Exploitation Plan for a long-lasting impact of the project. Lastly, WP1 "Project Coordination & Management" will ensure high-quality implementation and outputs of the project. All depreciation costs for equipment, infrastructure or other assets in the project comply with Article 6 of the Grant Agreement and will be recorded in the appropriate beneficiary's accounts, purchased following Article 6.2.C of the Grant Agreement and written off following international accounting standards and beneficiary's usual accounting practices.

Table 1: Work package list & leaders

Task	Description	Lead	Start	Ends
WP1	Project Coordination & Management	RUB	M1	M24
WP2	Mapping, defining, and categorising Transition Super-Labs	RUB	M1	M24
WP3	Super Lab development and pilots	BMR	M1	M24
WP4	Development of Super Lab Toolkits, Knowledge Base & Roadmap Development	RC	M1	M24
WP5	Evaluation & Impact Assessment	CERTH	M1	M24
WP6	Dissemination, Networking, Training & Exploitation	TWE	M1	M24

Task breakdown

Table 2: Task List

| Task Number	Task Name	Beneficiary	Start Month	End Month
T1.1	Project coordination, financial and contract management	RUB	M1	M24
T1.2	Project management, reporting and project meetings	RC	M1	M24
T1.3	Quality control	RUB	M1	M24
T1.4	Risk management	RC	M1	M24
T2.1	Quantitative mapping of settings across Europe potentially benefitting the most from the transition super-labs approach (top-down)	RUB	M1	M6
T2.2	Mix-methods feasibility studies for the 4 TRANSFORMER Super-Labs (bottom-up)	RUB	M1	M9
T2.3	Conceptual framing of Transition Super Lab approach for regions	RUB	M1	M24
T3.1	Enabling coalitions and develop vision for super labs	BMR	M1	M6
T3.2	Setting-up super lab uses cases (feasibility studies/tests/experiments)	ENoLL	M3	M9
T3.3	Action Plan / programme (incl. financing and funding schemes for subsequent stage) development for super labs	BMR	M9	M20
T3.4	Monitoring and analysing success and failures in TSLs	CERTH	M12	M24
T4.1	Development of Super-Lab roadmap blueprint process to transition	RC	M1	M24
T4.2	Development of Transition Super-Lab Toolkit	FIT	M6	M24
T4.3	Development of a Super-Lab knowledge hub	CERTH	M6	M24
T5.1	Assessment framework for Transition Super-Labs	CERTH	M1	M22
T5.2	Impact Evaluation of TSLs pilots in regions	CERTH	M10	M22
T5.3	Tools and structures assessment	FIT	M10	M22
T6.1	Dissemination and communication	TWE	M1	M24
T6.2	Networking and Stakeholder Relationships	TWE	M1	M24
T6.3	TRANSFORMER Hub	TWE	M1	M24
T6.4	Training and capacity-building	RC	M1	M24
T6.5	Dissemination of Exploitable Results	TWE	M18	M24

Gantt Chart

The Gantt chart showing the list of the tasks and the milestones for this project are shown in Figure 4.

Figure 4: Gantt chart showing the details of the project.

Task	Description	Lead	Start	Ends
WP1	Project Coordination & Management	RUB	M1	M24
T1.1	Project coordination, financial and contract management	RUB	M2	M25
T1.2	Project management, reporting and project meetings	RC	M3	M26
T1.3	Quality control	RUB	M4	M27
T1.4	Risk management	RC	M5	M28
WP2	Mapping, defining, and categorising of Transition Super-Labs	RUB	M1	M24
T2.1	Quantitative mapping of settings across Europe potentially benefitting the most from the transition super-labs approach (top-	RUB	M1	M6
T2.2	Mix-methods feasibility studies for the 4 TRANSFORMER Super-Labs (bottom-up)	RUB	M1	M9
T2.3	Conceptual framing of Transition Super Lab approach for regions	RUB	M1	M24
WP3	Super Lab development and pilots	BMR	M1	M24
T3.1	Enabling coalitions and develop vision for super labs	BMR	M1	M6
T3.2	Setting-up super lab uses cases (feasibility studies/tests/experiments)	ENoLL	M3	M9
T3.3	Action Plan / programme (incl. financing and funding schemes for subsequent stage) development for super labs	BMR	M9	M20
T3.4	Monitoring and analysing success and failures in TSLs		M12	M24
WP4	Development of Super Lab Toolkits, Knowledge Base & Roadmap Development	RC	M1	M24
T4.1	Development of Super-Lab roadmap blueprint process to transition	RC	M1	M24
T4.2	Development of Transition Super-Lab Toolkit	FIT	M6	M24
T4.3	Development of a Super-Lab knowledge hub	CERTH	M6	M24
WP5	Evaluation & Impact Assessment	CERTH	M1	M22
T5.1	Assessment framework for Transition Super-Labs	CERTH	M1	M22
T5.2	Impact Evaluation of TSLs pilots in regions	CERTH	M10	M22
T5.3	Tools and structures assessment	FIT	M10	M22
WP6	Dissemination, Networking, Training & Exploitation	TWE	M1	M24
T6.1	Dissemination and communication	TWE	M1	M24
T6.2	Networking and Stakeholder Relationships	TWE	M1	M24
T6.3	TRANSFORMER Hub	TWE	M1	M24
T6.4	Training and capacity-building	RC	M1	M24
T6.5	Dissemination of Exploitable Results	TWE	M18	M24

Legend:
- DX.X Deliverable
- Milestones
- EC Report

Chapter 4: Deliverables & Milestones

Deliverables

Table 3: Schedule and description of Deliverables in project TRANSFORMER

Work Package No.	Deliverable No.	Work Package name	Lead Beneficiary	Start Month	End Month
WP 1	D1.1, D1.2, D1.3, D1.4	Project Coordination & Management	RUB	1	24
WP 2	D2.1, D2.2, D2.3, D2.4	Mapping, defining, and categorising of Transition Super-Labs	RUB	1	24
WP 3	D3.1, D3.2, D3.3, D3.4	Super-Lab development and pilots	BMR	1	24
WP 4	D4.1, D4.3, D4.4, D4.2	Development of Transition Super-Lab, Roadmap, Toolkits & Knowledge Hub	RC	1	24
WP 5	D5.1, D5.3, D5.4, D5.2	Evaluation & Impact Assessment	CERTH	1	24
WP 6	D6.1, D6.2, D6.3, D6.4, D6.5	Dissemination, Networking, Training & Exploitation	TWE	1	24

Deliverable No.	Deliverable Name	WP No.	Lead Beneficiary	Type	Dissemination Level	Due Date	Delivery Date
D1.1	Data Management Plan	WP1	RC	R	PU	2	4
D1.2	Project Management Plan - Version 1	WP1	RC	R	PU	2	4
D1.3	Project Management Plan – Version 2	WP1	RC	R	PU	11	
D1.4	Project Management Plan – Version 3	WP1	RC	R	PU	23	
D2.1	Summary of data collection on TSL predecessors	WP2	RUB	R	PU	2	4
D2.2	Quantitative Mapping Research Report	WP2	RUB	R	PU	6	11
D2.3	Regional SWOT analyses as feasibility studies to be	WP2	RUB	R	PU	12	

Deliverable No.	Deliverable Name	WP No.	Lead Beneficiary	Type	Dissemination Level	Due Date	Delivery Date
	used as evidence-based in decision-making for roadmap construction						
D2.4	Academic working paper(s) for conceptual framing of Transition Super-Labs	WP2	RUB	R	PU	24	
D3.1	Recommendations for Transition Super-Lab coalitions building, empowering of vulnerable and marginalised groups, and vision process (BMR)	WP3	ENoLL	R	PU	8	9
D3.2	Definition of Transition Super-Lab use cases	WP3	BMR	R	PU	9	9
D3.3	Transition Super-Lab Action Plan	WP3	BMR	R	PU	20	
D3.4	Transition Super-Labs' Lessons Learned	WP3	CERTH	R	PU	24	
D4.1	Super-Lab Roadmap - Version 1	WP4	RC	R	PU	12	
D4.2	Super-Lab Roadmap – Version 2	WP4	RC	R	PU	24	
D4.3	Toolkits (incl. matchmaking system) for Transition Super-Lab Roadmap Implementation	WP4	FIT	R	PU	12	
D4.4	Knowledge Hub	WP4	CERTH	R	PU	14	
D5.1	Framework for Super-Labs Assessment - version 1	WP5	CERTH	R	PU	9	10
D5.2	Framework for Super-Labs Assessment – version 2	WP5	CERTH	R	PU	22	
D5.3	Best practices and recommendations for Super-Labs operation towards the region transition	WP5	CERTH	R	PU	22	
D5.4	Guidelines for Super-Labs tools utilisation	WP5	FIT	R	PU	22	

Deliverable No.	Deliverable Name	WP No.	Lead Beneficiary	Type	Dissemination Level	Due Date	Delivery Date
D6.1	Communication and Dissemination Strategy and Plan - version 1	WP6	TWE	R	PU	1	2
D6.2	Communication and Dissemination Strategy and Plan - version 2	WP6	TWE	R	PU	3	4
D6.3	TRANSFORMER Hub	WP6	TWE	R	PU	6	6
D6.4	TRANSFORMER capacity building activity report	WP6	ENoLL	R	PU	24	
D6.5	TRANSFORMER Exploitation Plan	WP6	TWE	R	PU	24	

Milestones

Milestone number	Milestone name	WP number	Lead beneficiary	Due date (DoA)	Achieved date
1	Kick-off meeting	WP 1	RUB	1	1
2	Consortium meetings	WP 1	RUB	8 15 22	10
3	Analysis of TSL predecessors	WP 2	RUB	2	4
4	Quantitative mapping of EU regions with potential to become TSLs	WP 2	RUB	6	11
5	Empirically grounded conceptual framing of TSL	WP 2	RUB	24	
6	TSL coalitions established & vision agreed	WP 3	BMR	6	9
7	Super-Lab use cases/ pilots confirmed	WP 3	BMR	8	9
8	Action Plan agreed and confirmed	WP 3	BMR	12 18	
9	Lessons Learned process finalised	WP 3	BMR	22	
10	Roadmap structure delivered and accepted	WP 4	RC	6	7
11	Mid-term & final reviews of Roadmap	WP 4	RC	12 24	
12	Toolkit mockup	WP 4	RC	4	10
13	Knowledge Hub prototype ready	WP 4	RC	12	
14	Knowledge Hub's usability and sustainability confirmed	WP 4	RC	24	
15	Framework for TSL assessment agreed	WP 5	CERTH	22	

Milestone number	Milestone name	WP number	Lead beneficiary	Due date (DoA)	Achieved date
16	Impact assessment criteria (KPIs) for involved TSLs agreed	WP 5	CERTH	22	
17	Guidelines for TSL tools utilisation available	WP 5	CERTH	22	
18	Assessment of training needs conducted	WP 6	TWE	3	6
19	TRANSFORMER capacity building plan and User Forum established	WP 6	TWE	12	
20	TRANSFORMER HUB online	WP 6	TWE	6	6

Chapter 5: Internal Coordination Procedures

Monthly meetings among the consortium partners will guarantee the synchronization of all the tasks, define control procedures to follow the evolution of work, solve potential conflicts between partners, define dissemination policies for results and plan the presentation of common communications. Apart from meetings, there will be other means of communication: email, video conferences and an online repository for document exchange (SharePoint, OneNote).

The project management team, consisting of RUB and RC, will meet biweekly to discuss coordination and project management topics.

Meetings

Representation in Meetings

Any Member of the GA should be present or represented at any meeting and shall participate cooperatively in a meeting. They may likely appoint a substitute or a proxy to attend and vote at any meeting.

Convening meetings

The chairperson shall convene ordinary meetings of the General Assembly at least once every six months and shall also convene extraordinary meetings at any time upon written request of any Member.

Notice of a meeting

The chairperson shall give written notice of a meeting to each Member as soon as possible and no later than 14 calendar days preceding an ordinary meeting and 7 calendar days preceding an extraordinary meeting.

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Sending the agenda

The chairperson shall prepare and send each Member an agenda no later than 14 calendar days preceding the meeting, or 7 calendar days before an extraordinary meeting.

Adding agenda items

Any agenda item requiring a decision by the Members must be identified as such on the agenda. Any Member may add an item to the original agenda by written notice to all of the other Members no later than 7 calendar days preceding the meeting and 2 days preceding an extraordinary meeting.

During a meeting of the General Assembly, the Members present or represented can unanimously agree to add a new item to the original agenda. Meetings of the General Assembly may also be held by videoconference or other telecommunication means. Decisions will only be binding once the relevant part of the minutes has been accepted according to Section 6.3.6.2. of the Consortium Agreement.

Decisions without a meeting

Any decision may also be taken without a meeting if:
- The Project Coordinator circulates to all Members of the General Assembly a suggested decision with a deadline for responses of at least 10 calendar days after receipt by a Party and
- The decision is agreed upon by 51 % of all Parties.

The PC shall inform all the Members of the outcome of the vote. A veto may be submitted up to 15 calendar days after receipt of this information. The decision will be binding after the Project Coordinator sends a notification to all Members. The Project Coordinator will keep records of the votes and make them available to the Parties on request.

Minutes of meetings

The chairperson shall produce minutes of each meeting which shall be the formal record of all decisions taken. The draft minutes should be sent by email to all Members within 10 calendar days of the meeting. The minutes shall be considered as accepted if, within 15 calendar days from receipt, no Party has sent an objection to the chairperson with respect to the accuracy of the draft minutes by written notice. The chairperson shall send the accepted minutes to all the Members, including the Project Coordinator, who shall retain copies of them.

The decision-making process and conflict resolution

The consortium members will try to solve amicably any problem that might emerge during the TRANSFORMER project execution. The decision-making process will be done according to the procedures established in the Consortium Agreement and summarized as follows:

Voting rules and quorum

The General Assembly shall not deliberate and decide validly in meetings unless two-thirds (2/3) of its Members are present or represented (quorum). If the quorum is not reached, the chairperson of the General Assembly shall convene another ordinary meeting within 15 calendar days. If in this meeting the quorum is not reached once more, the chairperson shall convene an extraordinary meeting which shall be entitled to decide even if less than the quorum of Members is present or represented. Each Member present or represented in the meeting shall have one vote. A Party that the General Assembly has declared according to the Breach clause to be a Defaulting Party may not vote. Decisions shall be taken by a majority of two-thirds (2/3) of the votes cast.

Veto rights

A Party which can show that its own work, time for performance, costs, liabilities, intellectual property rights or other legitimate interests would be severely affected by a decision of the General Assembly may exercise a veto with respect to the corresponding decision or relevant part of the decision. When the decision is foreseen on the original agenda, a Party may only veto such a decision during the meeting. When a decision has been taken on a new item added to the agenda before or during the meeting, a Party may veto such decision during the meeting or within 15 calendar days after receipt of the draft minutes of the meeting. When a decision has been taken without a meeting a Party may veto such decision within 15 calendar days after receipt of the written notice by the chairperson of the outcome of the vote. In case of exercise of veto, the Parties shall make every effort to resolve the matter which occasioned the veto to the general satisfaction of all Parties. A Party may neither veto decisions relating to its identification to be in breach of its obligations nor to its identification as a Defaulting Party. The Defaulting Party may not veto decisions relating to its participation and termination in the consortium or the consequences them. A Party requesting to leave the consortium may not veto decisions relating thereto.

Chapter 6: Quality and risk management

Quality check of deliverables

The Project Coordinator will have the overall responsibility for the quality control process, with the support of the Project Manager, including the coordination and support for the preparation of project deliverables and key public documents. An internal quality control system will be implemented with a deliverables monitoring table and using the project's Asana space, where the internal project timeline, responsible (co-) authors, and the exact time of review will be established. A Two-Stage peer process for deliverables will be set up.

- The author or WP leader uploads the final draft deliverable at the latest 15 calendar days before the end of the due month mentioned in the DoA on SharePoint and then informs RUB, RC, CERTH and Dumni z Lubina where on SharePoint the final draft deliverable can be found.
- The peer reviewers have five business days to perform the peer review.
- The peer reviewer's comments are inserted directly into the document on SharePoint via comments and track changes functions.
- The author has five days for revising the document. After the revision, the author informs RUB and the peer reviewers about the status of the revision.
- RUB, RC, CERTH and Dumni z Lubina check the updated version of the deliverable in joint discussion with the author before submission to CINEA by the Project Coordinator.
- Certain important deliverables reaching a wider public might require a special language check and may also be forwarded to selected internal or external experts for an additional review.
- As Project Coordinator, RUB will provide the final approval of the deliverables before submitting them on the portal.

Changes have been made in the quality check of the deliverables, which can be summarised as follows:

- Dumni z Lubina is no longer required to contribute to the reviewing process. This decision was taken to reduce the complexity of having multiple reviewers and reduce the processing time for the review for both reviewers and deliverable authors.
- Additional partners may be foreseen as reviewers for specific deliverables or sections of deliverables if a significant link between the deliverable and their work package/task is seen.
- An internal checklist (Fig 5.) was created by the Project Coordinator for the deliverable authors to complete to streamline and improve the deliverable submission process.

Checklist

Save a copy of your Deliverable as a backup	
Spelling & grammar proofing conducted	
No comments or corrections/changes left in the document	
Title page complete	
Document history complete and in chronological order	
All figures inserted (in high quality/a sufficient resolution) in the document	
All figure captions included and correct	
All tables inserted in the document	
All table captions included and correct	
All references included in the reference list	
Reference list complete and in alphabetical order (last name of author first)[1]	
Page breaks (title, subtitle, section/paragraph, bullet points) included according to your preferences	
All headers are included, on the right level and (if applicable) correctly numbered	
Update all automatically generated fields (e.g., cross-references)[2]	
"Table of Content" complete and correct (all headers are included and on the right level)	
"Table of Figures" complete and correct	
"Table of Tables" complete and correct	
Checklist complete	
Name:	**Date:**

Figure 5: Deliverable internal checklist

Quality of the project

A combination of qualitative and quantitative tools will be used to measure the impact and effectiveness of the communication and dissemination activities and stakeholder participation (online statistical and anecdotal feedback, compiled with digital metric tools necessary for reporting). Data will be compiled and evaluated regularly, on a monthly basis and utilised to build indicators, which will be continuously followed. The monthly results will be constantly benchmarked against set goals and indicators, and we will be able to determine throughout the lifetime of the strategy the possible shortcomings and adjust accordingly. Monitoring & evaluation tools include among others online and offline Key Performance Indicators (KPIs), analysis of web traffic and social media performance, online/offline event and workshop attendance tracking, publications-related statistics and qualitative feedback through questionnaires.

Risk Management

In the DoA of the Grant Agreement the potential risks and corresponding mitigation measures, which have been identified during the project development phase, have been listed. A framework for the identification, monitoring and prevention of project risks has been set up which will take care of the following tasks:

- Coordinate and identify risks at the project level
- Monitor to prevent risks from developing into implementation barriers
- Address and solve risks
- Update risk registry and risk mitigation measures, also in progress reports

A list of critical risks and risk management strategies has been listed in Table 4.

Table 4: List of risks and their mitigation procedures.

Risk No.	Description	Work Package No(s)	Proposed Mitigation Measures
1	Managerial changes within the project such as change of administration/ leadership (i) L: medium; ii) S: low)	WP1	Close communication between team members throughout the project about all management decisions. A project-internal virtual cooperation space is maintained by the Project Manager.
2	Insufficient communication of progress and results by partners (i) L: low; ii) S: medium)	WP1	Clear organisational structures, roles, and responsibilities. WP leaders report regularly on progress, findings & resource use, and regular communication with partners.
3	Lack or difficult communication among partners (i) low; ii) S: high)	WP1	Regular communication and exchange via (online) meetings and the project SharePoint will enable close work relationships, enabling the identification of communication issues at an early stage. All partners involved in the project are fluent in English.
4	Risks related to delays, poor execution, contract breach or conflict of interests including third parties (i) low; ii) S: high)	WP1	Proper procurement procedures and selection criteria; clearly defined decision-making mechanisms, agreements, and conditions
5	Unexpected changes in resource allocation (i) low; ii) S: low)	WP1	A detailed plan with clearly defined responsibilities allocated to all participants will be agreed upon at the start of the project.
6	Withdrawal or temporary unavailability of a partner (i) L: medium ii) S: low)	WP1	Particularly relevant for regional partners & considering the COVID-19 pandemic. To mitigate this, we ensure that tasks are covered by more than one partner.

7	Impact of the COVID-19 pandemic on meetings and events (i) L: medium ii) S: low)	WP4; WP6	It might be that in-person meetings (consortium, stakeholders) won't be safely possible until well into the project duration. To mitigate this risk, partners have backup plans for online-only communication channels and videoconferences
8	Insufficient mobilisation of quadruple helix stakeholders, unequal representation (i) L: low; ii) S: medium)	WP5; WP3	Mobilisation: Pro-active acquisition through regional project partners and information and mobilisation already from the proposal phase Representation: Monitoring and pro-active acquisition of all quadruple helix stakeholders, including gender balance and underrepresented societal groups.
9	Insufficient and heterogeneous participation when developing the Super-Lab Toolkit (i) L: low; ii) S: high)	WP4	Mobilisation: proactive acquisition through regional project partners and information. Participation: pro-active & interactive workshops targeted to the nature of stakeholders involved
10	Difficulty accessing necessary data (i) L: low (ii) S: medium)	WP4, WP5, WP3	The experience and diversity of the partners mitigate this risk, but should a situation arise where critical data cannot be obtained, publicly available data will be used for the study.
11	Insufficient and heterogeneous supply of data for comparative case study mapping (i) L: medium; ii) S: medium)	WP2	Not fully avoidable but will be reduced through unified templates from WP leaders and bottom-up data supply from regional partners.
12	Disputes over ownership of IPR or breach of IPR conditions amongst consortium partners (i) L: low (ii) S: low)	WP4, WP3	IPR and access rights clauses will be included in the CA (to be signed before the project starts) and any clauses that may present difficulties will be negotiated beforehand, to avoid future disputes.
13	Weakness of the regions to follow the TLSs' approach (i) L: low (ii) S: high)	WP4, WP3	TRANSFORMER will provide a sound SWOT analysis (D2.3) per region to align needed capacity building in terms of co-creation and enabling coalitions (D3.1) and providing targeted capacity building measures like the toolkits (D4.2), knowledge hub (D4.3) and the exchange with regions from the User Forum (M19) to develop a weakness- and threads-oriented capacity building programme per region (D6.3/ M19) to enable regions to follow the TLSs' approach and to develop a customised to their own needs and priorities roadmap.

Chapter 7: Communication, Dissemination and Exploitation

Unless otherwise agreed with the granting authority, the beneficiaries must promote the action and its results by providing targeted information to multiple audiences (including the media and the public), in accordance with Annex 1 of the Grant Agreement and in a strategic, coherent, and effective manner. Before engaging in a communication or dissemination activity expected to have a major media impact, the beneficiaries must inform the granting authority.

Unless otherwise agreed with the granting authority, communication activities of the beneficiaries related to the action (including media relations, conferences, seminars, and information material, such as brochures, leaflets, posters, banners, presentations, etc., in electronic form, via traditional or social media, etc.), dissemination activities and any infrastructure, equipment, vehicles, supplies or major result funded by the grant must acknowledge EU support and display the European flag (emblem) and funding statement (translated into local languages, where appropriate).

Communication tools

All communication activities are supporting and deeply intertwined with all other engagement, dissemination, replication, and exploitation activities, they aim to raise awareness of TRANSFORMER TSLs and ensure effective, regular communication, dissemination and outreach channels throughout. They will be implemented and managed as set out in D6.1&2 and running through the communication channels: integrating the TSL Knowledge Hub (D4.4) into the online TRANSFORMER Hub (T6.3) that will be the main access point to Super-Labs community combining all dissemination, communication, and engagement activities in one integrated online space. All news, events, webinar/workshop recordings etc. will be published here providing a full overview of the project activities.

The communication tools are described in detail below:
- Animated social media video stories to explain the concept innovatively and engagingly that help overcome language barriers online or at events (subtitled into all 4 languages).
- Production of general media content, regular social media text and visual content to help engage TG A and reach TG B, and C and engage with them in their "own" environment.
- Communication materials showcasing key progress and outcomes of the project aimed at the needs or habits of the specific local target audience (e.g., leaflet or flyer), and online visual content (Infographics) to illustrate the Super-Lab solutions and help to understand during presentations.
- Media: TRANSFORMER will seek impact in media, providing articles, press releases and coverage on the project (EU. Research, industry magazines), and online news feeds (e.g., CORDIS wire).
- Social media: own (EU level) and partner channels (regional level), focusing mainly on the ones, where their target audiences are present (LinkedIn, YouTube, others to be explored in the needs D6.1&2), making full use of the multiplication effect of the partners and their organisation accounts as well as of the stakeholder reach.

- TRANSFORMER Hub: central communication channel for the project, designed in a model developed to be accessible and approachable for all target groups and stakeholders, easily searchable, with an automated translation, a combination of private and public features, e.g.
  - "About" (presentation of the project, partner regions and the goals of the Super-Lab concepts)
  - News and events space (latest news, which will be working as a blog, promoting interesting stories and news; also on training, webinars and workshops (T6.2 and T6.4)),
  - Publication space (electronic versions of project's publications, deliverables etc.),
  - (Semi-Private) Training space (combining webinar, workshop recordings, training, explainer videos, podcasts, + syllabus and materials for training with existing training platforms (Virtual Learning Lab (ENoLL) & Mobility Academy (RC) and local/regional training centres (see EoIs),
  - Stakeholder space (stakeholder-provided resources, connected websites and input surveys and forms) and
  - (Semi-private) Connected repository (for TSLs to present solutions, outcomes, exploitable results and deliverables; space displaying all other stakeholder resources relevant to the TRANSFORMER Knowledge Hub and toolkit (WP4).

Dissemination

The core objective of dissemination is to share partial and final TRANSFORMER results and knowledge with the aim of replication. We planned the dissemination of project results to target groups on all three levels (TSL, Regional, EU) and it will be done via "standard" dissemination actions (hybrid events, workshops, publications, social media posts, etc.) and "innovative" actions (exchange podcasts; visual stories; animated videos; progress visualisation; that i) transform the project progress and solutions into interesting content relevant for a wider audience and ii) help illustrate complex topics to technical experts and enhance the value of TRANSFORMER for stakeholder engagement, replication and uptake of solutions, and contribute to open science. Dissemination channels include:

- TRANSFORMER own channels (website, Hub, Twitter, LinkedIn, YouTube); partner channels (regional, EU)
- Network channels (researcher, policy, industry, start-up hubs/matchmaking platforms).

Further dissemination tools are promotional campaigns to promote key results to a wider audience on the EU level (TG3) and feed also into the exploitation of results, promotional products for online/offline workshops/webinars: templates, interactive infographics, TRANSFORMER Hub (linked to knowledge hub (D4.4) focused on dissemination and sharing (see also below) and publications and white papers, as based on the outcomes of WP2.

Exploitation

TRANSFORMER will extract real-world outcomes from the TSL implementation with an emphasis on the production of scalable results, enriched through the capacity-building process (T6.4) and can be built into innovation blueprints (D4.1&2), which may be perpetuated as an integrated package or standalone measures (D3.3) after the end of the project to ensure the relevance, uptake, impact, and sustainability of the project results beyond the funding period. We build the exploitation on three pillars namely Exploitable Results, Enriched co-created solutions and Capacity Building programmes.

Chapter 8: Project Reporting

The project beneficiaries must continuously report on the progress of the action (e.g., deliverables, milestones, outputs/outcomes, critical risks, indicators, etc; if any), in the Portal Continuous Reporting tool and following the timing and conditions it sets out (as agreed with the granting authority).

Periodic reporting

In addition, the beneficiaries must provide reports to request payments, following the schedule and modalities set out in the Data Sheet. The prefinancing and periodic reports include technical and financial parts. The technical part includes an overview of the action implementation. It must be prepared using the template available in the Portal Periodic Reporting tool. The financial part of the additional prefinancing report includes a statement on the use of the previous prefinancing payment. An additional prefinancing report and a periodic report are required for additional prefinancing and interim payments.

The first technical report for months 1-12 is slated to be submitted at the end of Month 14. The second technical report for months 13-24 is to be submitted at the end of month 26. Interim reports for internal use only will be developed in Month 6 and in Month 18 to facilitate the elaboration of the technical reports.

Technical reports consist of two parts:

- Part A: contains the structured tables with project information (retrieved from the Grant Management System).

- Part B (the narrative part): mirrors the application form and requires the participants to report on differences (delays, work not implemented, new subcontracts, budget overruns etc.) It must be uploaded as a PDF document.

The financial statements must detail the eligible costs and contributions for each budget category and, for the final payment, also the revenues for the action. All eligible costs and contributions incurred should be declared, even if they exceed the amounts indicated in the estimated budget. Amounts that are not declared in the individual financial statements will not be considered by the granting authority.

Chapter 9: Budget

Estimated Budget

All consortium partners are fully committed to mobilizing the resources crucial to performing the tasks in the proposal, and to engaging in dissemination and outreach activities targeting respective stakeholders and policymakers in the cities and regions addressed. All consortium partners involved have access to the necessary facilities to perform this project in all partner regions and the EU. A Party shall be funded only for its tasks carried out in accordance with the Consortium Plan.

The financial contribution of the Granting Authority to the Project shall be distributed by the Project Coordinator according to the:

- The Consortium Plan
- The approval of reports by the Granting Authority, and
- The provisions of payment described in Section 7.2 of the Consortium Agreement

The grant is an action grant which takes the form of a budget-based mixed actual cost grant (i.e., a grant based on actual costs incurred, but which may also include other forms of funding, such as unit costs or contributions, flat-rate costs or contributions, lump sum costs or contributions or financing not linked to costs). The maximum grant amount is EUR 2,299,937.50 (Two million two hundred and ninety-nine thousand nine hundred thirty-seven euros and fifty cents). The estimated eligible costs are the same as the grant amount with a 100% funding rate. The budget breakdown may be adjusted without an amendment as decided by transfers (between participants and budget categories), as long as this does not imply any substantive or important change to the description of the action (DoA).

Payment Procedures

There are three types of payments in the TRANSFORMER project according to the Grant Agreement and Consortium Agreement:

- **Pre-financing payment**: The EC will make the pre-financing payment to the coordinator within 30 days either from the entry into force of the Agreement or from 10 days before the starting date of the action, whichever is the latest. The pre-financing will be released in two instalments among partners, the first one will be 80 % of the grant amount and it will be transferred without undue delay.

- **Interim payments**: After the approval of the periodic reports (including the cost claim and EC grant request) by the EC within 90 days of receiving the reports (after months M12).

- **Payment of the balance**: Upon submission of the official cost claiming to the EC and approval of the reports by the EC within the next 90 days of receiving the reports. It will be based on the amounts of costs approved by the EC (after month M24).

Payments to Parties are the exclusive task of the Project Coordinator. In particular, the PC shall:

- Notify the Party concerned promptly of the date and composition of the amount transferred to its bank account, giving the relevant references.
- Perform diligent tasks in the proper administration of any funds and in maintaining financial accounts.
- Undertake to keep the Granting Authority's financial contribution to the Project separated from its normal business accounts, its own assets and property, except if the PC is a Public Body or is not entitled to do so due to statutory legislation.
- With reference to the Grant Agreement, no Party shall before the end of the Project receive more than its allocated share of the maximum grant amount less the amounts retained by the Granting Authority for the Mutual Insurance Mechanism and for the final payment.

The transfer of the initial pre-financing, the additional pre-financings (if any) and interim payments to Parties will be handled in accordance with Article 22.1. and Article 7 of the Grant Agreement following this payment schedule:

- Funding of costs included in the Consortium Plan will be paid by the Coordinator to the Parties after receipt of payments from the Granting Authority without undue delay, not later than thirty (30) days from the receipt thereof from the Granting Authority, and in conformity with the provisions of the Grant Agreement. Costs accepted by the Granting Authority will be paid to the Party concerned.
- The PC is entitled to withhold any payments due to a Party identified by the General Assembly to be in breach of its obligations under this Consortium Agreement or the Grant Agreement or to a Beneficiary which has not yet signed this Consortium Agreement.
- The PC is entitled to recover any payments already paid to a Defaulting Party except the costs already claimed by the Defaulting Party and accepted by the Granting Authority. The PC is equally entitled to withhold payments to a Party when this is suggested by or agreed with the Granting Authority.

Chapter 10: Review of Project Management Plan

The PMP has been distributed among all the consortium partners and all of them are aware of the information contained. The PMP will be a "live" document, it will be updated every time a management procedure is modified according to the project's needs. Older versions of the PMP will be kept on SharePoint before each update. One more updated version of this document will be submitted as deliverables to the EC:

- "D1.4 Project management handbook. Third release" is due in month 23

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Chapter 11: Conclusion

This deliverable contains the necessary guidelines for project management and quality assurance. It contains presentation standards for internal documents and for deliverables and reports to the EC, measures to ensure timely reporting, payment procedures plan and calendar, conflict prevention and resolution and internal communication procedures aiming at achieving the best results on TRANSFORMER's project execution.

Chapter 12: References

EC. Project reporting templates for H2020 projects, specifically "Research and Innovation actions".