



bEhaVioral Insights anD Effective eNergy policy acTions

Project No. 957117

Project acronym: EVIDENT

Project title:

bEhaVioral Insgihts anD Effective eNergy policy acTions

Deliverable 8.1

Project Management Handbook

Programme: H2020-LC-SC3-EE-2020-1

Start date of project: December 01, 2020

Duration: 36 months

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 957117



Document Control Page

Deliverable Name	Project Management Handbook
Deliverable Number	D8.1
Work Package	WP8
Associated Task	T8.1
Covered Period	M01
Due Date	M01 – December 31, 2020
Completion Date	M01 – December 31, 2020
Submission Date	M01 – December 31, 2020
Deliverable Leader	University of Western Macedonia (UOWM)
Deliverable Author(s)	Panagiotis Radoglou-Grammatikis (UOWM), Anna Triantafyllou (UOWM), Stamatia Bibi (UOWM), Christina Petaloti (UOWM), Panagiotis Sarigiannidis (UOWM)
Version	v1.0

Dissemination Level		
PU	Public	X
CO	Confidential to a group specified by the consortium (including the Commission Services)	

Document History

Version	Date	Change History	Author(s)	Organisation
0.1	December 20, 2020	Table of contents, Initial version	Panagiotis Radoglou-Grammatikis (UOWM), Anna Triantafyllou (UOWM), Stamatia Bibi (UOWM), Christina Petaloti (UOWM), Panagiotis Sarigiannidis (UOWM)	UOWM
0.2	December 23, 2020	Feedback from the partners regarding the internal review procedure	-	DUTH, SID, PPC, TCD, Bi2S, JRC, CERTH, CW
0.3	December 28, 2020	Internal review	Dimosthenis Ioannidis (CERTH),	CERTH, DUTH

			Paris Karypidis (DUTH)	
0.4	December 29, 2020	Quality review	Dimosthenis Ioannidis (CERTH)	CERTH
1.0	December 31, 2020	Final version submitted to the European Commission	Panagiotis Radoglou-Grammatikis (UOWM), Anna Triantafyllou (UOWM), Stamatia Bibi (UOWM), Christina Petaloti (UOWM), Panagiotis Sarigiannidis (UOWM)	UOWM

Internal Review History

Name	Institution	Date
Michail Angelopoulos	PPC	December 28, 2020
Paris Karypidis	DUTH	December 28, 2020

Quality Manager Revision

Name	Institution	Date
Dimosthenis Ioannidis	CERTH	December 28, 2020

Legal Notice

The information in this document is subject to change without notice.

The Members of the EVIDENT Consortium make no warranty of any kind about this document, including, but not limited to, the implied warranties of merchantability and fitness for a particular purpose.

The Members of the EVIDENT Consortium shall not be held liable for errors contained herein or direct, indirect, special, incidental, or consequential damages in connection with the furnishing, performance, or use of this material.

The European Commission is not responsible for any use that may be made of the information it contains.

Table of Contents

Table of Contents.....	5
List of Figures	7
List of Tables	8
Acronyms	9
1. Introduction	11
1.1. Purpose of the Deliverable	11
1.2. Relations with Other Deliverables	11
1.3. Structure of the Deliverable.....	11
2. Project Management Structure	13
2.1. EVIDENT Committees.....	13
2.1.1. General Assembly	13
2.1.2. Technical Management Committee.....	14
2.1.3. Impact Creation Board	15
2.1.4. Ethics and Privacy Committee	16
2.1.5. External Advisory Board.....	16
2.2. EVIDENT Management Roles	16
2.2.1. Project Coordinator.....	16
2.2.2. Technical Manager	17
2.2.3. Quality Manager	17
2.2.4. Business Development Manager	17
2.2.5. Evaluation Procedures Manager	18
2.2.6. Ethics Manager.....	18
2.2.7. Work Package Leaders	18
2.2.8. Data Protection Officers.....	18
3. Documents of Reference	18
3.1. Grant Agreement	19
3.2. Consortium Agreement.....	19
3.3. D8.1 – Project Management Handbook	20
4. Project Management Tools and Procedures.....	21
4.1. Reporting Periods and Periodic Reports	21
4.2. Meetings	21

4.2.1.	General Assembly Meetings	21
4.2.2.	Hosting Physical Meetings	21
4.2.3.	Meeting Minutes.....	22
4.3.	Deliverables Review and Submission Procedure	22
4.3.1.	Deliverable Peer Review Procedure.....	22
4.3.2.	Deliverable Editing and Review Assignments	23
4.4.	Events That Must Be Immediately Reported	25
4.5.	Project Management and Communication Tools	26
4.5.1.	Mailing Lists.....	26
4.5.2.	Collaboration Management Platform	26
4.5.3.	Teleconference Platform	28
4.5.4.	Version Control Repository.....	28
5.	Documentation and Dissemination	29
5.1.	Documentation Templates	29
5.2.	File Naming Conventions and Versioning	29
5.3.	Dissemination Policy (Article 38 of GA)	30
5.4.	Consortium Logo	31
6.	Conclusions	32

List of Figures

Figure 1: The Project Management Structure	13
Figure 2: The EVIDENT page on Confluence	27
Figure 3: Usage of the Zoom software.....	28
Figure 4: The landing page of Bitbucket	29
Figure 5: The EVIDENT logo.....	31

List of Tables

Table 1: The members of the General Assembly	14
Table 2: The composition of the TMC.....	15
Table 3: The members of the Impact Creation Board	15
Table 4: The members of the Ethics and Privacy Committee	16
Table 5: Deliverable editing and review assignment	23

Acronyms

Acronym	Explanation
BDM	Business Development Manager
CA	Consortium Agreement
DL	Deliverable Leader
DPO	Data Protection Officer
EAB	External Advisory Board
EC	European Commission
EM	Ethics Manager
EPC	Ethics and Privacy Committee
EPM	Evaluation Procedures Manager
EU	European Union
GA	Grant Agreement
ICB	Impact Creation Board
LEAR	Legal Entity Appointed Representative
PC	Project Coordinator
PM	Person Month
PO	Project Officer
QM	Quality Manager
RP	Reporting Period
TL	Task Leader
TM	Technical Manager
TMC	Technical Management Committee
URL	Uniform Resource Locator
WP	Work Package
WPL	Work Package Leader

Executive Summary

This document introduces the necessary structures, procedures, and tools to manage and implement the EVIDENT project. Its purpose is to offer a brief yet thorough overview of the management and collaboration guidelines of the project towards its successful execution. It aims at complementing the Grant Agreement (GA) and the Consortium Agreement (CA) provisions.

Several management roles of the project management structure are identified, namely the Project Coordinator (PC), the Technical Manager (TM), the Quality Manager (QM), the Business Development Manager (BDM), the Evaluation Procedures Manager (EPM), the Ethics Manager (EM). Moreover, several governing bodies are also defined, namely the General Assembly, the Technical Management Committee (TMC), the Impact Creation Board (ICB), the Ethics and Privacy Committee (EPC) and the External Advisory Board (EAB).

Moreover, this document highlights the documents that should be considered during the project's lifecycle, namely (a) GA, (b) CA and (c) this deliverable (i.e., Deliverable 8.1 (D8.1) – Project Management Handbook). Next, it introduces the project collaboration procedures and tools, such as (a) meetings, (b) internal review procedure, (c) templates, (d) collaboration management platform, (e) teleconference tool and (f) version control repository.

The EVIDENT consortium will utilise this document to maintain a common understanding of the procedures and rules to be followed for the day-to-day project management and execution.

1. Introduction

1.1. Purpose of the Deliverable

This deliverable aims to present the basic guidelines regarding the management and coordination of the EVIDENT project. All the following procedures and tools are defined for efficiently and transparently monitoring and controlling the progress in this project. UOWM as the project coordinator will be responsible for the project management as defined in Work Package 8 (WP8) of the Grant Agreement (GA).

The project management includes the design and the implementation of a detailed monitoring plan regarding the execution of the various phases during the entire project's lifecycle. This monitoring plan includes processes of tracking, reviewing and orchestrating the progress and performance of the EVIDENT project.

In particular, the following activities are defined:

- **Partner engagement and communication:** Managing the inter-partner cooperation, attend to conflict resolution and ensuring that the communication required between partners is met throughout the project.
- **Financial management and reporting:** Involving the interfacing with the funding authorities, liaison with all partners, subcontractors, and third parties, establishing and maintaining financial records, following up the European Commission (EC) payments and distributing partner shares according to the Consortium Agreement (CA).
- **Technical and scientific progress monitoring:** Involving tracking, reviewing, and reporting the progress of all technical WPs. According to the findings, amendment requests may arise.
- **Innovation and quality progress monitoring:** Ensuring the high-level quality standards of the deliverables defined in the proposal.
- **Risk assessment and control:** Involving the identification of new risks and the documentation of current ones in the risk register. According to the findings, amendment requests may arise.

1.2. Relations with Other Deliverables

This deliverable is related to all following deliverables, especially those of WP8. It defines the management structures that need to be considered for the preparation and the quality assessment of each EVIDENT deliverable. Moreover, it specifies the internal reviewers for each deliverable as well as the necessary templates that will be used during the project. Furthermore, it includes the project management and collaboration tools that are available for the partners during the EVIDENT lifecycle.

1.3. Structure of the Deliverable

The deliverable is organized as follows:

- **Section 2 – Project Management Structure:** It specifies the project management structure based on the GA and the CA.
- **Section 3 – Documents of Reference:** This section enumerates the documents that should be considered by the EVIDENT partners during the project’s lifecycle.
- **Section 4 – Project Management Tools and Procedures:** This section describes the management and collaboration tools that will be available during the project for its proper management and the efficient cooperation among the various partners.
- **Section 5 – Documentation and Dissemination:** This section introduces the EVIDENT templates that will be utilised during the project.
- **Section 6 – Conclusions:** This section concludes this report.

2. Project Management Structure

This section provides a comprehensive description of the project management structure as defined in Part B of the GA (section 3.2 Management Structures and Procedures). In particular, Figure 1 depicts the Project Management Structure of the EVIDENT project. It is composed of five committees, namely (a) General Assembly, (b) Technical Management Committee (TMC), (c) Impact Creation Board (ICB), (d) Ethics and Privacy Committee (EPC) and (e) External Advisory Board (EAB). The General Assembly is mainly organised of the Project Coordinator (PC), the Quality Manager (QM), the Evaluation Procedures Manager (EPM), the WP Leaders (WPLs) and the Data Protection Officers (DPOs) of each organisation participating in EVIDENT. Accordingly, TMC, ICB and EPC are coordinated by the Technical Manager (TM), the Business Development Manager (BDM) and the Ethics Manager (EM), respectively. The aforementioned committees and roles are analysed further in the following sections.

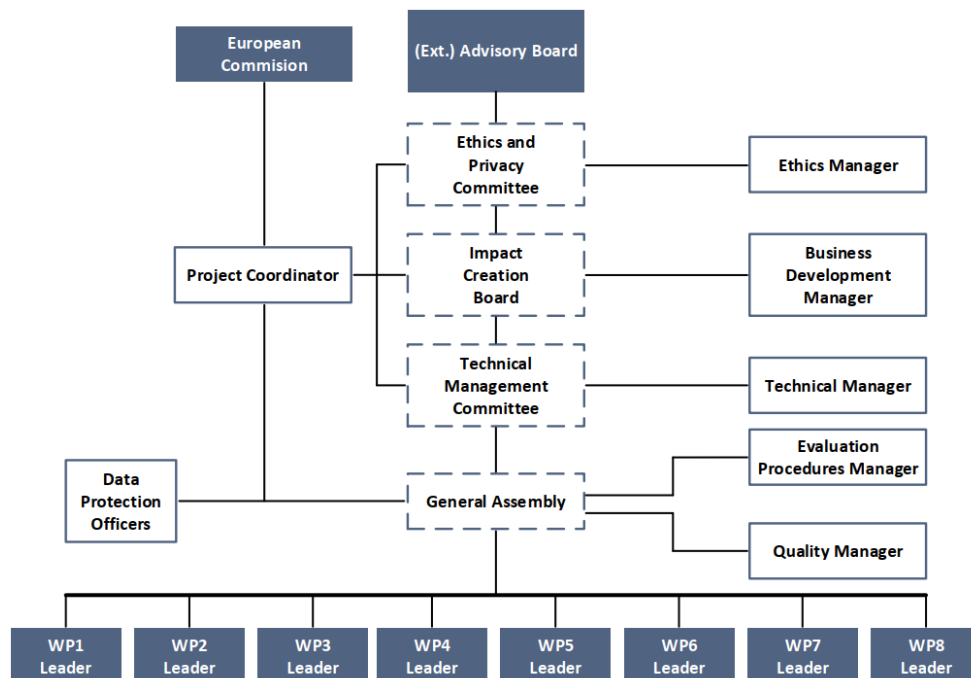


Figure 1: The Project Management Structure

2.1. EVIDENT Committees

2.1.1. General Assembly

The General Assembly is the central governing body for the EVIDENT Project. The General Assembly oversees the project's overall strategic administration and consists of one representative from each partner of the consortium. The main areas of responsibility of the General Assembly are summarised to the following points:

- Decides upon managing the project work plan and budget, the overall technical, dissemination and exploitation roadmap.
- Tackles possible defaults from partners not complying with their obligations under the EC contract.
- Monitors project progress and supervises quality control.
- Harmonises the cooperation among partners.
- Alleviates potential issues and conflicts that may arise and agrees on procedures and policies for managing the knowledge generated by the project, including its dissemination and usage, during and beyond the project lifetime.

The General Assembly is chaired by the PC.

The members of the General Assembly are provided in Table 1.

Table 1: The members of the General Assembly

General Assembly		
Mailing List: evident-general-assembly@lists.uowm.gr		
Partner	Representative	Email
UOWM	Panagiotis Sarigiannidis (Chairman and PC)	psarigiannidis@uowm.gr
DUTH	Ioannis Pragidis	gpragkid@econ.duth.gr
SID	Anastasios Lytos	alytos@sidroco.com
PPC	Michael Angelopoulos	m.angelopoulos@dei.com.gr
TCD	Paul Liston	pliston@tcd.ie
Bi2S	Ioannis Neokosmidis	i.neokosmidis@bi2s.eu
JRC	Tilemahos Efthimiadis	Tilemahos.EFTHIMIADIS@ec.europa.eu
CERTH	Dimosthenis Ioannidis	djoannid@iti.gr
CW	Peter Rosengren	peter.rosengren@checkwatt.se

2.1.2. Technical Management Committee

The TMC consists of all WPLs and the TM. The TMC will collect the accumulated experience on innovation management of research institutes, cutting-edge industries, and universities for effectively promoting the outcomes of EVIDENT exploiting at the maximum internal and external opportunities presented.

TMC is responsible for reporting the technical progress of each WP to the TM, as well as the plans and the methodologies utilised for carrying out the work in the corresponding WPs. Moreover, TMC undertakes to communicate the technical work with the Task Leaders (TLs), reviewing the corresponding deliverables and submitting them to the PC. Other duties are in the context of technical reporting in meetings, and the promotion of interdisciplinary knowledge acquisition.

In each WP, there will also be TLs with the responsibilities to allocate work to the partners in the specific task and produce deliverables based on partners' contributions and submit them to the WP leaders.

The TMC is chaired by the TM.

The members of the TMC are provided in Table 2.

Table 2: The composition of the TMC

Technical Management Committee		
Partner	Representative	Email
UOWM	Panagiotis Sarigiannidis	psarigiannidis@uowm.gr
DUTH	Ioannis Pragidis (Chairman and TM)	gpragkid@econ.duth.gr
SID	Anastasios Lytos	alytos@sidroco.com
PPC	Michael Angelopoulos	m.angelopoulos@dei.com.gr
TCD	Paul Liston	pliston@tcd.ie
Bi2S	Ioannis Neokosmidis	i.neokosmidis@bi2s.eu
JRC	Tilemahos Efthimiadis	Tilemahos.EFTHIMIADIS@ec.europa.eu
CERTH	Dimosthenis Ioannidis	djoannid@iti.gr
CW	Peter Rosengren	peter.rosengren@checkwatt.se

2.1.3. Impact Creation Board

The ICB consists of all WPLs and aims to provide strategic oversight for the project, considering the business and technical strategy. The ICB provides guidance, direction, and overall governance of the project, ensuring the delivery of the EVIDENT innovations to the market.

The ICB is chaired by the BDM.

The members of the ICB are provided in Table 3.

Table 3: The members of the Impact Creation Board

Impact Creation Board		
Partner	Representative	Email
UOWM	Panagiotis Sarigiannidis	psarigiannidis@uowm.gr
DUTH	Ioannis Pragidis	gpragkid@econ.duth.gr
SID	Anastasios Lytos	alytos@sidroco.com
PPC	Michael Angelopoulos	m.angelopoulos@dei.com.gr
TCD	Paul Liston	pliston@tcd.ie
Bi2S	Ioannis Neokosmidis (Chairman and BDM)	i.neokosmidis@bi2s.eu
JRC	Tilemahos Efthimiadis	Tilemahos.EFTHIMIADIS@ec.europa.eu
CERTH	Dimosthenis Ioannidis	djoannid@iti.gr
CW	Peter Rosengren	peter.rosengren@checkwatt.se

2.1.4. Ethics and Privacy Committee

The EPC consists of representatives from all partners. The purpose of the EPC is to establish a project policy taking into account the ethical and privacy rules and regulations. All ethical and privacy considerations are documented in a manual, along with guidelines, for approval by the General Assembly. The EPC reports to the General Assembly on the implementation of the manual, checks and approves the data collection and usage plans against the manual and advises the WPLs. Moreover, the EPC provides guidelines for data handling and knowledge storage to the partners, while ensuring that the best practices are always followed and provides the appropriate assurance regarding data acquisition, processing, storage, and transmission.

The EPC is chaired by the EM.

The members of the EPC are provided in Table 4.

Table 4: The members of the Ethics and Privacy Committee

Ethics and Privacy Committee		
Partner	Representative	Email
UOWM	Panagiotis Sarigiannidis	psarigiannidis@uowm.gr
DUTH	Ioannis Pragidis	gpragkid@econ.duth.gr
SID	Anastasios Lytos	alytos@sidroco.com
PPC	Michael Angelopoulos	m.angelopoulos@dei.com.gr
TCD	Paul Liston	pliston@tcd.ie
Bi2S	Ioannis Neokosmidis	i.neokosmidis@bi2s.eu
JRC	Tilemahos Efthimiadis (Chairman and EM)	Tilemahos.EFTHIMIADIS@ec.europa.eu
CERTH	Dimosthenis Ioannidis	djoannid@iti.gr
CW	Peter Rosengren	peter.rosengren@checkwatt.se

2.1.5. External Advisory Board

The EAB consists of three well-known external, independent experts from the domain of energy and economics. The board closely monitors and provides consultation to the innovation and technological development activities performed by the consortium participants throughout the project's lifecycle.

The EAB will be set up until M06 (May 2021).

2.2. EVIDENT Management Roles

2.2.1. Project Coordinator

The PC is responsible for the overall coordination, external communication and management of the project.

In particular, the PC oversees the inter-partner cooperation and maintains the liaisons with subcontractors and the funding authorities. Moreover, the PC undertakes to prepare and assess the progress reports, chairs project meetings and represents the consortium to public event and dissemination activities.

In terms of the financial administration, the PC is obliged to report to the General Assembly. Thus, he acts as the interface between the consortium and the financial department of the coordinating partner to ensure that all payments are timely made, that the accurate amounts were received by the partners, and takes any measure necessary to correct any possible contingency.

Finally, in terms of the technical coordination, the PC shall report to and be accountable to the ICB and works closely with the WPLs. This close collaborative work includes the management of dependencies between various tasks, coordination of the project work, review and approval of project reports and deliverables, and resolution of problems of all kinds. In this context, the PC conveys directives and recommendations to the QM to ensure the maximum quality of the project outcomes.

The PC of EVIDENT is Prof. Panagiotis Sarigiannidis (UOWM).

2.2.2. Technical Manager

The TM is responsible for orchestrating the technical and research activities of the consortium, ensuring that the WPs function as a coherent whole as well as that the technical objectives are met with quality and timely. Moreover, the TM should also ensure that technical interdependencies among WPs are satisfied and is responsible for implementing the required procedures to resolve any technical issue.

The TM of EVIDENT is Prof. Ioannis Pragidis (DUTH).

2.2.3. Quality Manager

The QM is responsible for implementing the provisioned quality procedures of EVIDENT. The QM oversees the setting of quality indicators in all scopes and measures the evolution of the project according to the quality indicators and metrics. The QM reports to the PC and the General Assembly about any significant deviation to be corrected and elaborates the risk identification and management plan by including contingency plans.

The QM of EVIDENT is Dr. Dimos Ioannidis (CERTH).

2.2.4. Business Development Manager

The Business Development Manager (BDM) is responsible for planning the required actions needed for the commercial exploitation of the project outcomes. In particular, the BDM is responsible for conducting the business plan for the EVIDENT solution and providing the business strategy, that is necessary to ensure commercial success.

The BDM of EVIDENT is Dr. Ioannis Neokosmidis (Bi2S).

2.2.5. Evaluation Procedures Manager

The EPM is responsible for advising and guiding the data collections and final analysis of EVIDENT, providing expertise in experimental design. Moreover, the EPM will guarantee that the deliverable peer-review procedure will be conducted appropriately as defined in subsection 4.3.1, considering potential additions or changes during the EVIDENT's lifecycle. In addition, the EPM will act as problem-solver, discussing and resolving possible issues of the deliverables with the involved partners. Finally, the EPM will guarantee that the internal reviewers have all the necessary details in order to evaluate successfully the relevant EVIDENT deliverable.

The EPM for EVIDENT is Dr. Paul Liston (TCD).

2.2.6. Ethics Manager

The EM is responsible for ensuring that all activities in the context of EVIDENT, including trials, data management and data processing, will be carried out in compliance with the ethical rules that respect privacy, as well with all relevant regulatory constraints under consideration. The EM is also responsible for the communication between the EAB, the EPC and the WPLs.

The EM of EVIDENT is Dr. Tilemahos Efthimiadis (JRC).

2.2.7. Work Package Leaders

The WPLs are responsible for ensuring and coordinating the appropriate technical work in each EVIDENT WP. It is noteworthy that each WPs is divided into specific tasks and deliverables that are accompanied by the corresponding TLs and Deliverable Leaders (DLs). Therefore, WPL communicates with each TL and DL in order to ensure the quality of each task/deliverable based on the directions and the time defined in the GA. The WPLs will organise periodic or ad-hoc meetings, as required for the execution of the WPs. Finally, the WPLs report to the PC the WP progress, the use of resources and relevant management issues. Finally, WPLs contribute to the periodic reports to the EC.

2.2.8. Data Protection Officers

The Data Protection Officers (DPOs) are defined in each organisation of the EVIDENT consortium, respectively. The main role of DPO is to ensure that the corresponding organisation processes and handles the personal data based on the applicable data protection rules. Moreover, DPOs should guarantee that the data objects and controllers are adequately informed about the respective rights, responsibilities, and obligations.

3. Documents of Reference

All rights and obligations that apply to the entities participating in the EVIDENT project are provisioned in three documents, namely:

- The GA, which defines the contractual obligations with the EC.

- The CA, which is an internal agreement between the EVIDENT consortium members.
- The Deliverable 8.1 (D8.1): Project Management Handbook, which aims to complete the aforementioned documents, providing (a) the project management structure, (b) the deliverable review and submission procedure, (c) the management and collaboration tools and (d) the EVIDENT templates.

3.1. Grant Agreement

The GA defines the rights, the obligations, the conditions, and the terms that are applicable to the grant awarded to the beneficiaries for implementing the action. It has been signed by the EC and the beneficiaries of the action.

It is composed of seven parts:

1. Terms and Conditions
2. Annex 1: Description of the action
3. Annex 2: Estimated budget for the action
4. Annex 3: Accession Forms
5. Annex 4: Model for the financial statements
6. Annex 5: Model for the certificate on the financial statements
7. Annex 6: Model for the certificate on the methodology

3.2. Consortium Agreement

The CA is a document that has been jointly accepted and signed by all partners and shall continue in force and effect until the complete fulfilment of all obligations undertaken by the parties under the GA.

The purpose of the CA is to specify with respect to the project the relationship among the parties, in particular concerning the organisation of the work between the parties, the management of the project and the rights and obligations of the parties concerning inter alia liability, access rights and dispute resolution supplementing where appropriate the provisions of the GA concerning access rights and to set out rights and obligations of the parties supplementing but not conflicting with those of the GA.

It consists of fifteen sections:

1. Definitions
2. Purpose
3. Entry into force, duration & termination
4. Responsibilities of Parties
5. Liability towards each other
6. Governance structure

7. Financial provisions
8. Results
9. Access rights
10. Non-disclosure of information
11. Miscellaneous
12. Signatures
13. Attachment 1: Background included
14. Attachment 2: Accession document

3.3. D8.1 – Project Management Handbook

D8.1 – Project Management Handbook refers to this document.

4. Project Management Tools and Procedures

4.1. Reporting Periods and Periodic Reports

In the EVIDENT project, the following reporting periods are defined:

- Reporting Period 1 (RP1): from month 1 to month 18
- Reporting Period 2 (RP2): from month 19 to month 36

At the end of the project, a Final Report must be submitted within 60 days following the end of the last reporting period.

A technical and financial periodic report must be submitted within 60 days following the end of each reporting period.

Internal reporting processes concern administrative issues, as well as matters of technical & scientific nature.

Regarding the reporting of scientific and technical nature issues, it follows the basic principles of the decision-making process. The task leaders are responsible for reporting to the WPLs, who in turn are responsible for reporting to the TM. The TM is responsible for reporting to the TMC, which in turn reports to the General Assembly.

4.2. Meetings

4.2.1. General Assembly Meetings

The General Assembly will convene at least twice a year and at any time upon written requires of the PC or one third (1/3) of the members of the General Assembly.

The General Assembly meetings are physical or virtual/remote (teleconferences), considering possible travel recommendations and solutions due to emergency situations (e.g., the COVID-19 pandemic). Meetings related to the different activities of EVIDENT will be organised during the same set of days to minimise the travel expenses, but in clearly separated sessions. In the case of physical meetings, the meeting locations will rotate through the partners' sites.

In addition to physical meetings, the EVIDENT consortium will make use of teleconference platforms that allows screen sharing. It is noteworthy that apart of the General Assembly members defined in Table 1, other members of each organisation participating in EVIDENT can join the General Assembly meetings to discuss technical and administrative details of the project.

4.2.2. Hosting Physical Meetings

The physical meetings should follow the following rules:

- The appointed location should be reachable to avoid extra costs. The host is obliged to inform the participants regarding any logistic information involved on how to reach the venue of the meeting.
- The costs of hosting the meeting will be covered by the hosting partner and the travel costs will be covered by each participant.
- The host is obliged to provide a suitable meeting room with audio-visual equipment to present the material to be discussed, as well as internet connectivity.
- It is also recommended (general practice although not obligatory) to provide water, coffee breaks and lunch and to organise one social event (e.g., invite partners for one evening meal).

4.2.3. Meeting Minutes

The chairperson must produce written minutes of each meeting, which are considered the formal record of all decisions made. They should send the draft minutes to all participants within 15 calendar days of the meeting.

The minutes will be considered as accepted if, within 15 calendar days from sending, no member has sent any objection in writing to the chairperson with respect to the accuracy of the draft of the minutes.

The chairperson should send the accepted minutes to all participants and to the PC, who shall safeguard them. If requested, the PC shall provide authenticated duplicates to the consortium partners.

Minutes are kept for all meetings (physical and virtual/remote (teleconferences)) in a compact and easy-to-read format, according to the template provided by D8.1.

4.3. Deliverables Review and Submission Procedure

Each deliverable should be reviewed by two internal reviewers, the QM, and the PC, before the final submission to EC. In special cases, an external expert may be invited instead.

If shortcomings in quality are found, the responsible DL will be informed within a pre-defined period, at two weeks maximum, to be able to proceed to the necessary amendments.

4.3.1. Deliverable Peer Review Procedure

The peer-review procedure of the EVIDENT deliverables is summarised in the following steps:

1. The lead beneficiary of the deliverable (DL) should forward the draft deliverable to all internal reviewers, the EPM, the QM and the PC, 20 days before its official due date.
2. After the control of EPM regarding the material sufficiency in order to review the deliverable, the internal reviewers, within 5 working days, should prepare a draft peer review document, by using the provisioned template (provided by D8.1) and forward it to the QM and the PC.
3. The QM and the PC should make the synthesized report with all comments within 5 working days and forward it to the lead beneficiary.

4. Within 3 days, the corrections should be incorporated within the specific deliverable by the lead beneficiary, who should also complete the peer review report by filling the “Response to Reviewers’ Comments” fields.

4.3.2. Deliverable Editing and Review Assignments

Each deliverable has been assigned a partner responsible for editing it. It has also been assigned two partners for reviewing it, as shown in Table 5.

Table 5: Deliverable editing and review assignment

Deliverable Number	Deliverable Title	WP Number	Lead Beneficiary	Type	Dissemination Level	Reviewer 1	Reviewer 2
D1.1	Analysis of best practices	WP1	UOWM	Report	Public	Dimosthenis Ioannidis (CERTH)	Anastasios Lytos (SID)
D1.2	Assessing behavioural biases and financial literacy	WP1	DUTH	Report	Public	Panagiotis Radoglou-Grammatikis (UOWM)	Michail Angelopoulos (PPC)
D1.3	Specifications of big data analytics	WP1	CERTH	Report	Public	Paul Liston (TCD)	Anastasios Lytos (SID)
D2.1	Field studies, serious game and surveys protocols design and pilots design	WP2	TCD	Report	Public	Dimosthenis Ioannidis (CERTH)	Anastasios Lytos (SID)
D2.2	Optimized protocols design	WP2	TCD	Report	Public	Paris Karypidis (DUTH)	Tilemahos Efthimiadis (JRC)
D2.3	Serious game implementation design	WP2	TCD	Report	Public	Dimosthenis Ioannidis (CERTH)	Michail Angelopoulos (PPC)
D3.1	Specifications of preparatory actions for RCT, surveys and serious game	WP3	TCD	Report	Public	Dimosthenis Ioannidis (CERTH)	Michail Angelopoulos (PPC)
D3.2	Implementation of preparatory actions for RCT, surveys and serious game	WP3	DUTH	Report	Public	Dimosthenis Ioannidis (CERTH)	Anastasios Lytos (SID)
D3.3	Data collection and management	WP3	DUTH	Report	Public	Michail Angelopoulos (PPC)	Tilemahos Efthimiadis (JRC)

D4.1	Analytical qualitative and quantitative tools requirements (econometric models)	WP4	DUTH	Report	Public	Ioannis Neokosmidis (Bi2S)	Peter Rosengren (CW)
D4.2	Econometric analysis and robustness tests	WP4	DUTH	Report	Public	Paul Liston (TCD)	Tilemahos Efthimiadis (JRC)
D4.3	Updated econometric methodologies and robustness tests	WP4	DUTH	Report	Public	Paul Liston (TCD)	Tilemahos Efthimiadis (JRC)
D4.4	Analytical usage handbooks for tools and datasets	WP4	DUTH	Report	Public	Panagiotis Radoglou-Grammatikis (UOWM)	Anastasios Lytos (SID)
D5.1	Impact evaluation plan and policy measures	WP5	JRC	Report	Public	Ioannis Neokosmidis (Bi2S)	Panagiotis Radoglou-Grammatikis (UOWM)
D5.2	Updated impact evaluation plan and policy measures	WP5	JRC	Report	Public	Ioannis Neokosmidis (Bi2S)	Anna Triantafyllou (UOWM)
D5.3	Data documentation	WP5	CERTH	Report	Public	Tilemahos Efthimiadis (JRC)	Paris Karypidis (DUTH)
D5.4	Updated data documentation	WP5	CERTH	Report	Public	Tilemahos Efthimiadis (JRC)	Paris Karypidis (DUTH)
D6.1	Architecture, design and integration documentation	WP6	SID	Report	Public	Paris Karypidis (DUTH)	Michail Angelopoulos (PPC)
D6.2	Crowdsourcing Tools of EVIDENT platform	WP6	SID	Other	Public	Paul Liston (TCD)	Peter Rosengren (CW)
D6.3	Gamification Tools of EVIDENT platform	WP6	SID	Other	Public	Dimosthenis Ioannidis (CERTH)	Tilemahos Efthimiadis (JRC)
D6.4	Datahub Services of EVIDENT platform	WP6	SID	Other	Public	Michail Angelopoulos (PPC)	Ioannis Neokosmidis (Bi2S)
D6.5	Verification and Validation Report	WP6	CERTH	Report	Public	Anastasios Lytos (SID)	Ioannis Neokosmidis (Bi2S)

	for final version of EVIDENT platform						
D7.1	Project Communication Kit	WP7	Bi2S	Websites, patents filling, etc.	Public	Peter Rosengren (CW)	Anastasios Lytos (SID)
D7.2	Report on dissemination and impact assessment	WP7	Bi2S	Report	Public	Paul Liston (TCD)	Paris Karypidis (DUTH)
D7.3	Update on dissemination and impact assessment report	WP7	Bi2S	Report	Public	Paul Liston (TCD)	Paris Karypidis (DUTH)
D7.4	Exploitation and market analysis report	WP7	Bi2S	Report	Confidential	Peter Rosengren (CW)	Panagiotis Radoglou-Grammatikis (UOWM)
D7.5	Update on exploitation and market analysis report	WP7	Bi2S	Report	Confidential	Peter Rosengren (CW)	Panagiotis Radoglou-Grammatikis (UOWM)
D8.1	Project Management Handbook	WP8	UOWM	Report	Public	Michail Angelopoulos (PPC)	Paris Karypidis (DUTH)
D8.2	Project Scientific/Technical Plan	WP8	DUTH	Report	Public	Ioannis Neokosmidis (Bi2S)	Panagiotis Radoglou-Grammatikis (UOWM)
D8.3	Data Management Plan	WP8	UOWM	Report	Confidential	Dimosthenis Ioannidis (CERTH)	Peter Rosengren (CW)
D8.4	Progress report	WP8	UOWM	Report	Confidential	Paul Liston (TCD)	Paris Karypidis (DUTH)

4.4. Events That Must Be Immediately Reported

Regarding any events that might significantly affect or delay the implementation of appointed tasks or the European Union (EU) financial interests, there must be an immediate report forwarded to the PC, who will later inform the Project Officer (PO) and the EVIDENT consortium.

- Altering the Legal Entity Appointed Representative (LEAR).
- Altering legal, financial, technical, organizational or ownership situation or those referred to linked third parties.

- Altering the name, address, legal form, organization type of its linked third parties.
- Any action or circumstance that may affect awarding the grant or be kept in line with the requirements under the GA.

Furthermore, the Portal Beneficiary Register should be kept up to date by all beneficiaries and more specifically regarding personal information concerning their names, addresses, legal representatives, legal forms, and organization types.

4.5. Project Management and Communication Tools

4.5.1. Mailing Lists

The EVIDENT project uses mailing lists per WP and for administrative and financial issues. The mailing lists are listed below:

- WP1: evident-wp1@lists.uowm.gr
- WP2: evident-wp2@lists.uowm.gr
- WP3: evident-wp3@lists.uowm.gr
- WP4: evident-wp4@lists.uowm.gr
- WP5: evident-wp5@lists.uowm.gr
- WP6: evident-wp6@lists.uowm.gr
- WP7: evident-wp7@lists.uowm.gr
- WP8: evident-wp8@lists.uowm.gr
- General Assembly: evident-general-assembly@lists.uowm.gr
- Administrative/Financial: evident-admin@lists.uowm.gr
- All Consortium Members: evident-all@lists.uowm.gr

If needed, future mailing lists will be created for the purpose of the project.

4.5.2. Collaboration Management Platform

A common collaboration space is available for the EVIDENT partners to share documents and get all available information, both public and confidential, using the Confluence software. This web-based workspace allows users to upload documents, share files and organise the information in sections for easy collaborative editing.

The Confluence working space of EVIDENT includes the following sections:

- A contact list, including a list of every person involved in EVIDENT, their affiliation and the contact details.

- A page for each WP, that includes the deliverables organised per task. The working and under-submission deliverables should be shared amongst the consortium partners by uploading them to the corresponding pages of these sections.
- The budget, the Person Months (PMs) effort and the Gantt chart.
- The official documents, including the GA, the CA, and the GA amendments.
- The EVIDENT templates that should be used for preparing presentations, deliverables, and internal reports.
- The EVIDENT logo.
- The page “Photos” should be used by partners to upload photos that can be utilised to boost the dissemination activities (e.g., photos from the pilots, dissemination events, etc.).
- The Plenary Meeting page accumulates agendas, minutes, and presentations from each biannual meeting.

The structure of the Confluence workspace might change during the project lifetime to assure an effective way of working between the members of the EVIDENT consortium.

Considering that the collaboration platform stores confidential documents (i.e., documents that must be accessible only by members of the EVIDENT consortium and EC), access to this workspace is granted only to the project members, to prevent the leak of sensitive data.

The collaboration management platform is hosted and maintained by UOWM.

Figure 2 depicts a screenshot of the Confluence workspace for the EVIDENT project.

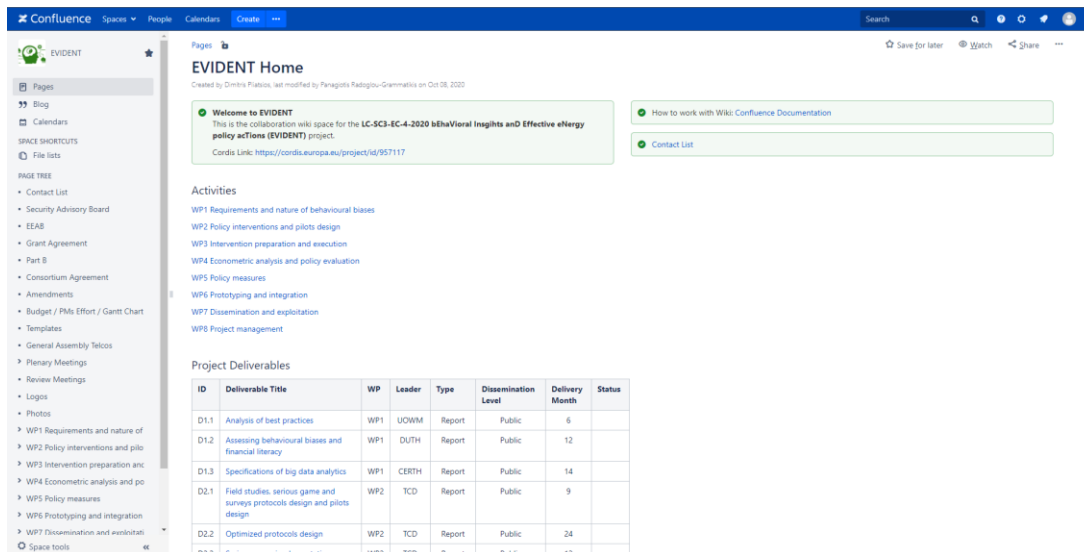


Figure 2: The EVIDENT page on Confluence

4.5.3. Teleconference Platform

Zoom Video Communications is a company operating from San Jose, California that provides remote conferencing services using cloud computing. Zoom offers communications software that combines video conferencing, online meetings, and mobile collaboration.

The participants can join a meeting by opening the corresponding Uniform Resource Locator (URL) of the meeting, provided by email or other means. To join the meeting, a Zoom client is required that is being downloaded automatically and is supported by multiple operating systems (Windows, Mac, Linux, Android, and iOS).

Alternatively, the participants are also able to join by audio, by dialling in from regular phones. Each scheduled meeting has a unique 9, 10, or 11-digit number called Meeting ID and generated by the host. This number is required for joining the meeting.

All partners wishing to initiate a teleconference should contact the PC to schedule the telco. In any case, the telco organiser sends out an e-mail with the meeting URL to all intended attendees well in advance, through the provisioned mailing lists.

Prof. Panagiotis Sarigiannidis is the contact point for any telco arrangements.

Figure 3 depicts the usage of the Zoom software.

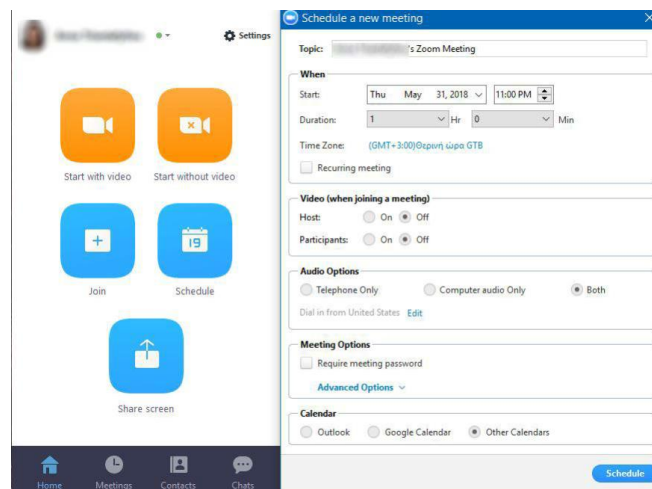


Figure 3: Usage of the Zoom software

4.5.4. Version Control Repository

The Bitbucket software aims to assist the code development and collaboration within the technical activities of the EVIDENT consortium. Bitbucket allows users to create an unlimited number of projects, both private and public. The technical partners can pull requests to edit code, publish reviews and discuss specific projects or pulls.

Bitbucket is a self-hosted service maintained and provided by UOWM.

Figure 4 is a screenshot from the landing page of the Bitbucket platform.

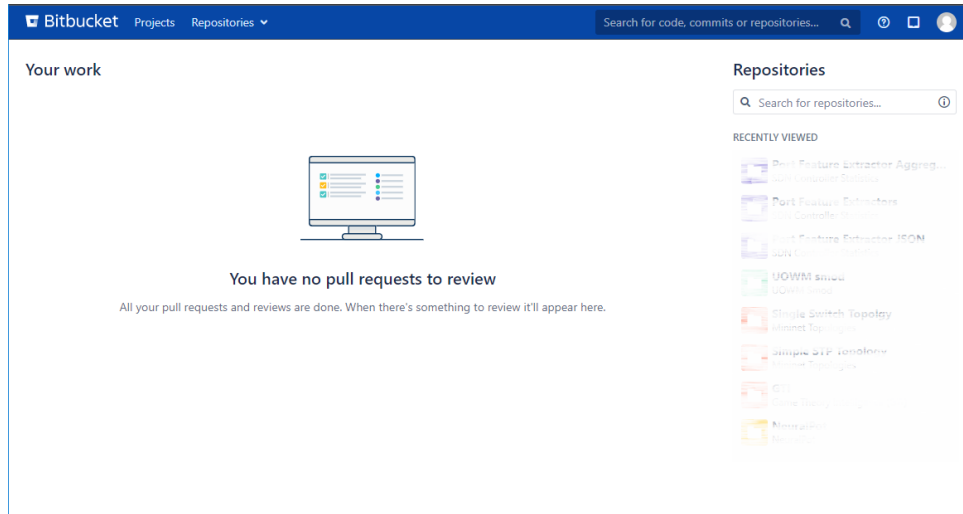


Figure 4: The landing page of Bitbucket

5. Documentation and Dissemination

This section provides the necessary information needed by the consortium partners to prepare documents related to the project as well as to participate in dissemination events.

5.1. Documentation Templates

The documents and presentations to be produced within the project will be created and edited using Microsoft Office Word and PowerPoint, version 2007 or newer, or compatible.

The documents will be edited in docx format, while presentations will be produced in pptx format. Specific templates are provisioned for each kind of document (presentation, deliverable, internal report, internal review, minutes of meeting), ensuring common visual identity and consistency in the consortium.

The project’s templates are accessible through the following link:

<https://space.uowm.gr/confluence/display/evidenth2020/Templates>

Calibri is the main font that applies to all templates.

5.2. File Naming Conventions and Versioning

The file name of the documents shared within the consortium is advised to follow specific conventions to achieve efficient ordering, processing and mitigate human errors. The file name of the document will contain:

- First letters: EVIDENT

- Next 3-4 digits: “WP/<T>/<D>”, where <T> is the number of task and <D> is the number of the deliverable.
- Next digits: Document’s short title
- Next 2-3 digits: “v” and number of revisions.
- Next 3-6 digits: Short name of the partner publishing the revision, within brackets.
- Spaces should be replaced with underscore “_” to ensure compatibility in non-desktop environments

For example: “EVIDENT_D8.1_Project_Management_Handbook_v1_[UOWM].docx” refers to the first version of D8.1 prepared by UOWM.

Unless a deliverable is submitted, the versioning should be less than 1. For example, the partner that first contributes to a deliverable should assign the version v0.1. The succeeding partners editing the document should increment the version by 0.1, e.g., v0.2, v0.3 etc. Only the version that will be delivered to the PC for submission to EC should have the v1.0 version. If a deliverable is rejected and resubmitted, then revision tags like v1.1 or v2.0 should be used, depending on the grade of revision.

5.3. Dissemination Policy (Article 38 of GA)

Unless the Agency requests or agrees otherwise or unless it is impossible, any communication activity related to the action (including in electronic form, via social media, etc.) and any infrastructure, equipment and major results funded by the grant must:

- (a) display the EU emblem and
- (b) include the following text:

For communication activities:

“This project has received funding from the European Union’s Horizon 2020 research and innovation programme under grant agreement No 957117”.

For infrastructure, equipment, and major results:

“This [infrastructure][equipment][insert type of result] is part of a project that has received funding from the European Union’s Horizon 2020 research and innovation programme under grant agreement No 957117”.

When displayed together with another logo, the EU emblem must have appropriate prominence.

Furthermore, any communication activity related to the action must indicate that it reflects only the author's view and that the Agency, and the Commission is not responsible for any use that may be made of the information it contains.

The EVIDENT partners are strongly advised to study Article 38 of GA to ensure compliance of their dissemination activities with the requirements described in the GA. Deviations and breaches of those obligations might lead to grant reduction and other measures as described in Chapter 6 of the GA.

5.4. Consortium Logo

Figure 5 illustrates the logo that will be utilized by the EVIDENT consortium as a visual identification of the consortium. This logo, as well as other variations of that logo, can be found under the following link:

<https://space.uowm.gr/confluence/display/evidenth2020/Logos>



Figure 5: The EVIDENT logo

6. Conclusions

This document provides a set of guidelines that will be adopted for the efficient and transparent governing of the project. It intends to complement both GA and CA. The document introduces the project management structure, considering the provisions in GA and CA. Next, it highlights the document that should be re-checked and referred by the consortium, including (a) GA, (b) CA and (c) this deliverable. Subsequently, the project collaboration tools and procedures are specified, including (a) meetings, (b) templates, (c) deliverable review and submission procedure, (d) collaboration management platform (i.e., Confluence), (e) teleconference tool (i.e., Zoom), (f) version control repository (i.e., Bitbucket) and (g) the EVIDENT templates.

The project team will utilise this deliverable to adopt a common understanding of the procedures and the rules to be fulfilled for the day-to-day project management and execution.