URSOiLL

D8.1 PROJECT MANAGEMENT HANDBOOK

under review

28th February 2026

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Funded by the European Union

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*The labels used:

R = Document, report

DEC = Websites, patent filings, video, etc.

DATA = data sets, microdata, etc.

DMP = Data Management Plan

SEN = Sensitive, limited under the conditions of the Grant Agreement

PU = Public, fully open, e.g., web (Deliverables flagged as public will be automatically published in CORDIS project's page)

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List of Abbreviations

Acronym	Meaning
AE	Affiliated Entity
CA	Consortium Agreement
CFS	Certificate on the Financial Statements
COOT	Coordination Team
D&C	Dissemination and Communication
EC	European Commission
FS	Financial Statement
FTP	Funding and Tenders Portal
GA	Grant Agreement
GenA	General Assembly
GMS	Grant Management Services
HE	Horizon Europe
IPR	Intellectual Property Rights
LL	Living Labs
PC	Project Coordinator
PTC	Project Technical Committee
RP	Reporting Period
WP	Work Package

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1. Introduction

1.1. Purpose

The deliverable D8.1 Project Management Handbook is related to **work package 8 "Project Management"** of the URSOILL project it is an output of task 8.1 "Implementation of an agile responsive project management process," led by RISE.

This deliverable D8.1 gives a quick overview of the most relevant management aspects of the project, setting the rules and responsibilities of the partners aimed at ensuring excellent quality and progress of the work.

This handbook is intended for all URSOILL beneficiaries, affiliated entities, associated partners, WP leaders, LL leaders, and administrative/financial officers involved in project implementation.

This document summarises all the required knowledge for effective project documentation management and contains comprehensive information on the management strategy, consortium governance structure, reporting procedures, risk management, quality management, amendments, etc. Other transversal issues, such as dissemination and communication practices, data management, ethics, Intellectual Property Rights (IPR) and exploitation of results are mentioned in section 8 with references to other documents that will further explain these cross-cutting issues.

The purpose of this guide is to clarify legal and financial aspects of the URSOILL Grant Agreement (GA) in force and the Consortium Agreement (CA) that may need further explanations to beneficiaries[1].

This guide is a 'living' document and can be modified according to the project's needs. This document will be updated and extended if necessary, during the URSOILL project implementation, including relevant issues and changes in the project or procedures. Every time the document is updated, all the partners will be duly informed about the updates and the changes made with respect to the previous version.

DISCLAIMER: This document is a procedural guide based on other projects' documentation (GA and CA) and reference documents of the Horizon Europe Programme (i.e. Annotated Grant Agreement, AGA, for EU funding programmes 2021-2027, Online Manual of the Funding and Tenders Portal, FTP, etc.) and has been adapted specifically for this project. Please note that not all content is original, as some sections have been directly copied from the abovementioned documents.

1.2. Relation to other project documents

In the event of discrepancy between documents, this Project Management Handbook is overruled by the Grant Agreement (GA) No. 101219012 including its Annexes, and the Consortium Agreement (CA).

[1] Both GA and CA are available in the URSOILL' SharePoint, under the folder "00_REFERENCE DOCS". Additionally, the GA can be downloaded from the Funding and Tenders Portal (FTP), in the "Process documents" of the module "Proposal Management & Grant Preparation" at "Archived Processes".

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1.3. Governance structure

Articles 7,8 and 9 of the GA detail the roles and obligations of each member of the URSOILL consortium (currently composed by 27 beneficiaries, 6 affiliated entities, and 1 associated partner) and of other participants that may be involved in the project implementation (subcontractors, recipients of financial support to third parties, third parties providing in-kind contributions, etc.). In addition, to guarantee the proper project management, the URSOILL consortium defined in the CA (Article 6), a governance structure that is composed of the following consortium bodies, whose decision-making hierarchy within the consortium is as follows:

- The **General Assembly (GenA)** is the ultimate decision-making body.
- The **Project Coordinator (PC)** is the legal entity acting as the intermediary between the Parties and the Granting Authority. The Project Coordinator shall, in addition to its responsibilities as a Party, perform the tasks assigned to it as described in the Grant Agreement and this Consortium Agreement.
- The **Project Technical Committee (PTC)** consisting of WP leaders and LL leaders, advises and supports the Coordinator on operational and management issues but operates under the authority and decisions of the General Assembly.

1.4. General Assembly

GenA is the ultimate decision-making board of the project and will involve at least **one representative of each entity participating in the consortium** and will be chaired by the Project Coordinator. This management body will be:

- Supporting the PC in fulfilling the obligations towards the EC, including budget-related matters.
- Assisting in the elaboration and approving financial and technical reports prior to their submission to the EC.
- Monitoring tasks execution and general project development, proposing corrective actions and appropriate amendments to the work plan in agreement with the EC in order to meet URSOILL objectives.
- Making decisions about premature termination of the project or the exclusion of defaulting partners.
- Proposing a replacement to the EC when the PC fails in executing properly its tasks.
- Making decisions about other strategic or long-term issues.

1.5. Project Coordinator

The Project Coordinator (PC) is the legal entity acting as the intermediary between the Parties and the EC. The PC is obliged to perform the tasks assigned to the role as it is described in article 6.4 of the URSOILL GA and the CA in addition to the responsibilities as a party. In particular, the Project Coordinator shall:

- Act as the first contact point for EC services.
- Monitoring compliance by the Parties with their obligations

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- Keeping the address list of Members and other contact persons updated and available
- Collecting, reviewing to verify consistency and submitting reports, other deliverables (including financial statements and related certification) and specific requested documents to the Granting Authority
- Preparing the meetings, proposing decisions and preparing the agenda of GenA meetings, chairing the meetings, and monitoring the implementation of decisions taken at meetings
- Preparing the meetings and the agenda of Work Package Leaders group meetings
- Transmitting promptly documents and information connected with the project to any other Party concerned, ensuring that all consortium members, including non-PTC partners, are kept informed about the project's progress and requirements
- Administering the financial contribution of the Granting Authority and fulfilling the financial tasks described in Section 7.2
- Providing, upon request, the Parties with official copies or originals of documents that are in the sole possession of the Coordinator when such copies or originals are necessary for the Parties to present claims.
- Providing a copy of the Grant Agreement and its Annexes to the Associated Partners, marked as 'Confidential' initiating, coordinating, and organizing the meetings.
- Facilitating decision-making.
- Preparing the minutes of the meetings.
- Guiding, initiating, and coordinating research and other activities, particularly those related to the publication of project results and cooperation with external actors.
- Follow-up/adaptation of the planning and monitoring of progress on all Work Packages (WPs).
- Setting in place management procedures.
- Monitoring the expenses for the reporting period every 6 months is linked with the GenA.
- Payments to the partners.
- Assistance to the participants concerning administrative aspects.
- Assistance to partners concerning technical and financial setbacks and eventualities.

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In case of absence of the designated Coordinators, a substitute will be appointed by RISE and communicated to the Consortium.

The project coordination is executed by RISE, and the designated **coordinators** are **Dr. Nargish Parvin and Dr. Tora Råberg**. Together, they have extensive experience in EU-funded projects, having contributed to and supported the management of several Horizon projects over the past years. Currently, they are lead coordinators for Swedish agricultural LL for ICOSHELLs project and they have secured 12 million Euro for this EU funded project. Nargish also serves as an independent expert for the European Commission (REA), contributing to the evaluation of multidisciplinary postdoctoral proposals and consensus panels.

The PC will be supported by ZABAL, which t will act as Project Secretary, proving day-to-day assistance to the overall project management. Both entities, RISE and ZABALA, form the **Coordination Team (COOT)**. ZABALA will carry out the assistance and coaching in financial/legal aspects during project meetings. Explanation of procedures regarding justification and eligibility costs, records, requirements of audit certificates. ZABALA will Support to all the LEARs and PLSIGNs in the use of the participant portal. ZABALA will collect the draft cost statements

prepared by beneficiaries to revise and integrate them into a single document for the final revision carried out by the PC to approve them. Collection of Certificates on the financial statements (CFS) if required. Supporting RISE in the identification of risks that would require an amendment or information letters to the EC.

1.6. Project Technical Committee

The Project Technical Committee (PTC) shall support the Coordinator in preparing meetings with the EC and in preparing related data and deliverables, while ensuring that all partners, including non-PTC members, fulfil their respective deliverable responsibilities. The PTC is composed of the **PC**, the **Work Package (WP) leaders** (IUE, RISE, Cetenma, Zabala, TUM, ATB-Postdam, Greenovate-Europe) and the **Living Labs (LL) leaders** (RISE, Clube, Innovhub-SSI, LIST, ESKILARA, CITTADITO).

1.6.1. WP Leaders

Each WP has a lead beneficiary in charge of the coordination of the tasks. They will coordinate partners interaction within the WP and tasks and will call for internal WP meetings if required. Project progress will be critically reviewed at each milestone point. Each WP leader is responsible for operational decisions and will guarantee that the partial and total objectives of the WP are accomplished, elaborating the reports of the WP and organizing the presentation of results. They are also responsible for the coordination of the deliverables associated with each WP.

The role of the WP Leaders is to:

- Coordinate and supervise the work performed within the WP or tasks according to the time of the deliverable.
- Oversee the technical activities within their WP, ensuring that all tasks meet the project's quality standards and technical requirements.
- Regularly report on progress, challenges, and milestones to the PTC and GA. These reports should be prepared quarterly and include updates on task completion, resource utilization, and risk management.
- Coordinate the information flow required by the various interdependencies, with other WP or task leaders.
- Coordinate and approve (preliminarily) the deliverables prepared in the WP.
- Participate in the preparation of the review meetings with the Commission.
- Be responsible for the implementation and risk management of the WP.

1.6.2. LLs leaders

The role of the LLs leaders is to:

- Coordinate and supervise the work performed within the LL according to the tasks and time schedule.
- Monitor the technical quality of the work to achieve the expected results.
- Coordinate the information flow required by the various interdependencies, with other LLs, WP and tasks leader on.
- Inform the WP and task leader on the progress achieved, results obtained, and problems encountered before every PTC meeting.

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- Participate in the preparation of the review meetings with the Commission.

1.7. Project meetings

The URSOILL governance bodies, GA and PTC, will organise periodical project meetings to ensure proper project management. Table 1 summarises the URSOILL project meetings.

Table 1. URSOILL project meetings

Consortium Body	Ordinary meeting	Extraordinary meeting
General Assembly (GenA)	At least once a year	At any time upon request of the PTC or 1/3 of the Members of the GenA
Project Technical Committee (PTC)	At least once a year physically & 6/year virtually	At any time upon request of any Member of the PTC

The chairperson of a Consortium Body will be responsible for:

- **Give** written **notice** of the meeting to the members of the project.
- Preparing and sending the **agenda** with the members of the project.
- Produce the **minutes** of the meeting, which shall be the formal record of all decisions taken. He/she shall send the draft minutes to all Members within 14 calendar days of the meeting. The minutes shall be considered as accepted if, within 15 calendar days from receipt, if no member has sent an objection by written notice to the chairperson. The chairperson shall share the accepted minutes with all the Consortium.

The URSOILL CA in article 6.3.2.3 set the timeline for notifying and sending the agenda of both types of project meetings (GA and PTC).

All the materials concerning the Consortium meetings (agenda, presentations, minutes, etc.) will be available in URSOILL SharePoint within the "Meetings" folder.

1.8. Internal communication

The day-to-day communication within the consortium is done via email.

An updated list of contacts is available in the URSOILL SharePoint (Excel "**00_URSOILL_contacts_list**"). This document contains several contact lists (Excel sheets):

- Coordination Team (RISE + ZABALA)
- Partner contacts (primary and secondary contacts)
- Administrative-Financial reporting
- WP leaders
- LL leaders
- WP1 contacts
- WP2 contacts
- WP3 contacts
- WP4 contacts
- WP5 contacts
- WP6 contacts
- WP7 contacts

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- WP8 contacts

New contacts, changes, and/or corrections to the list of contacts should be done by each beneficiary in the abovementioned document to keep the contact details of beneficiaries involved updated. Moreover, to ensure all of them have access to the project documentation, the changes done in the contact list should be notified to ZABALA, that is responsible for granting them access permission to the SharePoint repository.

Official project decisions must be documented in writing (email or minutes) and archived in SharePoint.

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2. Conflict resolution

Maintaining a good working relationship among all the members of the consortium is essential for swiftly resolving problems and issues. The URSOILL partners are requested to reach an agreement on conflicts internally. However, when this is not possible, problems and conflicts must be addressed systematically.

Conflicts will have to be solved at the lowest level possible, and preferably amicably. If an agreement cannot be reached at a task or WP level, then the Project Coordinator will mediate. If that is not satisfactory, then the GenA will take a decision, and if necessary, it will ask for the authorisation of the European Commission.

However, the definitive conflict resolution mechanism is established in the CA (Section 11.8 – Settlement of Disputes). According to the CA, the Parties shall attempt to settle their disputes amicably. Any dispute arising out of or in connection with the Consortium Agreement which cannot be solved amicably shall be finally settled under the Rules of Arbitration of the International Chamber of Commerce (ICC) by one or more arbitrators appointed in accordance with said Rules. The place of arbitration shall be Brussels, unless otherwise agreed by the conflicting Parties, and the arbitral decision shall be final and binding.

Nothing in the CA limits the Parties' right to seek injunctive relief before any competent court. In cases where a Party is a public body and national law prevents submission to arbitration, the dispute shall instead be submitted to the competent Courts of Brussels, Belgium

All conflict resolution steps will be documented in writing and archived in the “Governance” folder of SharePoint.

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2.1. Information flow chart

All the issues that deviate from the plan of performing tasks and deliverables (problems, delays, etc.) must be communicated from each Partner to the WP leader. The WP leader will be responsible for dealing with the issue raised and solving it. In the case that the issue cannot be solved, the Project Coordinator will be duly informed.

All relevant issues with an impact on the work and planning of the project will be discussed with the corresponding committee without undue delays. The Coordinator Team will resolve the issues put up by the WP Leaders or will transmit them to the EC if necessary.

2.2. Voting rights and quorum

The voting rules and quorum for each of the URSOILL governance bodies are ruled in the Consortium Agreement. A summary of the veto rights and quorum is presented in Table 2:

Table 2. Veto rights and quorum

	Quorum	Voting rights	Decision making	Veto rights
Consortium body	2/3 of its members	1 member = 1 vote*	A majority of 2/3 of the votes cast	Yes

* Associated Partners are excluded from certain decisions of the GenA according to this Consortium Agreement.

3. Project reporting obligations

Monitoring the project execution is an ongoing task that takes place at any moment during the project implementation and beyond. There are contractual tasks that make the project monitoring most relevant at certain periods in the project´s life, such as after each reporting period at the time of payments. In accordance with the Grant Agreement, project reporting obligations with the EC are the following:

- Periodic reporting
- Continuous reporting (deliverables, milestones, risks…)

The Funding & Tenders Portal (FTP) is the entry point for electronic administration of EU-funded research and innovation projects and hosts the services for managing projects throughout their lifecycle. It is highly recommended that all individuals participating in the URSOILL project have an ECAS account or recently change to EU Login[2]. The roles and access rights that a user have are detailed in Annex 1. Funding & Tenders Portal roles of this document can also be checked after logging in to the ECAS/EU Login account on the FTP under the "My Roles" button (under the button bearing the name of the user).

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3.1. Periodic reporting

Periodic Reporting is the pre-condition for receiving payments. After the end of each reporting period, within 60 days after the end of the reporting period, a Periodic Report shall be submitted to the EC by the project coordinator.

The **reporting periods (RP)** of the URSOILL project, defined in the Data sheet (point 4.2 Periodic reporting and payments) of the GA, are summarised in Table 3:

Table 3: Reporting periods of the URSOILL Project.

No. RP	Months covered by the RP	Submission deadline to EC
RP1	M1 – M18: September 2025 – February 2027	29th April 2027
RP2	M19 – M36: March 2027 – August 2028	30th October 2028
RP3	M37 – M54: September 2028 – February 2030	29th April 2030

At the end of each reporting period, the Commission shall evaluate and approve periodic reports and distribute the corresponding payment (see the URSOILL payments scheme in the article 7.2.2 of the CA). In the case that the Commission requests any further information, clarification or documentation on the periodic report, the time will be stopped from the Commission's side, restarting the countdown upon reception of the requested information.

Moreover, after the submission of each Periodic Report, a **Review Meeting** with the EC will be scheduled to validate the proper project implementation and compliance with the obligations

[2] See instructions to create an ECAS account in this link: How do I create my EU Login account? - European Union

under the GA. The Project Officer will formally notify the Project Coordinator and agree on an appropriate date, venue, and contents of the Project review. The granting authority may be assisted by independent, outside experts familiar with the domain of the Project. The potential URSOILL project reviews meetings will be defined in accordance with the PO.

3.1.1. Content of periodic reports

The content of the Periodic reports is compulsory and determined by the Commission in Article 21.2 of the Grant Agreement. A template of the Periodic report can be downloaded from the Reference Documents of the Horizon Europe Programme in the FTP (link). The structure of the Periodic Report contains the technical and financial reports, and it is as follows:

The Technical Report consists of 2 parts:

- **Part A** contains structured tables with project information (deliverables, milestones, risks, dissemination and communication activities...) and is generated by the Portal. It is based on the information entered the Continuous Reporting and the Periodic Reporting modules of the Grant Management Services (GMS) of the FTP. G!E will provide the Word Template to have the same coherence structure for all WPs and will be stored in the URSOILL SharePoint.
- **Part B** is a narrative description of the work carried out during the reporting period. Part B (+ annexes) must be uploaded (in pdf format) on the Technical Report (Part B) screen. The part B template to be used for each reporting period must be downloaded from the Periodic Reporting module of the FTP.

The Financial Report consists of:

- Individual financial statements (Annex 4 to the GA see the Template in 00-Reference Docs, 00-Grant Agreement) for each Beneficiary and Affiliated Entity (AE).
- An explanation of the use of the resources (or a detailed cost reporting table from each beneficiary), if required.
- A periodic summary (consolidated) financial statement including the request for payment.
- For some beneficiaries, a Certificate on the Financial Statements (CFS) (if the threshold is reached; in Horizon Europe CFS is mandatory only at the final payment if a beneficiary or affiliated entity requests EU contribution to costs ≥ EUR 430 000).
- If requested by the EC at the final payment, the Project Coordinator will fill and submit a report on the distribution of payments. The template can be downloaded from this link to the Reference documents of the Horizon Europe Programme.

The Financial Report is generated by the Portal based on the financial information entered into the Periodic Reporting module (and any other documents uploaded, e.g. CFS).

3.1.2. Preparation and submission processes

The main steps for the preparation and submission of the periodic reports are:

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Notification: all beneficiaries receive a notification at the end of the period.

All beneficiaries:

- **contribute to the Technical Part of the Periodic Report**
- **complete their own Financial Statement and sign (the Project Financial Signatory, (PFSIGN), of each beneficiary) and submit their Financial Statements to the Coordinator (see further instructions in Annex 2).**

The Coordinator approves and submits the elements of the Periodic Report to the EU Services.

The EU Services review the submitted Periodic Report and accept or reject it. Periodic Payment (including final).

DATA COLLECTION AND RESPONSIBILITIES

For the preparation of the periodic period reports, technical and financial inputs are necessary from all beneficiaries, who must contribute to the periodic report.

Technical information

The COOT will launch the process of collecting technical inputs for the elaboration of the technical report at the **end of M18, M36** and **M54,** even if an earlier launch might occur if considered**.** The **workflow** that shall be followed for the preparation of the technical report is:

Part A (online):

1. **The COOT will share a template with the Consortium partners to gather inputs.**
2. **All project participants will contribute to Part A within the requested internal timeline (normally 30 days before the submission date of the periodic report).**
3. **The COOT will gather all the inputs for its revision and approval.**
4. **Then, the COOT will upload the data into the Funding & Tenders portal.**

Part B (PDF):

1. **The COOT will share a template with the Consortium partners to gather inputs.**
2. **WP leaders will contribute to Part B within the requested internal timeline (normally 30 days before the submission date of the periodic report). WP leaders are responsible for requesting the required inputs from other participants within their WP. All WP participants are responsible for providing the WP leader with the required information within the requested timeline.**
3. **The WP leader will send his/her WP information to the Project Coordinator.**
4. **The Project Coordinator will review the WP information and provide feedback and comments to the WP leader.**
5. **The WP leader will then prepare the final version and share it with the Project Coordinator.**
6. **The Project Coordinator will send the final version of the WP's information to the COOT, who will gather all the information into a single document and proceed with the quality check.**
7. **The COOT will send the final version of the Part B to the Project Coordinator, who will give green light for uploading it on the Funding & Tenders portal**

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8. **Then, the Coordinator will upload the PDF into the Funding & Tenders portal.**

The technical information workflow is represented below:

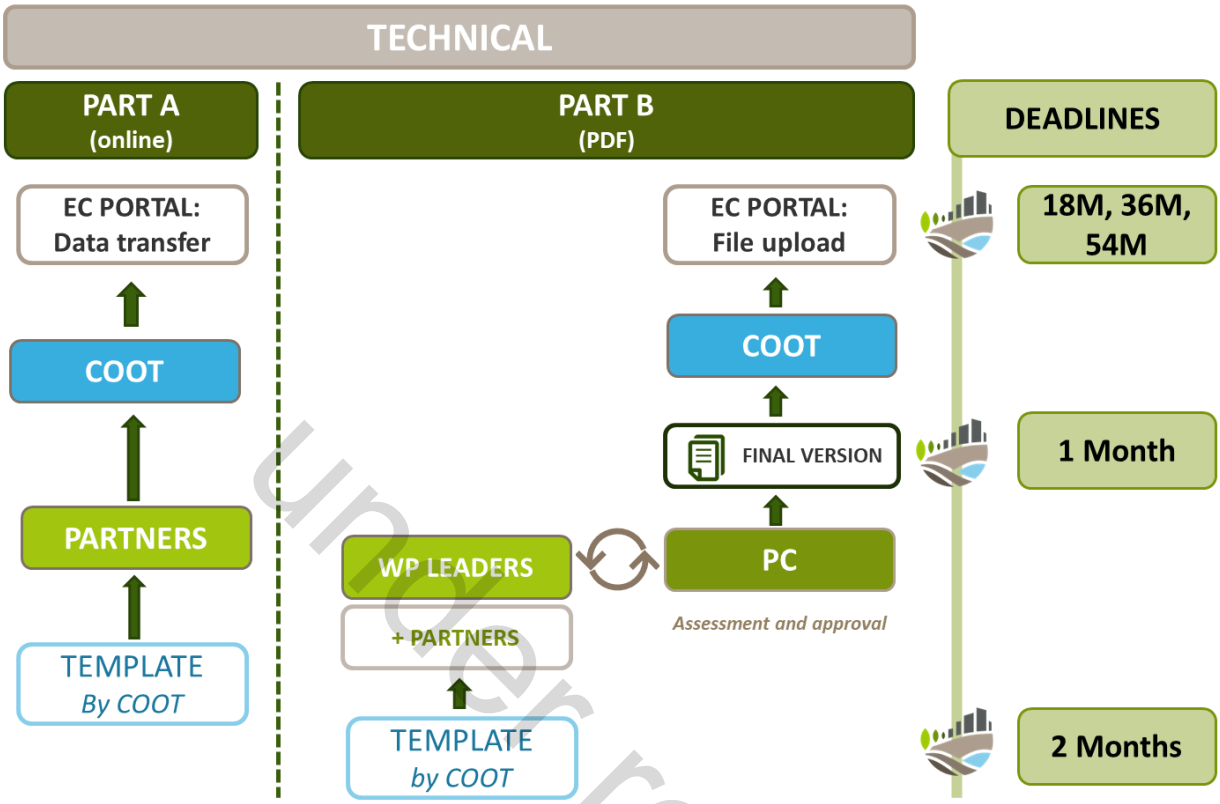

Figure 1. Periodic reports: Technical information workflow

Financial information

The periodic financial report must be completed by each beneficiary (and by each AE[3]) involved in the action, for each reporting period (RP1, RP2 and RP3 as detailed above). The COOT will launch the process of collecting financial information at the **end of M18, M36** and **M54,** even if an earlier launch might occur if considered.

To support this process, a Financial Statement (FS) template has been created by the COOT for URSOILL partners and is available in Project SharePoint, under the folder named "General templates" > "Periodic Reporting templates."

Financial statement is aimed at collecting costs incurred in the period from all partners. Costs declared must i) meet the eligibility criteria set out in **Article 6 of the GA**, ii) correspond to the eligible cost categories defined in the **Data sheet (point 3) of the GA**, and iii) be set out in the **Annex 2** (estimated budget for the action) of the GA. Costs not foreseen might be reported and claimed, but they will have to be duly explained if we expect that the EC would accept them.

The timely compliance by all the Consortium with the internal procedures for the financial reporting is of primary importance. Without the timely delivery of the FS template and the submission of those costs into the FTP by a partner, the Coordinator might submit the Periodic

[3] Beneficiaries will be responsible for submitting the financial statements of their **affiliated entities** (if any).

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Report without the costs from such partner. This will imply that no costs would be reported by the partner for that period, and therefore, it would not benefit from the corresponding further payment from the EC.

The **workflow** that shall be followed for the submission of the financial report is explained next:

1. **The COOT will share an FS template for each RP with the Consortium partners to gather inputs.**
2. **All beneficiaries will complete the FS template and send it to the COOT within the requested internal timeline (normally 30 days before the date to submit the periodic report through the FTP).**
3. **The COOT will review if the FS template is correctly filled in and if there are costs not foreseen in Annex 2 or deviations incurred. In that case, the COOT will request the required justification from the beneficiary.**
4. **Once the final version of the FS template is agreed upon, each beneficiary will fill in the FS on the FTP[4] and inform the COOT once done at least 7 days before the deadline to submit the periodic report.**
5. **The COOT will review and confirm that the FS introduced is aligned with the final version of the FS template.**
6. **The individual FS of each beneficiary will then be signed electronically by the corresponding Project Financial Signatories (PFSIGN) appointed by each organisation (see further instructions in the Annex 2), at least 3 days before the deadline to submit the periodic report.**

The financial information workflow is represented below:

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[4] All persons with the following roles within one organisation have access to complete the Financial Statement on the F&T portal: Participant Contacts: PaCo; Coordinator Contact: CoCo

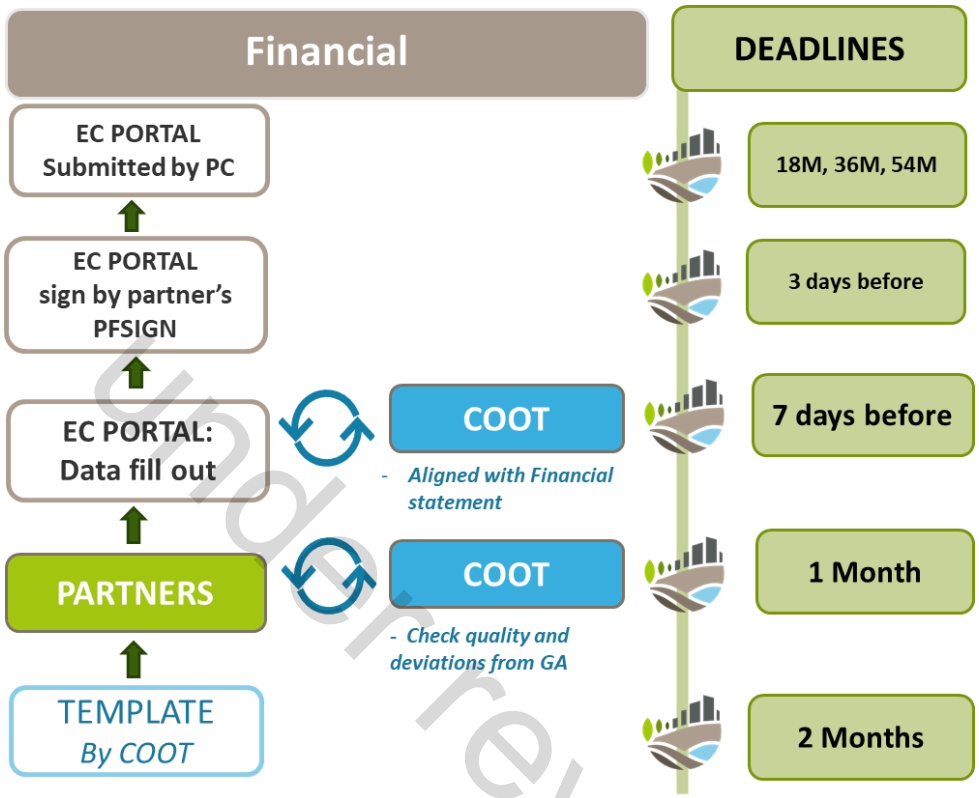

Figure 2. Periodic report: Financial information workflow

3.2. Continuous reporting

The beneficiaries must continuously report on the progress of the action (e.g. deliverables, milestones, risks, etc.) in the FTP through the Continuous Reporting module and in accordance with the timing and conditions it sets out (as agreed with the granting authority). The COOT will be responsible for completing the continuous reporting via the FTP.

This module enables the electronic submission of Deliverables and Periodic Reporting information (part A), which may be entered at any time during the project's duration, such as:

- Project summary
- Researchers involved in the project
- Submit deliverables
- Report progress in achieving milestones
- Follow up critical risks
- Publications
- Dissemination and Communication activities
- Intellectual Property Rights (IPR)

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- Financial Support to Third Parties (FSTP)
- Impact and Impact continuation

3.2.1. Deliverables

The list of **59 deliverables** of the URSOILL project is detailed in pages 5-8 of the Annex 1 - Description of the action (part A) of the GA. Additionally, this list, including the entities responsible for the revision of each deliverable, is available in the project SharePoint (folder "Deliverables Track" – **Deliverables track.xlsx**).

All deliverables must be submitted electronically to the Commission through the Continuous Reporting module in the FTP within the deadlines defined. The Project Coordinator will be the person responsible for uploading and submitting the final version of the deliverable in FTP.

In case of delay, the WP leader will promptly (ideally, two weeks before the deadline) inform to the Coordinator. Together with the lead partner responsible for the deliverable, they will assess the issue, determine appropriate corrective actions and agree on a revised submission date as soon as possible. If such an event occurs, the Coordinator will promptly notify the EC Project Officer, providing relevant details and a proposed resolution plan to ensure transparency and minimise potential disruption to the project's timeline. A specific template for the preparation of deliverables has been provided by the Dissemination and Communication WP leader, Greenovate (G!E), and is available on the SharePoint: "General Templates" folder. Deliverable of type DEC (websites, patent fillings, prototype), DATA (data sets, microdata, etc.), and OTHER should be complemented with a written document using deliverable template.

Under review

DELIVERABLES SUBMISSION PROCEDURE

1. **Notification: The lead beneficiary of a deliverable must notify the designated reviewers and the Work Package (WP) leader at least 60 days before the submission deadline, informing them of the upcoming deliverable review process.**
2. **First Submission: The lead beneficiary must submit the initial version of the deliverable to the reviewers and the WP leader no later than 21 days before the official submission date to the European Commission.**
3. **Initial Review & Feedback: Reviewers will provide feedback and comments within 5 working days. The lead beneficiary must address and implement the suggested revisions within 2 working days.**
4. **Second Submission: The lead beneficiary will send the revised deliverable to the reviewers at least 9 working days before the official submission deadline for final review.**
5. **Final Approval & Submission Preparation: The lead beneficiary must incorporate the final revisions and submit the completed deliverable to the Project Coordinator and WP leader at least 4 working days before the deadline.**
6. **Final Quality Check & Upload: The Coordination Team (COOT) will perform a final quality check and upload the deliverable to the Funding & Tenders Portal (F&T Portal) at least 2 working days before the official deadline.**

If any partner anticipates a delay of the deliverable, they must notify the COOT with two weeks prior to the delivery date. The coordinator will notify the PO one week in advance.

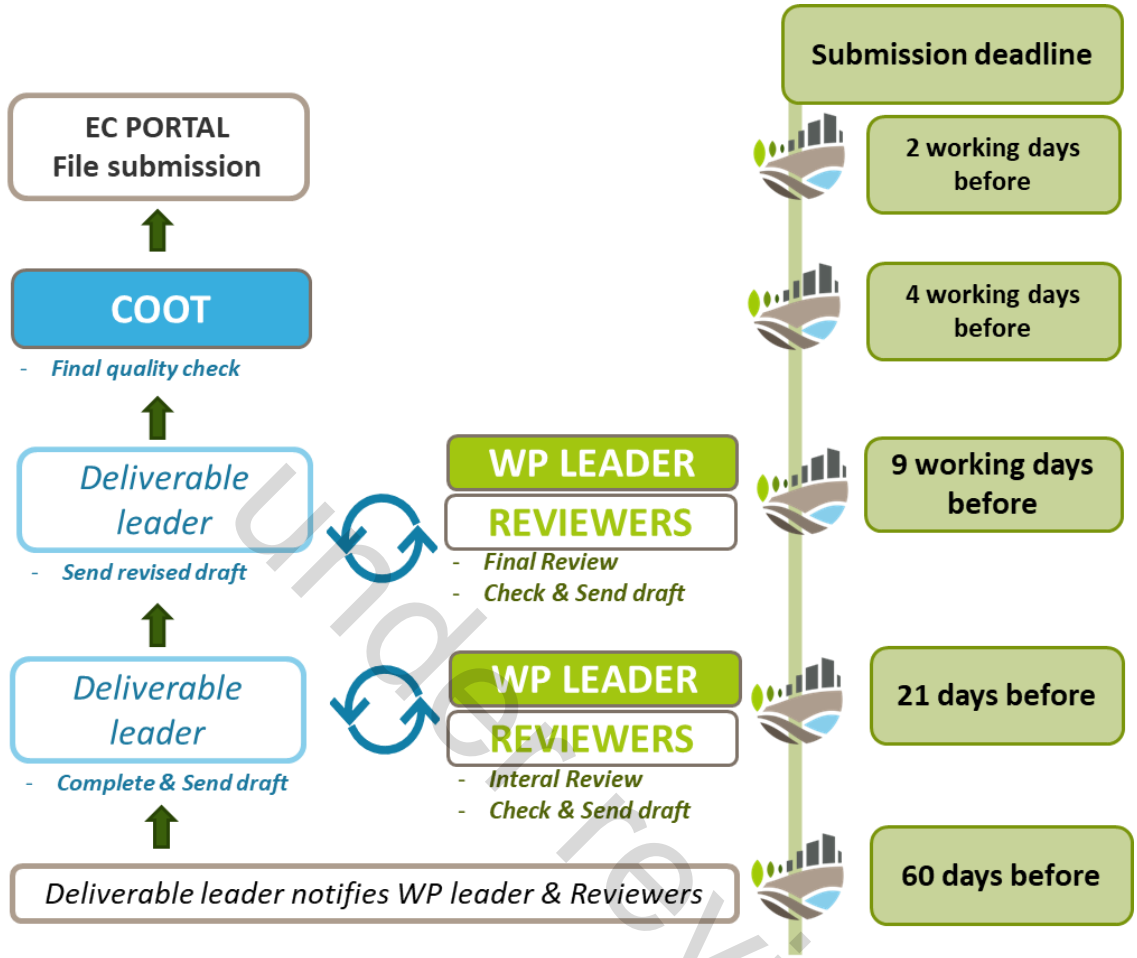

Figure 3. Deliverables review process

Under review

Numbering and format of deliverables

This section proposes a scheme for numbering the deliverables:

a) Deliverables under development: Deliverables will have the following notation: **DX.Y- Name of the deliverable_vN.P_revPARTNER**

- **D** stands for the word deliverable.
- **X.Y** is a number representing the Work Package that the deliverable is linked to (X) and the deliverable (Y) within the Work Package it is linked to (as per the GA or latest Amendment)
- The **title of the deliverable** must follow the one included in the GA or latest Amendment.
- _**v** stands for the word version.
    - **N** is the major revision (starting at 0).
    - **P** minor version reflects the progress during the Deliverable preparation phase (e.g. between telcos).

- _**revPARTNER** will be included indicating which partner revision or contribution it is, on top of the version being revised.

For the integration of the partner inputs, the word track changes mode will always be used.

b) Final deliverable: a revision numbering shall be included within the final document (**DX.Y-Name of the deliverable_vN)**.

Deliverable files shared among the consortium shall be in Microsoft Office formats: doc, docx, xls, xlsx, ppt, pptx. Official documents to the EC shall be in PDF format.

3.3. Internal reporting

The interim reporting is an internal procedure of the consortium to ensure the correct progress of the project tasks. In addition to the information recorded in the minutes of the PTC meetings about the progress status of all WP and LL, the URSOILL consortium will detail all the activities carried out in a concise six-monthly progress report. This internal reporting will consist of:

- Internal technical reporting: progress of the tasks will be reported, indicating terms of percentage of completion and estimated time to completion, deviations from agreed time scales and corrective actions, etc. With this information, WP leaders will summarise the progress of each WP and will send it to the Project Coordinator to update planning charts and manpower records.
- Internal financial reporting: the financial statement is aimed at collecting from all partners costs incurred in the period and the explanation of the use of the resources required by the Commission in the periodic report. Costs will be detailed at the WP level. The coordinator will review that costs declared are set out in Annex 2 (estimated budget for the action). Costs not foreseen might be reported and claimed but they will have to be duly explained. Significant deviations against the financial plan will be reviewed and also reported to the Project Officer to clarify if an amendment process is required (see section 7).

Templates for the internal technical and financial reporting (financial template already mentioned in the section Periodic reporting) will be shared with the consortium through the SharePoint repository ("General Templates" folder).

Under review

4. Document management

4.1. Repository

A SharePoint repository has been set up for URSOILL to effectively handle the documentation of the project. This tool is aimed at working on collaborative documents and sharing final documents of common interest within the Consortium. ZABALA is in charge of granting access permissions to whoever needs them. If one person needs access to the system, he/she should send an e-mail to the COOT (see details of the Zabala's personnel in the Excel "**00_URSOILL contacts**").

The URSOILL repository will be updated according to the needs of the project, creating new folders or subfolders in accordance with the needs. The objective is to have a full repository of working documents, final documents, legal documents, templates, and any ready-to-use documentation generated by the project members.

Each WP Leader is responsible for the contents of each WP folder. The main recommendation is creating collaborative documents within each folder to foster teamwork.

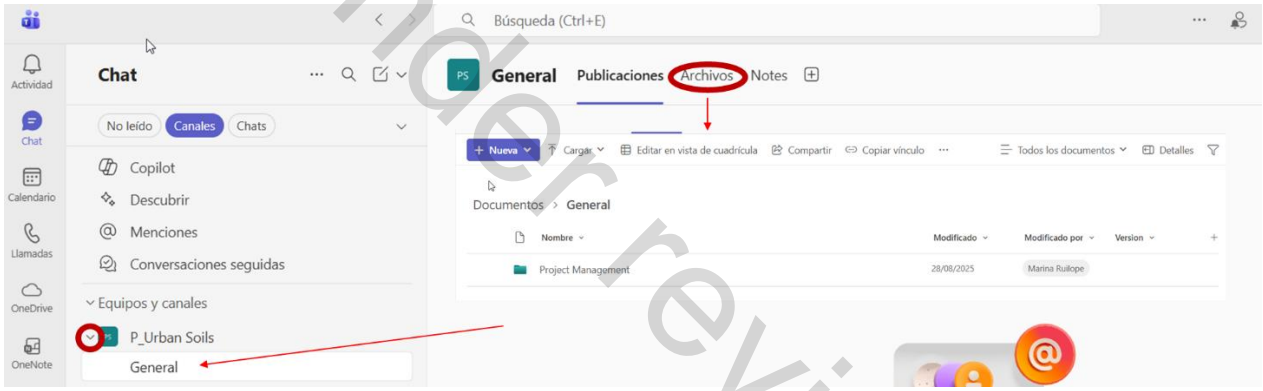

Figure 4. Structure of the URSOILL' SharePoint repository

Under review

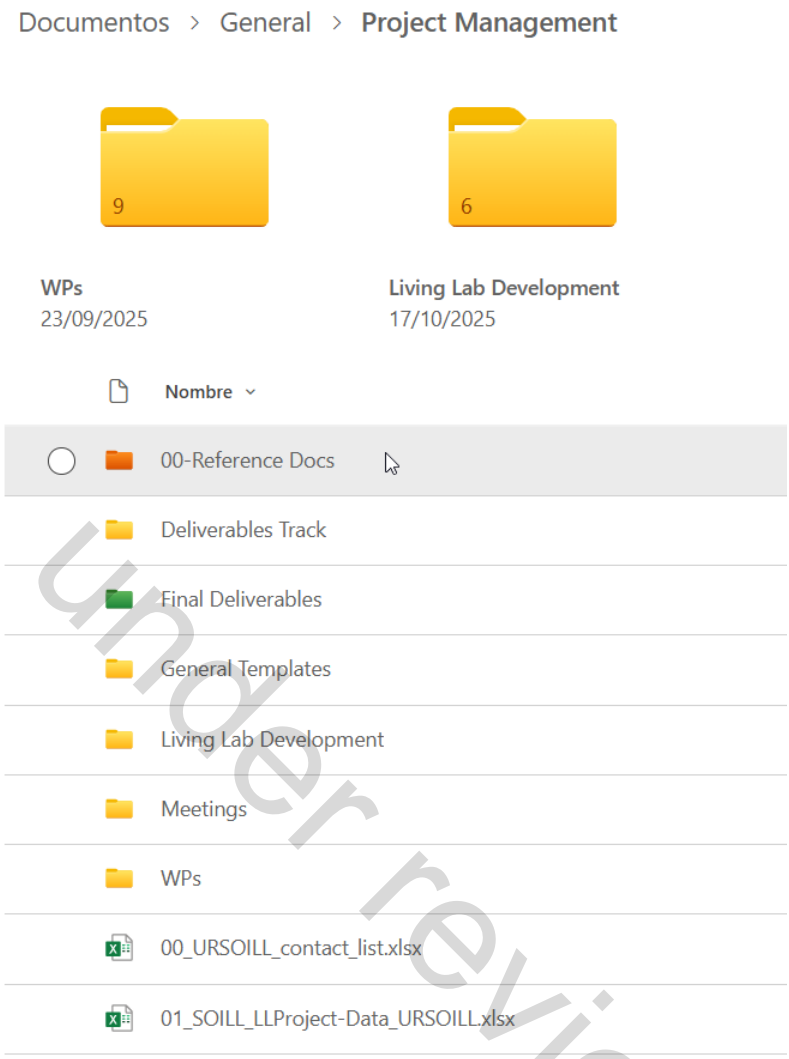

Figure 5. Documentation structure of the URSOILL' SharePoint repository

4.2. Language

According to the Grant Agreement, any report and deliverable shall be written in **English**.

Minutes of project meetings, project deliverables, and progress or periodic reports must be prepared in **English**.

4.3. Project templates

It is compulsory to use the templates available for all the documentation generated within URSOILL project. The project templates will be prepared by G!E (technical documents) and ZABALA (financial documents). All the reporting templates developed by G!E comply with the communication, dissemination, and visibility requirements defined in Article 17 of the GA (European flag, funding statement).

The project templates, available on SharePoint in the "General Templates" folder are currently under preparation

under review

These templates will be updated according to the evolving needs of the project. Users are there for advised to download the most recent version from the SharePoint. In addition, additional templates may be developed in accordance with the needs of the project partners.

4.4. Record-keeping obligations

As stated in the GA Article 20.1, **the beneficiaries must, for five years after the final payment, keep records and other supporting documents** to prove the proper implementation of the project in line with the accepted standards in the respective field (if any). This obligation ensures that the EC may, during the project or afterwards, verify the proper implementation of the action and assess compliance with the obligations in the GA, including the evaluation of costs, contributions, deliverables and reports (article 25.1 GA).

The beneficiaries must, for the same period, retain the following documentation as evidence supporting the amounts declared:

- **for actual costs (e.g., A1.-A.3 Personnel costs, B. Subcontracting, C. Other goods, works and services…)**: adequate records and supporting documents to prove the costs declared (such as contracts, subcontracts, invoices, and accounting records); in addition, the beneficiaries' usual accounting and internal control procedures must enable direct reconciliation between the amounts declared, the amounts recorded in their accounts, and the amounts stated in the supporting documents.
- **for the following simplified costs and contributions**: the beneficiaries do not need to keep specific records on the actual costs incurred, but must keep:
- unit costs and contributions (e.g. A.4 SME owners or natural person costs): adequate records and supporting documents to prove the number of units declared;
- financing not linked to costs (if any): adequate records and supporting documents to prove the achievement of the results or the fulfillment of the conditions as described in Annex 1 of the GA.
- **for unit, flat-rate, and lump sum costs and contributions according to usual cost accounting practices** (if any): the beneficiaries must keep any adequate records and supporting documents to prove that their cost accounting practices have been applied in a consistent manner, based on objective criteria, regardless of the source of funding, and that they comply with the eligibility conditions set out in Articles 6.1 and 6.2 of the GA.

Moreover, the following documentation is needed for specific budget categories:

- **personnel costs**: time worked for the beneficiary under the action must be supported by declarations signed monthly by the person and their supervisor, unless another reliable time-record system is in place; the granting authority may accept alternative evidence supporting the time worked for the action declared if it considers that it offers an adequate level of assurance.

Table 4 is a non-exhaustive list of supporting documents that might be requested in the context of checks, reviews, audits, or investigations.

under review

Table 4. Non-exhaustive list of supporting costs documents.

Supporting costs documentation	
Personnel Costs	• Employment contracts (or equivalent appointing act) • Payrolls and payments • Payments to social security contributions, taxes and other costs linked to remuneration • Time declarations
Subcontracting	• Invoices • Proof of payment • Internal rules for the choice of suppliers and evidence of the completion of these procedures (tenders, offers, framework contracts)
Purchase costs (C.1 Travel, C.2 Equipment, C3. Other goods, works and services)	• Invoices • Proof of payment • In case of depreciated equipment: internal rules of depreciation and copy of the depreciation accounts • Internal rules for the choice of suppliers and evidence of the completion of these procedures (tenders, offers, framework contracts)
Other documents	• Distribution of payments among partners • Salient extracts and reconciliations of costs claimed to underlying accounting records/general ledger • Copies of any auditor certification statements issued with a claim for cost reimbursement

under review

The records and supporting documents must be made available upon request (see Article 19) or in the context of checks, reviews, audits, or investigations (see Article 25).

In case of audit notification, the Coordinator will immediately inform the Consortium and establish an amendment.

The beneficiaries must keep the original documents. Digital and digitalised documents are considered originals if they are authorised by the applicable national law. The granting authority may accept non-original documents if they offer a comparable level of assurance.

5. Risk Management Plan (RMP)

The RMP includes the development of risk mitigation strategies and the application of contingency planning throughout the whole project to complete project and WP objectives on time and on budget

The URSOILL GA, in the DoA, identifies a list of critical risks that will be monitored during project implementation. Moreover, any other unforeseen internal or external risk that might affect the project's progress towards its objectives will be listed, and the corresponding contingency plans will be defined to carry out mitigation actions as early as possible. A template for the risk monitoring will be created and be available in the "General templates" folder of the project SharePoint.

Each Partner has the responsibility for immediate reporting to their respective WP Leader and to the Project Coordinator any situation that pose a risk to the project objectives or its successful completion. The PC is responsible for informing the GenA of the identified risks, monitoring the implementation of the countermeasures, and assessing the results/outcomes. The GenA has the authority to decide which countermeasures should be applied, by whom and when.

In case of problems or delays, the WP Leader will be consulted and may establish a taskforce to implement the necessary/actions. If no resolution is reached, the GenA will be consulted and will define mitigation plans to minimise the impact of the identified risk.

Under review

6. Quality – Agility – Resilience Plan (QARP)

Quality Assurance activities must be implemented throughout the entire project by the Consortium partners. This means that each partner shall review their own results before sharing them with others. The Quality – Agility – Resilience Plan (QARP) ensures that the results are delivered on time with high quality standard.

To have the best quality in the reports and deliverables to be prepared, the inputs to the reports and deliverables must be original (whenever possible), not extracted or copied from other sources of information. Nevertheless, information taken from other sources could be valid and valuable for some deliverables, but in these cases, it is necessary to explicitly refer to the source from which the information has been taken.

Each deliverable is associated with one or more tasks of the project and, therefore, has one or more contributors. Considering the complementarity of the information used and produced with each deliverable, WP leaders, in collaboration with task leaders, have created a matrix to summarise the inputs and outputs that should be considered for each deliverable (excel file available in the project SharePoint - Folder Deliverables Track and Matrix).

The main contributor is the lead beneficiary of a deliverable and is responsible for its preparation. Regarding the role of the lead beneficiary of a deliverable, it is important to consider that its responsibility goes beyond a simple coordination of the process and/or gathering inputs from other participants in the task. In this sense, the responsible Party for each deliverable is expected to be very active in contributing to the deliverable as well as in giving the necessary coherence for a good quality level.

All deliverables will be reviewed by at least one project partner with sufficient expertise to assess the consistency and completeness of the deliverable against the expected content and who has not been involved in its preparation. The reviewers are listed in the file **Deliverables track.xlsx** available in the project SharePoint (folder “Deliverables Track and Matrix”).

During the deliverable review process, the responsible partner will be reviewing the deliverables based on the following aspects:

- Completeness:
- Is it according to the original proposal?
- Does it contain all required chapters?
- Correctness:
- Does it contain correct information?
- Make language check.
- Make lay-out / template check.
- Consistency:
  - Are the chapters consistent with each other?
  - Is it consistent with other deliverables?
  - Is it according to the requirements of other WPs?

Under review

The document attached in Annex 3 serves as a guide for the deliverables review process. It must be completed and submitted to the lead of the deliverable when the quality is deemed insufficient; otherwise, its completion is optional.

under review

7. Project changes: Amendments

The basic principle of the project is to carry out all the tasks and activities within the scheduled timeframe, and with the resources foreseen in Annex I (DoA) of the Grant Agreement or its latest Amendment in force.

Any changes in the status of a beneficiary must be communicated to the Coordinator as soon as possible. The coordinator shall resolve queries and advise the beneficiaries. If required, the Project Coordinator will contact the EC Project Officer responsible and request clarifications and procedures to be followed. It is recommended that amendment requests should be initiated at least 2 months before intended implementation date.

Small changes during the implementation of the activities and/or the plan defined in the DoA should be viewed as normal in a research project. However, these minor deviations will be identified and explained in the description of the activities of the corresponding periodic report and corrective measures that were implemented (if any).

Significant project changes and deviations from the work planned must be dealt with in writing. The participant involved or WP Leader proposing the change should forward a written communication to the Coordinator, and potentially to the Consortium, explaining the reason behind the proposed changes and direct consequences in terms of budget, work programme, etc.

Generally, an amendment to the Grant Agreement (GA) is required whenever the GA or its annexes need to be modified. In some cases, the GA allows certain changes to be made without a formal amendment. I other situations, the need for an amendment must be assessed carefully. In general, GA may be amended, unless the change would entail significant modifications that could to the GA that would call into question the decision to award the grant or violate the principle of equal treatment of applicants.

Further information about amendments can be found in the project GA (article 39) and CA (sections 3.3, 4.3 and 6.3).

7.1. Changes which require an amendment

A non-exhaustive list of situations that require an amendment is detailed:

- Changes of the partnership (addition or termination of beneficiaries, affiliated entities, or associated partners, change of Coordinator...).
- Change of the Coordinator's bank account payments.
- Changes of the starting date or project duration.
- Changes of reporting periods.
- Changes to Annex 1 (significant change of the project tasks or of their division among the beneficiaries, changes in substance of project outputs...)
- Changes to Annex 2 (estimated budget):
    - A budget transfer between beneficiaries or between budget categories (or both) which is linked to a significant change in the action's work (i.e. Annex 1).
- A budget transfer to a form of costs that was not used by the beneficiary (i.e. with 0 EUR costs in Annex 2). Except for the transfer of amounts to budget categories which are

Under review

based on unit costs or unit contributions calculated using the usual cost accounting practices of the beneficiary (e.g., budget category D.2 Internal invoices).

- Changes concerning eligible in-kind contributions provided by third parties free of charge

- Addition of amounts for subcontracts not provided for in Annex 1 either requires an amendment or simplified approval.

For some cases and types of costs, the Grant Agreement provides simplified approval procedures. This means that beneficiaries may request ex-post approval from the granting authority to accept costs that were incurred but were not foreseen in the estimated budget. To obtain such a simplified approval, the beneficiaries must declare the costs in question in the next periodic report and flag and justify them. However, simplified approval remains entirely at the full discretion of the granting authority. Consequently, beneficiaries bear the risk that these costs may not be approved at the interim or final payment stage.

7.2. Changes which do not require an amendment

- For certain budget transfers. The Grant Agreements budget clause (Article 5.5) allows adjustments to, the budget breakdown, without requiring an amendment, by transfers (between participants and budget categories), as long as these changes do not result in any substantive or significant modifications to the description of the action in Annex 1.
- If the name or address of a beneficiary, linked third party, or Coordinator changes.
- If a universal takeover results in a change of beneficiary.
- If there is a change in the name of the bank or the address of the branch where the Coordinator has an account, or in the name of the account holder.

7.3. Amendment request procedure

If an amendment to the GA is necessary, the Project Coordinator will request the amendment process from the Project Officer on behalf of the Consortium. The Amendment can be prepared by the consortium participants together, but only the Coordinator can launch, sign, and submit them. Also, the EC can propose amendments, but for practical reasons participants are often asked to initiate the procedure.

The request must be unambiguous and complete and submitted in time (i.e. sufficiently in advance to allow proper analysis and preparation before they are due to take effect and, generally, before the end of the action). Requests introduced after the end of the action will be accepted only exceptionally, for very specific (duly substantiated) cases (e.g. change of bank account, change of Coordinator to make the payment of the balance). The Coordinator must ensure that it has the agreement of the consortium (in accordance with the internal decision-making processes, e.g. unanimity, simple or qualified majority, etc. set out in the consortium agreement).

The general steps involved in requesting an amendment, using the Participant Portal's Grant Management Service, are:

1. **The Project Coordinator launches the amendment request.**
2. **Amend the relevant data in the grant agreement**
3. **Give reasons for (justify) the amendment**

Under review

4. **Upload supporting documents**
5. **Make sure the necessary validations are completed (e.g. validation of a new legal entity or bank account)**
6. **Submit the amendment request.**

Further details and screenshots of this procedure can be found in the Online Manual of the FTP (link) under the module “Amendments”.

under review

8. Other management procedures

8.1. Dissemination & Communication strategy

The URSOILL dissemination and communication (D&C) strategy will be developed in WP7 "Communication, Dissemination Networking, and Capacity building" with the elaboration of the deliverable 7.1 "Communication, Dissemination & Exploitation Plan (CDEP)" and its updates (D7.2 – D7.4). These documents will describe the D&C objectives, target audiences, key messages, the action plan, and social media strategy, together with D7.5 E-learning Toolkit & Materials.

Additionally, the Project GA, in Article 17, establishes some beneficiaries' obligations regarding the promotion of the project results:

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

Figure 6. How to display the EU emblem and funding statement

- Any communication or dissemination activity must indicate the following **disclaimer** (translated into local languages where appropriate):

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

Specific communication, dissemination, and visibility rules are set out in Annex 5 of the project GA. Moreover, further information about how to communicate about EU-funded projects can be found in this link to the EC website.

8.2. Ethical compliance & Data management

Articles 13, 14 and 15 and Annex 5 of the project GA state beneficiaries' obligations in relation to Ethics and Data protection, respectively. Sections 4.5 and 10 of the URSOILL CA also include references to both issues. Additionally, the consortium will work on specific deliverables covering these topics:

- D8.2 Data Management Plan and its updates D8.3 - D8.4
- D8.5 URSOILL Ethical guidelines and Gender Action Plan

Under review

- D9.2 OEI - AI - POPD - EPQ – H and its update D9.3 - D9.4[5]

8.3. IPR & Exploitation of results

Exploitation, access rights, and ownership details are defined in Article 16 of the project GA as well as in sections 8 and 9 of the project CA. Moreover, the exploitation of the project results will be covered in the following deliverables:

- D7.1 Communication, Dissemination & Exploitation Plan (CDEP) and its updates D7.2 – D7.4.
- D7.5 E-learning Toolkit & Materials
- D5.7 Exploitation, business and commercialization strategies

under review

[5] OEI: Organizational Ethics and Integrity - AI: Artificial Intelligence - POPD: Protection of Personal Data - EPQ: Ethical Project Quality - H: Human

9. Annexes

9.1. Annex 1. Funding & Tenders Portal roles

9.1.1. Main roles and access rights

- The **Primary Coordinator Contact (PCoCo)** is the main contact between the consortium and the EU for a particular project/contract. By default, it is the person that creates the application in the portal. The PCoCo can nominate/revoke a Coordinator Contact (CoCo) for the project/contract (unlimited number possible), who will then have the same rights, except the right to revoke the PCoCo.
- **Participant Contacts (PaCo)** is a representative of an organisation in the consortium that is not the coordinating organisation.
- **Task Managers (TaMa)** can perform some restricted actions: creating, updating, and uploading documents about their organisation's participation and completing, modifying, or deleting project/contract information. An organisation can have an unlimited number of TaMas per project. They cannot nominate or revoke anybody, nor submit information to the Coordinator or EU.
- **Team Members (TeMe)** have limited access rights: search and read-only functions.
- The **Project Financial Signatory (PFSIGN)** The PFSIGN has the right to sign cost claims/invoices on behalf of the organisation. The LEAR (or Account Administrators) must first appoint FSIGNs; the Coordinator and each participant (PCoCo/CoCos/PaCos) can then assign PFSIGNs for a given project to act as legal signatory for the participant in the project. An organisation can have an unlimited number of PFSIGNs per project. They have the same rights as CoCos/PaCos for project/contract information. They cannot assign/revoke any roles.
- The **Project Legal Signatory (PLSIGN).** The PLSIGN has the right to sign the grant/contract (and amendments) for a specific project on behalf of the organisation. The LEAR (or Account Administrators) must first appoint LSIGNs; the Coordinator and each participant (PCoCo/CoCos/PaCos) can then assign PLSIGNs for a given project to act as legal signatory for the participant in the project. An organisation can have an unlimited number of PLSIGNs per project. They have the same rights as CoCos/PaCos for project/contract information. They cannot assign/revoke any roles.

Under review

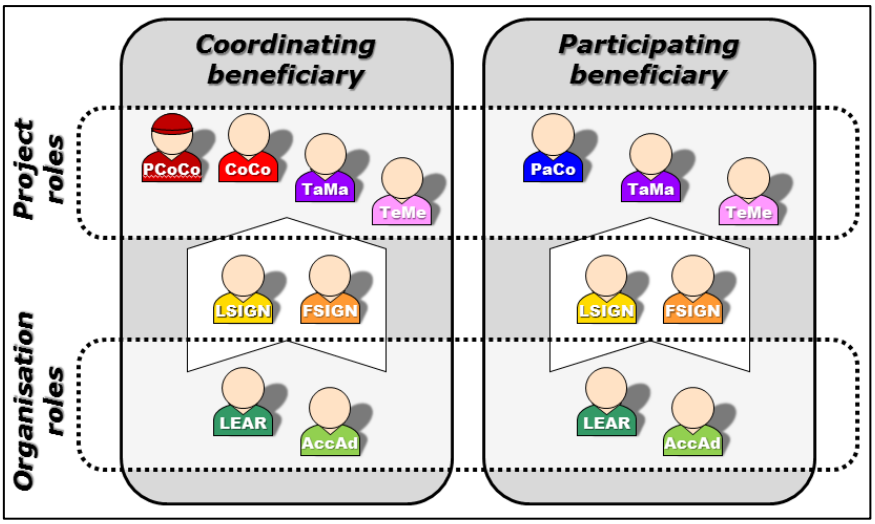

Figure 7. Funding & Tenders Portal roles

How to add or revoke roles in the Participant Portal?

Roles appointed by each beneficiary can be checked via the FTP under "My Projects" choosing the option "Manage Consortium".

Except for the Primary Coordinator Contact (PCoCo) and the LEAR, every role must be modified by the Participants.

Each user can be nominated or revoked by another user, as follows:

- The Primary Coordinator Contact can nominate/revoke Coordinator Contacts, Task Managers, and Team Members of the coordinating entity, Participant Contacts of other participating organisations, and assign LSIGNs and FSIGNs to a project.
- Coordinator Contacts can nominate/revoke other Coordinator Contacts, Task Managers, and Team Members of the coordinating entity and assign LSIGNs and FSIGNs to a project.
- Participant Contacts can nominate/revoke other Participant Contacts, Task Managers, and Team Members of their own entity and assign LSIGNs and FSIGNs to a project.
- The Legal Entity Appointed Representative (LEAR) can nominate Account Administrators, LSIGNs and FSIGNs for his/her own entity.
- Account Administrators can nominate LSIGNs and FSIGNs for his/her own entity.

Under review

9.2. Annex 2. Instructions for the electronic signature of financial statements

All beneficiaries shall appoint a Project Financial Signatory (PFSIGN) to submit a Financial Statement and the request for reimbursement to the Commission. To know the person(s) with this role in each beneficiary, in the FTP go to My Projects – URSOILL – Manage Consortium and the consult roles of each beneficiary.

The PFSIGN should log in the Participant Portal with their ECAS account.
Once logged in, go to "My project" tab and click "Manage project" button of URSOILL.
The PFSIGN will have the "Sign and Submit" option available in the beneficiary's Financial Statement to ensure that all information is correct before clicking "Sign and Submit".
The tool will request that the user enters again the PFSIGN´s ECAS password to sign electronically.
Once the PFSIGN introduces his/her password and clicks "SIGN" the process will be completed and the Financial Statement signed electronically.

Further details and screenshots of this procedure can be found in the Online Manual of the FTP (link) under the module "Reports & payment requests".

under review

9.3. Annex 3. Deliverable review template

9.3.1. Deliverable details

Deliverable number and Title

Work package

Work package Leader

Deliverable type

Dissemination level

9.3.2. Deliverable review

Please rate using the following scores: 1 = inadequate; 2 = poor; 3 = acceptable; 4 = good; 5 = excellent. If any of the items are rated 2 or below, then the deliverable cannot be accepted as it is and requires revision.

Under review

	Score
Are the aims and methods clearly explained?	
Is the methodology appropriate?	
Is the content presented in an appropriate and comprehensible manner (structure, presentation, and language)?	
Is the content correct, complete, and does it fulfill its objectives?	
Overall Quality Evaluation	

Please provide any specific comments on the report. If any of the above items is rated 2 or below, please state why.

9.3.3. Overall assessment

	Yes/No
The reviewer recommends that the deliverable can be submitted as it is, with no modifications required	
The reviewer recommends that the deliverable can be submitted, with minor modifications as detailed above	
The reviewer recommends that the deliverable cannot be submitted in this current version, but requires significant modifications as detailed above	

9.3.4. Final remarks

Any final remarks (where applicable)

under review