



Version: 1.0

D1.1

Project Quality Plan



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Quality Control

Role	Date	Who	Approved/Comment
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Disclaimer

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Executive Summary

The EDIHDO Project Quality Plan includes all relevant resources for an efficient collaboration between partners. It includes information on data management, project management processes and risk management. It also contains the project's communication guidelines and links to templates for deliverables. It is a living document that is being updated throughout the project.

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Definitions and acronyms

CA	Consortium Agreement
CSA	Coordination and Support Action
DIH	Digital Innovation Hub
DoA	Description of Action
EDIHDO	European Digital Innovation Hub Dortmund
EDIH	European Digital Innovation Hub
EC	European Commission
EU	European Union
GA	Grant Agreement
GDPR	General Data Protection Regulation
IA	Innovation Action
ICT	Internet communication tools
PC	Project Coordinator
PGA	Project General Assembly
RV	Review
SME	Small and medium sized enterprises
TTB	Technology Transfer Board
WP	Work Package
WPL	Work Package Leader

1 Introduction

The purpose of this Project Quality Plan is to enable efficient cooperation and exchange of information among partners. This includes relevant information regarding project management, data management and quality management practices throughout the project lifetime.

The Project Quality Plan refers to the existing consortium agreement (CA) and grant agreement (GA) agreements, which it will not replace or overrule, and is partly based on European Commission (EC) guidelines.

Nevertheless, this Project Quality Plan is a living document that will be updated as needed. Any changes affecting the CA or GA that have been agreed upon but are not yet approved are marked accordingly. The latest version of this document is always available on the EDIHDO project repository Teams in the [Deliverables folder](#).

2 Project Summary

2.1 Project Vision

Overarching goal of the Digital Hub Logistics Dortmund as EDIH (EDIHDO) is to promote the dissemination and acceptance of digital technologies and their successful application and implementation for the development of product, business model and process innovations in SMEs and medium-sized companies. EDIHDO focuses on the application domains of logistics, production, manufacturing, and global supply chain management. In the broad topic area of digitalisation, the technological focus areas artificial intelligence, high-performance computing, internet of things, cyber-physical systems, cyber security and data sovereignty are being pursued based on the needs of companies in the region, the potential in the application domain and the competences of the consortium partners. Since the successful implementation of digital technologies into innovative products and business models requires digital skills of the employees, EDIHDO also places a special focus on offers in the area of "advanced digital skills". In the area of cyber security, which also plays an important role in the acceptance and implementation of digital products and business models, the EDIHDO acts as an intermediary to the existing competence centres in the region (e.g. HGI Bochum).

The hub offers support formats in the service areas test before invest, skills & training, support to find investment and innovation ecosystem & networking and is additionally providing networking activities towards a federated community of European DIH forging international collaboration and enhancing the European technological and industrial base. These service areas are shown in the figure below:

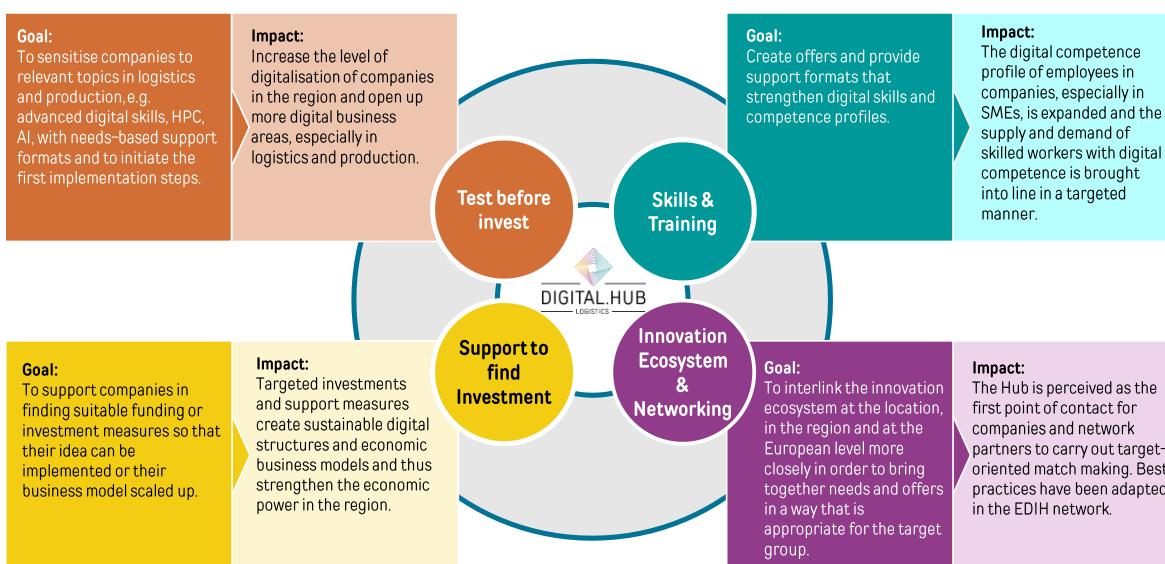


Figure 1: Goals and impact of EDIHDO

2.2 Project Objectives

EDIHDO addresses the dissemination and acceptance of digital technologies and their successful application for the development of products, business models and process

innovations. By this, EDIHDO will generate credible, transferable, and sustainable results and impacts and lead to an increase in digital maturity of each company. The company specific added values include, in particular, the development of expertise, simplified access to financing options and the reduction of false investments. From an overarching economic perspective, this enables the generation of innovation-based growth for each individual company as well as for the economy as a whole. This leads to new opportunities for job creation, for example for technology providers and companies. It can also stimulate investment in research and development. Through an increasing "digital maturity" of the involved companies and the networking activities of EDIHDO, in the medium to long term an ecosystem is created in which innovations and partnerships can mutually reinforce each other. In detail, the following impacts are expected with the implementation of EDIHDO:

Short-term (delivered during or by the end of the project duration):

- Creating a common understanding of the opportunities and needs for digitalisation as well as a corresponding strategy
- Increasing digital skills for European SMEs, especially in the fields of HPC, AI, DLT, IoT, Blockchain, 5G, data spaces and digital business opportunities
- Raising awareness among companies that digitalisation is a key enabler for a sustainable economic development (addressing resource efficiency and transparency along value chains)
- Convincing companies that bundling of competencies is necessary for a rapid transition into a digitalized economy

Mid-term (around 3 years after the project end)

- Continuation of the network, e.g. in the form of a community or strategic partnerships
- Expansion of best practices and blueprints for other SMEs to follow (e.g. for digital collaboration via interoperable data spaces as well as for data security and privacy)
- Creation of jobs and stimulation of investments in the context of digitalization and sustainable development
- Increase of digital maturity and innovation leadership for SMEs in the EDIHDO region

Long-term (5-10 years after the project end)

- Shaping the EDIHDO region as a digitalisation driver
- Strengthening the perception of Europe as a digitalisation driver
- Market creation by increasing the attractiveness of Europe as a location for research, development and application in the field of digital and sustainable technologies

2.3 Workplan Summary

To achieve its vision and objectives, the workplan for EDIHDO has been designed for a period of 36 months and is structured in five work packages (WPs) that group activities and skills required to implement the project whilst ensuring effective coordination.

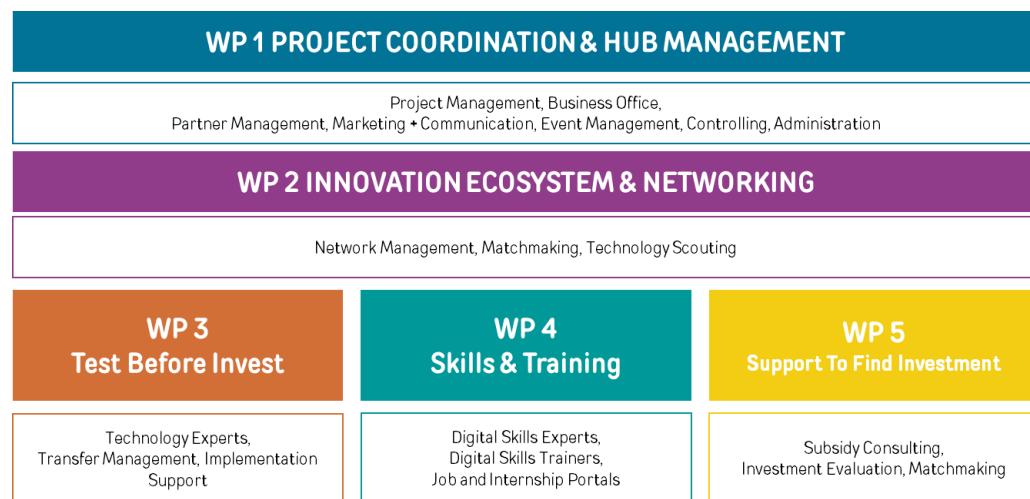


Figure 2: EDIHDO Overview work packages

Table 1 shows the overall workplan including the timeline. Since some start dates and durations may change throughout the project due to amendments, it is advised to always refer to the online version of the chart that can be found on Teams.

ACTIVITY	YEAR 1				YEAR 2				YEAR 3			
	Q 1	Q 2	Q 3	Q 4	Q 1	Q 2	Q 3	Q 4	Q 1	Q 2	Q 3	Q 4
Task 1.1 – Project management and coordination												
Task 1.2 – Local EDIH head office												
Task 1.3 – Communication and dissemination activities												
Task 1.4 – Event management												
Task 1.5 – Controlling and continuous evaluation												
Task 2.1 – Preparation and ongoing alignment of inn. ecosystem and netw. activities												
Task 2.2 – SME and innovation ecosystem match making												
Task 2.3 – Technology Scouting												
Task 2.4 – EDIH Network + Digital Transformation Accelerator engagement												
Task 2.5 – Local stakeholder engagement												
Task 2.6 – Ongoing development of local technology centres												

Task 3.1 – Preparation and ongoing alignment of test before invest activities													
Task 3.2 - Information and raise awareness on key technologies													
Task 3.3 – Digital Maturity Assessment													
Task 3.4 – Supporting Digital Strategy Development for SMEs													
Task 3.5 – Access to demonstration facilities and testbeds													
Task 4.1 – Preparation and ongoing alignment of skills + training activities													
Task 4.2 – Workshops + Trainings on Digital Transformation Skills													
Task 4.3 – Workshops + Trainings on Digital Technology and Product refinement													
Task 4.4 – Train-the-Trainer Advanced Digital Skills													
Task 4.5 – Recruiting and talent attracting													
Task 5.1 – Preparation and ongoing alignment of skills + training activities													
Task 5.2 – Defining and qualifying investment strategy													
Task 5.3 – Funding opportunities													
Task 5.4 – Match Making Startups-VCs-SMEs													

Table 1: Workplan and task timeline

2.4 Project contacts

Table 2 contains the contact details of the project coordinator and the contact persons from the consortium for the main activities.

Function	Name	Contact	Partner
Project Coordinator	Maria Beck	maria.beck@digitalhub.eu	DHM
Project Finance	Thorsten Hülsmann	thorsten.huelsmann@digitalhub.eu	DHM
WP1 Lead	Maria Beck	maria.beck@digitalhub.eu	DHM
WP2 Lead	Maria Beck	maria.beck@digitalhub.eu	DHM
WP3 Lead	Christoph Besenfelder	christoph.besenfelder@tu-dortmund.de	TU DO
WP4 Lead	Christoph Besenfelder	christoph.besenfelder@tu-dortmund.de	TU DO
WP5 Lead	Kai Bünseler	Kai.buenseler@tz-net.de	TZNET

Table 2: EDIHDO Key contact details

3 Internal Communication Guidelines

3.1 Collaborative Tool (MS Teams)

Microsoft Teams has been set up as the collaborative tool for the whole consortium. Teams is used as:

- File repository for the project to maintain current versions of files, such as Deliverables and working documents of EDIHDO that are relevant for more than one partner.
- Collaborative editing tool, where files can be edited online from the web browser or on the app, without the need of downloading them.
- Discussion and information sharing platform of the consortium for internal project matters, as well as organizing online meetings. Conversations, that might be relevant for more than one person are encouraged to be held openly on Teams rather than e-mail.

The EDIHDO Teams can be accessed through this [URL](#). The consortium has been granted access to the repository and has the right to modify it. Access to Teams is controlled by the coordinator. For changes the project coordinator must be contacted.

The structure of filing can and will be updated throughout the project to adapt to changing needs to use the tool most efficiently.

3.2 Document Management

Teams enables simultaneous collaboration on files without having to merge different versions. For all documents that are being shared within the projects these guidelines apply:

All documents should avoid having blank spaces or “.” In their names. Instead underscores “_” should be used to allow for browsing in different applications.

Deliverables will be named: EDIHDO_<dnumber>_<docname>_<sec>_v<ver>.pdf

For example, the Project Quality Plan will be named EDIHDO_D1.1_Project Quality Plan_P_v1.0.pdf

Other documents, such as minutes or working files are named: EDIHDO_<docname>_<sec>_v<ver>.pdf

Text documents use the format *.docx/doc (Word or equivalent) according to the templates provided in: [WP 1 - Projektmanagement > Deliverables + Templates](#).

Presentations use the format *.pptx/ppt format (or equivalent) according to the templates provided in: [Allgemein](#).

To disable other people from editing files, they can be checked in and out manually. For that click on the three dots next to the file name and select “check out” or “check in” respectively.

For collaborative documents track changes should be enabled.

For sharing files, click on the three dots next to the file name and select “copy link”. This link can now be shared within Teams or via e-mail.

Each channel has its own file repository. Changes may be made as needed. Exceptions apply to the Project Management channel. Only the coordinator may change the file system there.

Deliverables will be generated in PDF format by the project coordinator after the peer review when submitting the document to the EC.

All the documents to be forwarded outside the consortium, including the presentations and the final deliverables, will use ONLY PDF format, will be properly secured and will authorize only printing, no edition, no copy and no annotation.

The deliverables, and interim reports must follow the format and styles indicated in the template available in the corresponding section of the file repository. They are available at [WP 1 – Projektmanagement > Deliverables + Templates > Deliverables.](#)

These templates can evolve according to the project needs.

3.3 E-Mails

For issues relevant to the whole consortium one mailing list exists. The general mailing list is only to be used for topics that are of interest to all, which mostly means being used as a “broadcast” by the project coordinator.

These guidelines apply to all e-mail communication within EDIHDO:

- If you are looking for input and a discussion with more than one person, create a new thread in Teams instead of creating a new e-mail thread.
- Always use the project acronym at the beginning of the subject lines (i.e., “[EDIHDO]”)
- Reply/ CC only to people concerned by the e-mail (do not use “reply to all”)
- Inform DHM about necessary additions and changes to the general mailing list
- Use clear subject lines in e-mails.
- If needed create new “thread” (do not just reply to any random project email) BUT use same thread for related topic (possibly change subject line)
- Link to documents on the project repository instead of using file attachments.

3.4 Communication Material

According to the GA any dissemination activities of EDIHDO unless the Commission requests or agrees otherwise or unless it is impossible must:

- display the EU emblem with appropriate prominence and
- include the following text:

“This project has received funding from the European Commission under grant agreement No 101083415”.

Additionally, the logo and brand guidelines must be followed. They can be found in the [file repository](#).

3.5 Meetings

The project will hold specific meetings for different purposes, both by meeting at a common location and via conference call. The calendar of the meetings will be created with the start of the project and the actual partners that will host the meetings will be selected too. The assignment will be based on the critical Milestones, Activities and expected outcomes of the project that are related with the meeting period. For meetings on project-level the PC will properly prepare the agenda of each meeting at least 14 days before the event. The PC will provide minutes and Action Points within 14 days of the end of the meeting. In addition to these project-level meetings, each WP Leader may organize WP meetings (teleconferences or face-to-face) to facilitate the correct progress of the work (discussion about technical and organizational items) at least on a monthly basis. Co-location with other meetings or events that the partners plan to attend will always be considered as the best option to optimize resources. NOTICE: given the current COVID-19 situation and unclear developments for the future, all planned physical events and meetings might need to be held in a remote modality. The consortium has consolidated expertise and the proper tools in place to face this situation.

All follow-up actions are in the responsibility of the meeting chair. WP Leaders and Task leaders are responsible for organizing teleconferences as they are needed with relevant partners. Minutes of meetings will be provided within ten days after the meeting and are to be stored in the file repository.

In order to ensure continuous coordination between the partners involved, a Jour Fixe via Teams has been established as a coordination format. This jour fixe takes place weekly. A continuous agenda was set up to collect the topics.

In addition, there will be consortium meetings during the course of the project to discuss strategic issues.

4 Quality Assurance

To guarantee an optimal allocation of resources to the project activities, tasks, responsibilities, and partner involvement have been well defined. The coordination and follow-up procedures for monitoring progress and responding to changes follows a cyclical monitoring process. The progress of tasks and work packages will be monitored on a bi-weekly basis to allow an early identification and estimation of upcoming risks. These risks will be evaluated, and measures will be implemented accordingly. Any deviations or corrective actions to the agreed upon workplan will be presented to and will be agreed by the EC project officer.

4.1 Risk Management

An initial risk assessment has been performed during the proposal preparation and the results will serve as a baseline for the project's later risk management. Managing risks is an ongoing task that will be performed by Task Leaders, Work Package Leaders, and the project coordinator throughout the whole project duration. This will include assessing risks and measures as well as defining and implementing risk recovery measures. The identified risks can be found in the table below, which also includes an assessment of their likeliness and impact on the project, as well as measures to mitigate these risks. The list will be updated regularly by the project coordinator with the information received from WPLs and will be included in the progress reports.

Risk No	Description	WP	Risk Mitigation Measures
1	Complexity in management (Low)	1	Most of the partners have collaborated in the past under other projects bringing excellent results. Besides, DHM, has long lasting and intensive experience in coordinating successfully completed or in progress projects with large consortiums, both on a national and European level. Regular calls to monitor the execution of WPs and tasks will be organized. In addition, monitoring procedures will be in place to detect any under-achieving partner in an early stage and the project will encourage open and honest reporting of problems, so that solutions can be found as soon as possible.
2	Loss of critical competencies or of key people in the project (Low)	1	The PC will receive an early indication on the possible withdrawal of key people and if not replaceable by the partner, the PC will look for comparable competencies amongst other partners (budget would be shifted from the “defaulting” partner to the partner that provide the competencies). In case that competencies are not available with-in the project the PC will initiate an amendment to the GA to add a new partner to the consortium and the shift of budget from the defaulting partner.

3	Partner is underperforming (Low)	1	Only reliable partners are chosen. Quarterly reporting and continuous monitoring by the PC will avoid undiscovered underperforming. In any such case the mitigation plan includes reactivating the partners and in the worst case remove / replace as necessary. In case non-performances detected, the coordinator will either get the non-performing partner to focus or to replace people. Failing to comply implies that its budget will be shifted from the “defaulting” partner to another partner that possesses the competencies to perform the needed activities.
4	Limited reactions to the EDIHDO offers (Medium)	2,3,4,5	All partners have an extended SME/midcap network and longlasting experiences with successful SME offers in the related activity fields, especially due to the up and running Mittelstand-Digital Zentrum Ruhr-OWL and the dehub-Initiative. However, as the KPI is ambitious, it might be that there are not enough applications to join the programme. In that case, extra communication efforts will be worked out by the hub member(s). In addition, the consortium partners will be dedicated to leveraging their connections and influence to engage their networks. Also the pre-existing network of SMEs, mid-caps and intermediaries of the consortium members (such as the EEN) can and will be used to further reach out to potential clients and to spread the possibility across various marketing channels.
5	Low level of interests in participation in the Digital Maturity Assessment (High)	3	The benefits of participation are clearly communicated to customers and participation in the Digital Maturity Assessment is closely monitored by EDIH resources. This way, open questions can be answered, and irrelevant parts of the questionnaire can be neglected.
6	Low participation in training activities (Medium)	4	The level of training content and facilities offered will range from a low to an advanced level and thus be attractive to different target groups. In that case, extra communication efforts will be worked out by the hub member(s). In addition, the consortium partners will be dedicated to leveraging their connections and influence to engage their networks. Also the pre-existing network of SMEs, mid-caps and intermediaries of the consortium members (such as the EEN) can and will be used to further reach out to potential clients and to spread the possibility across various marketing channels.

7	Continued restrictions on travel and public gatherings due to COVID-19 (Medium)	2,3,4,5	EDIHDO activities are designed to leverage technology to provide value to stakeholders. Therefore, some EDIHDO activities and services may alternatively be conducted online if limitations due to COVID-19 persist. In case of an ongoing restrictions due to COVID 19 measures there might be a slight but logical shift of budget necessary from "travel budget" to increasing "technical capability for interactive online meetings".
8	Few SMEs/midcaps are interested in cross-border collaborations (High)	2,3,4,5	The pre-existing network of SMEs, midcaps and intermediaries of the consortium members (such as the EEN) can and will be used to further reach out to potential clients and to spread the possibility across various marketing channels. In addition, the consortium partners will be dedicated to leveraging their connections and influence to engage their networks. At the very end EDIHDO will deliver and implement actions which have an added value for local and regional SME. If the continuous monitoring of the project will prove that this type of cooperation does not add value, this is not a risk but rather a realization and valuable insight for the whole EDIH programme.
9	The methodology does not apply to all needs of SMEs/midcaps (low)	2,3,4,5	The methodology will be continuously evaluated and updated based on the needs of the target groups. If specific needs from SMEs/midcaps are not covered this will be included through iteration within the project.
10	Low level of interests from SMEs to participate in EDIH services (medium)	2,3,4,5	The pre-existing network of SMEs, midcaps and intermediaries of the consortium members (such as the EEN) can and will be used to further reach out to potential clients and to spread the possibility across various marketing channels. In addition, the consortium partners will be dedicated to leveraging their connections and influence to engage their networks.

Table 3: EDIHDO identified risks and mitigation measures

4.2 Deliverables

Deliverables are contractual obligations to the project. The list of deliverables, responsible partner and deadline are listed in the description of action (DoA). The template for deliverable is available on [Teams](#).

The process for deliverables is visualized in Figure 5. Each deliverable will be reviewed by internal reviewers (IR) appointed by the work package leader (WPL), confirmed by the project coordinator. The quality review by other partners is organized by the WPL. In addition, all partners can comment the deliverable. Normally internal reviewers are partners

as much as possible external to the WP or at least not initially involved in the writing process. The project coordinator will make a pre-final check of the deliverable for consistency and readability before uploading it. Where necessary, the project coordinator (PC) could request further work of the partners on a deliverable, to ensure that it complies with the project's contractual requirements. The EDIHDO project coordinator submits the deliverable to the EC participant portal by the deadline and shall inform the general assembly.

Working or draft versions will be named as v0.1, 0.2 etc. The first public version is v1.0. If any deliverable has a scheduled update they will be named as v2.0, v.3.0, etc. in accordance with the DoA.



Figure 3: Deliverable process

Deliverables						
WP	Deliverable Related No	Del. No	Deliverable Name	Lead Beneficiary	Dissemination Level	Due Date
WP1	D1.1	D1	Project Quality Plan	DHM	PU	30 Apr 2023
WP1	D1.2	D2	Dissemination and exploitation plan	DHM	PU	30 Apr 2023
WP1	D1.3	D3	Progress review report	DHM	PU	30 Apr 2024
WP1	D1.4	D4	Final project report	DHM	PU	31 Oct 2025
WP2	D2.1	D5	Initial Service Portfolio report WP 2	TZNet	PU	30 Apr 2023
WP2	D2.2	D6	Report on cross-border collaborations	DHM	PU	31 Oct 2024
WP3	D3.1	D7	Initial Service Portfolio Report WP3	TUDO	PU	30 Apr 2023
WP3	D3.2	D8	Digital Maturity Report	TUDO	PU	31 Oct 2024
WP4	D4.1	D9	Initial Service Portfolio Report WP4	TUDO	PU	30 Apr 2023
WP4	D4.2	D10	Skills and Training evaluation 1	TUDO	SEN	31 Jan 2024
WP4	D4.3	D11	Advanced digital Skills report	TUDO	PU	31 Oct 2024
WP4	D4.4	D12	Skills and Training evaluation 2	TUDO	SEN	31 Jul 2025
WP5	D5.1	D13	Initial Service Design Portfolio WP5	TZNet	PU	30 Apr 2023

Table 4: EDIHDO List of deliverables

5 Project Management

5.1 Project Governance

The Project General Assembly (PGA) is the highest decision body of the project. Chaired by the Project Coordinator (PC), it is formed by one representative of each partner. The PGA will decide on matters related to the overall Work Plan. It will discuss - and make decisions and will indicate and guide actions that are deemed necessary for securing the uninterrupted progress of the project. The overall duties of the PGA include: following up the project; releasing project results; managing potential problems and taking all contractual decisions. In the case that a major modification of the overall project will be required, the decision for such a change will be made after consultation with all the participating members. The PGA will meet twice per year. Additional meetings will be arranged, if necessary, for urgent matters or if a majority of partners agree on it. Internal consensus among the project partners on managerial issues is vital to the project success. If a consortium member is not present or represented at a PGA meeting without prior excuse, that partner is bound to honour the decisions taken and actions placed on him/her in absence. Whenever possible, all the decisions will be adopted by general consensus. Normally the PGA will decide with a majority of 2/3 about the required modifications and changes due to events that arise during the course of the project.

Technology Transfer Board (TTB) will be established in M06 of the project. The TTB is composed of external experienced technology transfer experts, e.g. from best practice SMEs or multipliers; and acts as a steering committee for technology transfer. It is primarily responsible for a) ensuring that technology transfer is targeted to the activities of the EDIH service portfolio, b) sharing experiences and best practices during the implementation and evaluation of the program with other EDIHs both at regional level and in the European network of EDIHs, c) selecting transfer and piloting projects together with WP Leaders that serve as best practices for SMEs in the selected application fields. The TTB meets up to 2 times a year.

Project Coordinator (PC): will be responsible for the overall management, communication, and coordination of project. The PC will act as the interface between partners and the European Commission, monitor compliance of partners with their obligations, control the entire project implementation, control the project's resources and budget, handle the project financial aspects, control the schedule of activities and allocation of person-months, ensure the effectiveness of the project's internal communication, apply quality assurance, deal with risk assessment and mitigation plans, undertake quality control of contractual deliverables, ensure that all deliverables are available on time to the Commission and/or project partners, liaise with and report to the European Commission on all matters concerning the project. The PC is provided by DHM.

Work package Leader / Task Leader: The WP Leaders are responsible for implementing the WPs' plan and for the scientific and technical integrity of the relevant contractual deliverables. Each WP leader coordinates, monitors and assesses WP progress and milestones to ensure that performance, budget, and timelines are met; proposes the agenda in the respective meetings; approves Deliverables produced in the WP; Reports to the PGA any possible deviations identified due to scheduling, unsuitability or risks affecting the quality

of project results and/or objective. In cooperation with the PC, WP Leaders are responsible for integrating their results to succeeding Tasks/WPs. The Task Leader is responsible for coordination of work on task deliverables, has similar role to WP Leader, on a Task level.

5.2 Project Communication

Internal information flow: The vertical flow of information to/from the PC and the partners comprises mainly the administrative issues, such as: (i) Periodic progress reporting of administrative information from all partners to the PC, and the distribution of the consolidated reports back from the coordinator to all partners; (ii) Meetings of the PGA for the contractual and administrative execution and monitoring of the project; (iii) Administration of advance payments and cost claims. The flow of information between the WPs is generally more appropriate to a less formal and horizontal process. Information will be exchanged between partners in the same WP through regular e-mail contact and weekly jour fixe meetings.

External information flow: Periodic Progress Reports (PPRs) will be collated and submitted in the reporting periods as these will be set by the EC, prior to each project review, by the PC. These reports detail the work performed by the partners, the achievements, collaborations, resources spent/planned, and future plans and, together with the Financial Statements, will serve as the main Project Management documentation. Brief management reports will be written on a regular basis to keep the European Commission and the partners informed of the key achievements and any issues. This planning ensures proper project monitoring and allows the European Commission to have a comprehensive knowledge of the project progress. For the organization and preparation of these reports, already-available Web tools will be used. Deliverables will also be supplied to the PC.

5.3 WP Leader Responsibilities

The WP Leaders are responsible for implementing the WPs' plan and for the scientific and technical integrity of the relevant contractual deliverables.

WPLs are responsible for the following tasks:

- Coordinating, monitoring, and assessing WP progress and milestones to ensure that performance, budget, and timelines are met.
- Proposing the agenda in the respective meetings.
- Approving deliverables produced in the WP, and reports to the PGA any possible deviations identified due to scheduling, unsuitability or risks affecting the quality of project results and/or objective.
- In cooperation with the PC and TTB, WP Leaders are responsible for integrating their results to succeeding Tasks/WPs.

The Task Leader is responsible for coordinating the work on task deliverables. The role is the same as the one of the WPL on the task level.

5.4 Planned consortium meetings

The following consortium meetings are planned:

Meeting	Time	Location	Comments
Kick-off	M1	Dortmund	Consortium meeting
PGA	M2	Dortmund	Consortium meeting and workshop
PGA	M6	Dortmund	Consortium meeting and workshop
PGA	M12	Unna	Consortium meeting and workshop
PGA	M18	Dortmund	Consortium meeting and workshop
RV (Review)	M18	Dortmund	Review meeting
PGA	M24	Dortmund	Consortium meeting and workshop
PGA	M30	Dortmund	Consortium meeting and workshop
PGA	M36	Dortmund	Consortium meeting and workshop
RV (Final)	M36	Dortmund	After project closing

Table 5: Timeline consortium meetings

PGA meetings should be noticed 30 calendar days in advance. The agenda should be sent 14 days before the meeting. Agenda items shall be added at least 14 days before. Minutes will be provided by organizer within 10 days after meeting.

As the consortium consists of local project partners, weekly jour fixe meetings and working meetings and workshops can be organised without much travel effort and can partly also be implemented at short notice and according to demand.

5.5 Reporting

The project duration is from November 2022 to October 2025 (36 months). Its reporting periods (RP) are:

Reporting Period	From Month	To Month	Duration	Start Date	End Date	Reviews with EC
RP1	M1	M18	18	01/11/2022	30/04/2024	M18 (tbc)
RP2	M19	M36	18	01/05/2024	31/10/2025	M36 (tbc)

Table 6: Reporting periods

Periodic reports P1 and P2 must be submitted to EC within 60 calendar days. The financial reporting must be submitted electronically by each partner at EC's Participant Portal.

The Project Coordinator is the intermediary for communication between EC and each partner. The PC will provide detailed reporting instructions.

The periodic project reports will include a periodic technical report and a periodic financial report.

The **periodic technical report** includes an explanation of the work carried out by the beneficiaries and an overview of the progress towards the objectives of the action, including milestones and deliverables identified in the DoA. This report must include explanations justifying the differences between work expected to be carried out in accordance with the DoA and that actually has been carried out. The report must detail the exploitation and dissemination of the results and include an updated plan for the exploitation and dissemination of the results. The report must indicate the communication activities and provide a summary for publication of the project's results for the Commission.

The **periodic financial report** contains an individual financial statement (see Annex 4 of the GA) from each beneficiary and from each linked third party, for the reporting period concerned. The individual financial statement must detail

- The eligible costs (actual costs, unit costs and flat-rate costs) for each budget category.
- An explanation of the use of resources and the information on subcontracting and in-kind contributions provided by third parties from each beneficiary and from each linked third party, for the reporting period concerned.
- It will also contain a periodic summary financial statement, created automatically by the electronic exchange system, consolidating the individual financial statements for the reporting period concerned and including except for the last reporting period — the request for interim payment.

Additionally, the coordinator will ask partners every six months to provide detailed information on the progress of activities and the resources used to monitor the continuous progress of the project.

6 Data Management Plan

This Project Data Management Plan (DMP) describes the data which will be collected within the EDIHDO project and the related data management methods. It includes a description of the related methodologies and standards to be followed.

As not all tools to be used and procedures to be applied are known at the beginning of the project a new version of the DMP shall be uploaded whenever significant changes arise in the project. Examples are:

- new data collected,
- changes in consortium policies,
- new, exploitable results.

DHM acts as the Data Manager in the EDIHDO project. DHM has set up a record of processing activities, pursuant to Article 30 of the GDPR. DHM has appointed a Data Protection Officer, Mr. Christian Linder.

DHM adheres to the approved code of conduct / certification under the German GDPR and has put in place the technical and organisational measures to safeguard the rights and freedoms of human participants according to GDPR.

The DMP will be a dynamic tool that is updated regularly, and in any case, by the mid-term and final project reviews of EDIHDO.

6.1 Data Summary

Table 7 describes the as-is summary of datasets within EDIHDO.

ID	WP	Resource type	Title	Origin and method	File location	Type of access	Description
1-1	1	Database	Technology Transfer Board	EDIHDO Partners letters of support and network contact details	Teams (EU)	Restricted	Selection of high level stakeholders
1-2	1	Database	Website	Website visits	Wordpress	Restricted	Data to deliver the website content correctly, optimize the website, ensure long-time viability, and law enforcement.
1-3	1	Database	Event Newsletter Mailing List	Newsletter Registration with double Opt-in	CRM Tool	Restricted	Newsletter registration

Table 7: EDIHDO summary of current datasets

6.2 Fair data

Making data findable, including provisions for metadata

Quality control measures will be taken to maintain the accuracy of data during the project. Metadata elements will be used describing the data to aid data discovery and potential re-use.

Making data openly accessible

The EDIHDO consortium does currently not foresees open datasets (for view only and registration required). This will only be relevant in regard to deliverables of the project, such as the ecosystem overview map. This information will be publicly available but does not contain any foreseen datasets.

The coordinator in collaboration with project partners will take all the appropriate measures to make relevant data openly available and usable for third parties for study, teaching and research purposes.

If, after project closure, permission to re-use the data is required, all requests for further use of data will be considered carefully and whenever possible approved by the coordinator or the person mandated with the task. Permission for data use will be granted providing there are no IPR or confidentiality issues involved. Permission will be provided by contacting the project coordinator. Contact information and appropriate procedure will be provided in connection with other metadata.

Making data interoperable

Variables and value names will be constructed following general data processing conventions. List of value names and used vocabulary will be provided as per need in the Metadata schema, continuously updated.

Increase data re-use (through clarifying licenses)

Ownership of datasets will belong to project consortium after the project completion. Creative Commons licence CC-BY-SA or CC-BY will be used for any opened datasets unless there are compelling reasons to select more restricted type of CC-licence. Creative commons licences will by default also include a disclaimer of liability for the re-use of open data.

No definite period or time limit is planned for access or re-use of the data. Justification for possible case-specific embargo for published data will be decided by project consortium. Embargo will be sought primarily in connection with any potential patent application based on project results.

Allocation of resources

Costs related to research data management, to make research data quality-controlled, FAIR-compatible, and as open as possible is foreseen in the project budget.

During the project consortium partners will be responsible for managing and curating datasets at their possession. DHM as project coordinator and task leader acts as Project

Data Manager. At the project ending, the General Assembly will mandate the Coordinator to take care of long-term preservation and sharing of datasets.

The project coordinator DHM has appointed a Data Protection Officer DPO. Contact information:

Herr Christian Linder
Bechtle GmbH
Piepersberg 42, 42653 Solingen, Germany
Phone: +49 212 3390 283
E-Mail: christian.linder@bechtle.com

6.3 Data security

EDIHDO will make full use of a comprehensive publicly available website to ensure a constant, high quality information flow for disseminating the project results, including public deliverables. LinkedIn and Twitter will also be used to disseminate information about the project.

A private (password-protected) project management and collaboration tool such as MS Teams, Podio or JIVE will be made available as a repository for all relevant working and “final” documents, distribution lists, electronic bulletin boards and meeting information, in order to facilitate the dissemination of information between partners. It will enable generation of highlights, presentation of management data (manpower, finances, deliverables, partner contacts, GANTT charts, etc.), organization of meetings, a document library, discussion forum, etc. Another part of the site will be used to give the EC and reviewers access to project documents prior to each project review.

During the project datasets will be available only to those project partners or project consortium members, who have been accredited by and their data usage has been approved by the Coordinator or authorized project consortium member. Project partners will be responsible for curating, preserving, disseminating and deleting in appropriate manner the datasets in their possession. Retention time for curated datasets will be the same as for other project results at the project consortium partners.

Data collected or acquired within the project will be stored in a secure IT environment behind a firewall. Access will need authentication.

6.4 Data ethics

Protection of Personal Data

EDIHDO complies with:

the REGULATION (EU) 2016/679 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 27 April 2016 on the protection of natural persons with regard to the processing of personal data and on the free movement of such data, and until valid, the repealing Directive 95/46/EC (General Data Protection Regulation),

Directive 2002/58/EC on privacy and electronic communications,

the Charter of Fundamental Rights of the EU (2000/c 364/01).

As stated in the Grant Agreement, personal data collected, if any, will not include sensitive data like health, sexual lifestyle, ethnicity, political opinion, religious or philosophical conviction. It will be limited to an extent strictly necessary and proportionate for the objectives of the project. (Reference: Regulation (EU) 2016/679, particularly Article 5).

Environment Protection and Safety

The consortium will follow appropriate health and safety procedures, if necessary, conforming to relevant local/national guidelines/legislation that will be followed for the staff involved in the project. The project will provide the documents that will be required by law and regulations in the respective country if necessary.

Gender Issues

As per the Grant Agreement, fair treatment based on gender is ensured in:

Project Management: EDIHDO will take all measures to promote equal gender opportunities in the implementation of the action and will aim for a gender balance at all levels of personnel assigned to the action, including at supervisory and managerial level. Concretely, EDIHDO will try to get a gender balance of 50% of the underrepresented gender in decision-making structures and 50% for advisory Groups.

At the same time, EDIHDO, adheres to the initiative “No woman, no panel” launched by the Open Society Foundation and promoted by Commissioner Mariya Gabriel, encouraging all panels of debate in public events to count with the participation of women and ending up with the so-called “Manels”.

Moreover, EDIHDO has three women leading work packages out of six.

6.5 Data sharing with DTA

EDIHDO will cooperate with the DTA and other EDIHs. For this purpose, EDIHDO may share collected data that contribute to joint objectives as per agreement and the Data Management Plan.

The use and appropriateness of the data for the claimed purposes shall be agreed between EDIHDO and the related CSA prior to data sharing. The use of the data for any purpose other than the agreed one (e.g., with no clear or commonly accepted contribution to the CSA objectives) will be strictly forbidden. EDIHDO will arrange specific agreements (that may be signed contracts) with the CSA, which will define the data that will be shared and the purpose of use.

All users of the EDIHDO website and tools will be asked for their consent on sharing their data with the CSAs upon registration, if needed. In addition, they will be able to opt-in or opt-out on the data sharing scheme at any time.

As for the time of drafting this report, EDIHDO foresees that aggregated statistics about the types, industries, and countries may contribute to the CSAs objectives.

This information reflects the current vision of sharing data with the above-mentioned projects. Specifics on the data and sharing mechanisms shall be defined after joint decisions by all the projects supported by these CSAs



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