VIPRISCAR

Validation of an industrial process to manufacture isosorbide bis(methyl carbonate) at pilot level

Deliverable D1.2

Quality Assurance Plan (I)

Lead beneficiary	TECNALIA
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Disclaimer

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EXECUTIVE SUMMARY

The purpose of the VIPRISCAR Quality Assurance Plan is to give an overview of the most relevant managerial aspects of the project, setting the rules and responsibilities of the partners, aimed at ensuring an excellent quality and progress of the work. The Quality Assurance Plan should serve as a Project Handbook for the Consortium and will be maintained and updated during project execution (at month 12, 24 and 36). The current version of the document is the second update (D1.2).

First, the project basis describes the project participants and contacts, the project duration, budget and BBI-JU contribution, as well as the main contractual documents (i.e. the Grant Agreement and the Consortium Agreement).

Second, the project management structure of the project summarises the governance structure, the role and responsibilities of the various actors/partners and how the relationship with the BBI-JU, as funding authority, will be managed.

Third, the quality assurance procedures include internal and external progress monitoring mechanisms to track actual performance compared to the Project Management Plan. Additionally, the VIPRISCAR project will implement a project risk management process that will monitor and control the project risks in a continuous manner. A project risk register has been created at the beginning of the project and will be updated during the project execution. Quality control will be only applied to paper documents produced within the project, and particularly to the project deliverables. It will involve a peer review process. VIPRISCAR will implement TECNALIA's Standard Innovation Management Process ISAMPE, with particular focus on the activities within WP8.

Finally, information management is also considered. Communication is fundamental to keep all the partners informed about the project status. The main communications mechanisms are E-mails, Collaborative Workspace, Project meetings, Technical documents, Dissemination of project results, and Reports. Templates for the most relevant project documentation have been prepared by means of Microsoft Office 2010.

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ABBREVIATIONS AND ACRONYMS

AB	Advisory Board
BBI-GA	Grant Agreement with the Biobased Industries Joint Undertaking
BBI-JU	Biobased Industries Joint Undertaking
CA	Consortium Agreement
CC	Conference Call
EDM	Exploitation & Dissemination Manager
EDT	Exploitation & Dissemination Team
EM	Extraordinary Meeting
FM	Final Meeting
FR	Final Report
GA	General Assembly
IM	Innovation Manager
IMP	Innovation Manager Plan
IPR	Intellectual Property Rights
OM	Ordinary Meeting
PC	Project Coordinator
PR	Periodic Report
PSC	Project Steering Committee
PO	Project Officer
QAP	Quality Assurance Plan
TL	Task Leader
ToC	Table of Content
WBS	Work Breakdown Structure
WP	Work Package
WPL	Work Package Leader

1. INTRODUCTION

WP1 in VIPRISCAR Project is devoted to ensure the overall management of the work undertaken in the project. Therefore, this WP sets up the management guidelines with the aim to achieve the following goals:

- The overall strategic and operational management and steering of the project, ensuring the accuracy, quality and timeliness of deliverables.
- Ensure the seamless integration of the activities (i.e. manage the time and result dependencies) by reviewing and assessing the progress of VIPRISCAR activities towards the defined goals and objectives.
- Co-ordinate and ensure the coherence of all the developments between Work Packages.
- Conduct the financial and administrative management of the project.
- Establish the communication flow and methods for reporting, monitoring, quality assurance and innovation management.
- Periodic monitoring of risks and implementation of contingency plans if needed.
- Manage liaison with the BBI-JU and the production of periodic reports.
- Manage the knowledge and Intellectual Property Rights, including any legal agreements such as the Consortium Agreement and other agreements required for the use, access and exploitation of results and background.
- Manage the public face of the project and encourage networking with other related projects and biobased products platforms and initiatives
- Promote gender equality.

The purpose of the VIPRISCAR Quality Assurance Plan is to give an overview of the most relevant managerial aspects of the project, setting the rules and responsibilities of the partners, aimed at ensuring an excellent quality and progress of the work.

The Quality Assurance Plan should serve as a Project Handbook for the Consortium and will be maintained and updated during project execution (at month 12, 24 and 36). Each time that the document would be updated all the partners will be duly informed about the changes in the project and procedures with respect to the previous version.

The present document completes and extends the VIPRISCAR Consortium Agreement (CA), but in case of discrepancy, CA text will prevail.

2. PROJECT BASIS

2.1 PROJECT PARTICIPANTS AND CONTACTS

Official contact information for each of the Project Participants can be found in both the Grant Agreement (BBI-GA) and the Consortium Agreement (CA) of the project.

For convenience purposes, this list is also included below:

TABLE 2.1: PARTNERSHIP TABLE

No.	Project participant name	Short name	Country
1	FUNDACION TECNALIA RESEARCH & INNOVATION	TECNALIA	Spain
2	JOWAT SE	JOWAT	Germany
3	CIKAUTXO S COOP	CIKAUTXO	Spain
4	B4PLASTICS	B4P	Belgium
5	AEP POLYMERS SRL	AEP	Italy
6	VERTECH GROUP	VERTECH	France
7	EXERGY LTD	EXERGY	United Kingdom
8	FUNDACIÓN GAIKER	GAIKER	Spain
9	ACONDICIONAMIENTO TARRASENSE ASSOCIACION	LEITAT	Spain

Besides, Attachment 5 of the CA identifies the official recipient of notices for each partner.

Finally, the contact list of all people to be involved in project execution is included in **Annex I (Contact list) of this document**. New contacts or changes/corrections to this list of contacts should be sent to soraya.prieto@tecnalia.com as contact information responsible.

2.2 PROJECT DURATION, BUDGET AND BBI-JU CONTRIBUTION

The effective **start of the project is 01.06.2018**, and **the project ends 36 months later, on 31.05.2021**.

The project has an overall budget of **EUR 3,527,608.75**, the estimated eligible costs of the project are **EUR 3,257,325.50** of which **EUR 2,814,876** shall be financed by the BBI-JU.

The budget for the project, as well as its distribution between the Members of the Consortium is detailed in the BBI-GA, Annex 2.

Personnel costs for SME owners (Antonio Barona from VERTECH group and Stefaan De Wildeman from B4Plstics) not receiving a salary must be declared on the basis of the amount per unit set out in Annex 2a of BBI-GA.

The BBI-JU contribution of each of the partners is a maximum contribution conditioned to the acceptance by the BBI-JU of expenses up to the budget of the partner. This means that if a partner spends less than what it is shown in its approved budget (or the BBI-JU does not accept all its costs), it will receive only the proportional part of the BBI-JU contribution.

The budget breakdown indicated in Annex 2 is an estimate. It may be adjusted by transfers of amounts between beneficiaries or between budget categories (or both). This does not require an amendment if the action is implemented as described in Annex 1. However, the beneficiaries may not add costs relating to subcontracts not provided for in Annex 1, unless such additional subcontracts are approved by an amendment.

Partners are strongly recommended to inform the Coordinator of any budget shift to determine whether it requires the explicit approval of the BBI-JU.

2.3 CONTRACTUAL DOCUMENTS

The reference documents for the project Consortium members, which define the tasks, rights and obligations of the partners are the BBI-GA (including its annexes) and the CA (including its addendums if any).

2.3.1 GRANT AGREEMENT (BBI-GA)

The Grant Agreement with the BBI-JU has the **identification No. 790440**.

The BBI-GA is the contractual document signed by all project partners, which defines the rights and obligations of the Consortium regarding the BBI-JU, and comprises the following annexes:

- Annex 1 - Description of the action.
- Annex 2 - Estimated budget for the action.
  - 2a – Additional information on the estimated budget.
- Annex 3 - Accession Forms.
- Annex 4 - Model for the financial statements.
- Annex 5 - Model for the certificate on the financial statements.
- Annex 6 - Model for the certificate on the methodology.

An amendment to the BBI-GA is a legal act modifying the commitments stated in the BBI-GA and which may create new rights or impose new obligations on the parties. It allows the Consortium to modify the BBI-GA during its lifetime. Amendments can only be done through the SyGMa application in the Participant Portal, need to be done through the Coordinator, and are subject to official acceptance by the BBI-JU. Any substantial modification to the content of Annex 1 needs the official acceptance of the BBI-JU through an amendment process. Partners are strongly recommended to check with the Coordinator any issue that might be subject to an amendment.

2.3.2 CONSORTIUM AGREEMENT (CA)

The Consortium Agreement (CA) is the internal contract of the Consortium partners, which has been signed and is accepted by all partners (VIPRISCAR consortium agreement version 5, 2018/04/12). It defines the Consortium internal rules for project management as well as the Consortium organisation and decision taking mechanisms. In case of discrepancy, the CA is overruled by the BBI-GA.

3. PROJECT MANAGEMENT STRUCTURE

This section describes the project management structure of the project, that is: the governance structure, the role and responsibilities of the various actors/partners and how the relationship with the BBI-JU, as funding authority, will be managed. Currently, Mr. Polyvios Hadjiyiangou is the designated BBI-JU contact for the VIPRISCAR project.

The next graph shows the main roles and gives and overall picture of the governance structure for the VIPRISCAR project.

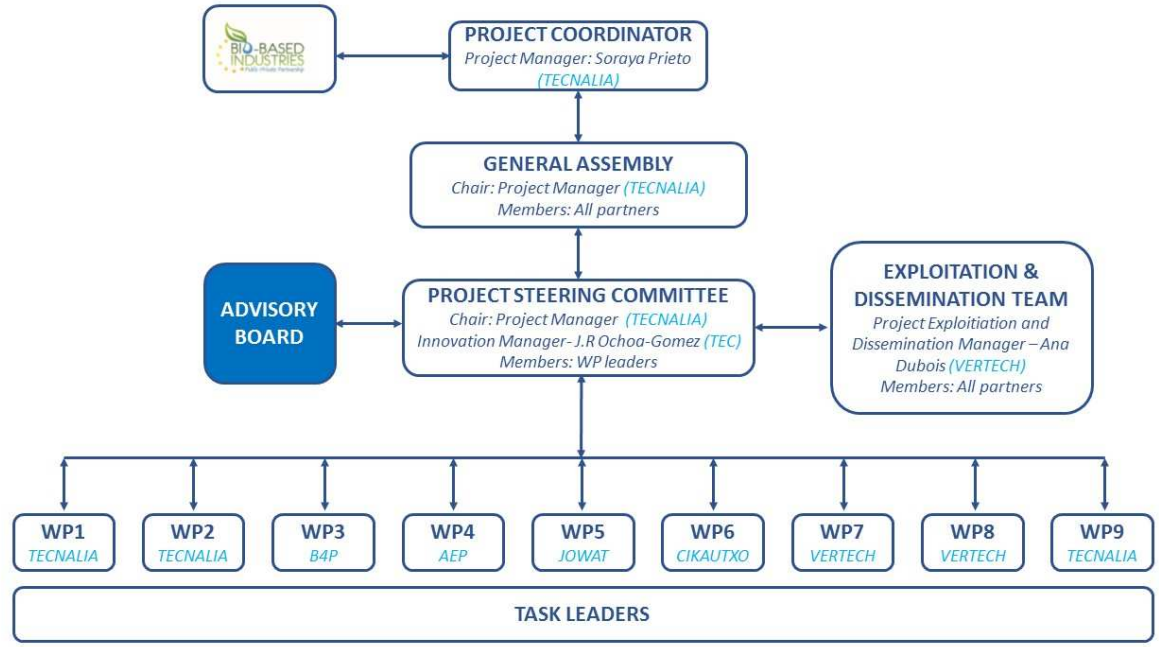

FIGURE 3.1: PROJECT MANAGEMENT STRUCTURE

3.1 PROJECT COORDINATOR (PC)

The main responsibility of the PC is to ensure the timely and effective overall progress of the project according to the Contract. The Project Manager (PM) is appointed by the PC. The nominated PM is **Dr. Soraya Prieto** and she will be supported by the Programmes Office of TECNALIA.

The PM chairs the General Assembly, and has primarily the following roles:

- Ensure the timely and effective overall progress of the project.
- Interface between the consortium and the BBI-JU, dealing also with contractual, administrative and financial matters in addition to overall responsibility for project progress reporting. Circulation of respective information and communications. The PM will communicate with the BBI-JU on behalf of the consortium.

- Organisation of Project Steering Committee meetings, project reviews and co-ordination of dissemination and exploitation events (in association with the Project exploitation and dissemination Manager and Innovation Manager).
- Manage all the aspects connected with payment of financial contributions.

The PM will summarise the overall VIPRISCAR project status and planning. The schedule and the effort tables will be updated with the data obtained from the Work Package Leaders. If the PM fails in its coordination tasks, the GA may propose to the Funding Authority to change the PM.

The PM is not entitled to act or to make legally binding declarations on behalf of any other partner or of the Consortium, unless explicitly stated otherwise in the BBI-GA or the CA.

3.2 GENERAL ASSEMBLY (GA)

The role of the GA is to make decisions concerning any important top-level management issues arising. This function will include the PM and senior project representatives from each partner, together with the Innovation Manager (IM). The main issues to be covered by GA are:

- Definition of a comprehensive and attainable strategy for completion of project objectives, with appropriate levels of control.
- Overall coordination of the macro issues which affect the running of the project, including management of financial, technical, planning, control and exploitation matters.
- Specific progress control of resources and utilisation with respect to the work plan.
- Preparation and authorisation of any subsequent contractual agreements.
- Definition of appropriate corrective actions to be taken in the case of progress problems or conflicts.
- Project Risks will be reviewed at each GA meeting.
- Appointment of relevant key figures, such as Project Exploitation Manager.
- Top level decision making in matters related to the Contract.

TABLE 3.1: GA REPRESENTATIVES

No.	Partner	Representative
1	TECNALIA	Soraya Prieto
2	JOWAT	Hartmut Henneken
3	CIKAUTXO	Iker Principe
4	B4P	Stefaan De Wildeman
5	AEP	Elena Benedetti
6	VERTECH	Ana Dubois
7	EXERGY	Yaying Chen
8	GAIKER	Jose María Cuevas
9	LEITAT	Hector Linuesa

Each GA member is duly authorised to deliberate, negotiate and decide on project content, finances and intellectual property rights, as well as on the evolution of the Consortium. The GA will not deliberate and decide validly unless three-quarters (3/4) of its Members are present or represented (quorum). The PM chairs all meetings of the GA, unless decided otherwise in a meeting of the GA. Meetings of the GA will be convened every 6 months.

3.3 PROJECT STEERING COMMITEE (PSC)

The Project Steering Committee (PSC) consists of the Coordinator and the Work Package Leaders (WPLs). The appointed PSC members are the following (Table 3.2):

TABLE 3.2: PSC MEMBERS

No.	Partner	WPL	Manager
1	TECNALIA	WP1	Soraya Prieto
		WP2	Jose Ramón Ochoa
		WP9	Ainhoa Egizabal
2	JOWAT	WP5	Daniela Klein
3	CIKAUTXO	WP6	Iker Principe
4	B4P	WP3	Stefaan De Wildeman
5	AEP	WP4	Elena Benedetti
6	VERTECH	WP7	Erasmo Cadena
		WP8	Ana Dubois

The executive decision-making of the project is under the responsibility of the PSC. Its role is to decide about the high-level management issues, including mainly technical, financial, exploitation, dissemination, innovation, planning and control matters, provided that these decisions do not entail major project and/or contractual issues managed by the GA.

It will be responsible for:

- Undertaking the strategic planning and direction of the project.
- Monitoring the project progress and the revision of its achievements through the milestones and risk assessment.
- The establishment of the risk assessment and contingency plan and its follow-up.
- The approval of the periodic technical and financial reports.
- The final report and the project deliverables before submission to the BBI-JU.
- The approval of networking activities with other related European projects and initiatives.
- The approval of the dissemination and communication plan and of the exploitation plan, and the monitoring of their deployment.

Therefore, the Steering Committee will act as a "core group" assuming the executive decision making and supporting the PC in relevant management aspects.

3.4 INNOVATION MANAGER (IM)

The IM will have an overall project overview, both technical and market related. The IM will be **Dr. José-Ramón Ochoa-Gómez** from TECNALIA. The IM main responsibilities include:

- To understand the market needs and opportunities.
- To be responsible for the overall strategic approach.
- Ensure the project's foundations, management innovation processes and structures are sound and working effectively.
- Continually monitor the market, IP and technology landscapes.
- Steer (adapt if necessary) the development plan to meet the project objectives and market needs – including market deployment.

The IM will assist to the Steering Committee meeting in order to assure the innovation management plan (IMP) is being followed: the generation of innovative ideas, verification of the state-of-the-art evolution, the TRL status of the technology, the demands of the market, the state of patentability, the potential of business, etc.

3.5 EXPLOITATION & DISSEMINATION TEAM (EDT)

The E&D Manager (EDM) coordinates all exploitation, dissemination, communication and training activities, and is responsible with the IM of IPR management. EDT is responsible for the exploitation plan and follow up on this plan, coordinating exploitation activities across

partners, as well as dissemination plan, communication, the project web sites, social media (LinkedIn, Facebook…), and other communication mechanisms. The EDM reports to the PM. The partner in charge of leading EDT is VERTECH, who has appointed as Exploitation and Dissemination Manager Ana Dubois, Market and Business Strategist of VERTECH.

TABLE 3.3: E&D TEAM REPRESENTATIVES

No.	Partner	Representative
1	TECNALIA	Soraya Prieto
2	JOWAT	Daniela Klein
3	CIKAUTXO	Gonzalo Martín
4	B4P	Stefaan De Wildeman
5	AEP	Elena Benedetti
6	VERTECH	Ana Dubois
7	EXERGY	Yaying Chen
8	GAIKER	Jose María Cuevas
9	LEITAT	Maxence Viallon

3.6 WORKPACKAGE LEADERS (WPL)

The Work Package Leaders (WPLs) are responsible for the performance of specific Work Packages (WP). Each WPL involved will appoint a Work Package Manager.

The appointed WP Managers are the following:

TABLE 3.4: WP LEADERS

WP	Partner	WP Manager
WP1	TECNALIA	Soraya Prieto
WP2	TECNALIA	Jose Ramón Ochoa
WP3	B4P	Stefaan De Wildeman
WP4	AEP	Elena Benedetti
WP5	JOWAT	Daniela Klein
WP6	CIKAUTXO	Iker Principe
WP7	VERTECH	Erasmo Cadena
WP8	VERTECH	Ana Dubois
WP9	TECNALIA	Ainhoa Egizabal

WPLs will be committed to:

- Ensure the accomplishment of the technical objectives of the WPs;
- Report and follow deliverables and milestones to the Coordinator;
- Assess the quality of the outputs from the WP, including their own deliverables;

- Facilitate and actively participate in the technical meetings required to track the work progress and discuss and report project detail;
- Archive all documents related to the led WP;
- Refer to the Coordinator in case of major issue that may affect the completion of the work;
- Report the WP progress at each GA meeting.

WP meetings will be convened when needed, either face-to-face or using audio/video conferencing tools.

3.7 TASK LEADERS (TL)

The Task Leaders (TLs) are responsible for the performance of specific Tasks. TLs will be committed to:

- Ensure the technical follow up of their specific task and the detailed coordination with the other tasks within the WP;
- Assure the timely and proper execution of their tasks and report to the WPL in case of any deviation or risk;
- Lead the preparation of the deliverables resulting from their Tasks and the coordination with other tasks for their participation in the deliverable preparation;
- Prepare and deliver the internal Task progress reports upon request to the WPL.

Task meetings will be convened when needed, either face-to-face or using audio/video conferencing tools.

A list of all task leaders in the different WPs is included in Annex I (Contact list) of this document.

3.8 ADVISORY BOARD (AB)

The Advisory Board (AB) will assist and facilitate the decisions made by the GA. Particularly, the advisory board set up for VIPRISCAR is formed by top level, senior experts of the Target Audience and Market, to receive advice during the project lifetime. They will be following the project development, providing information, advice and guidance to orient the project development towards the right scientific and market targets, and to provide a network of stakeholder contacts for further development after project ending.

The initial appointed AB members are the following:

TABLE 3.5: AB MEMBERS

No.	Entity	Representative
1	Rawlings Giles	Patrick Giles
2	Suschem	Anne-Chloé Devic
3	Sakuragi Consult	Rob Kirschbaum
4	Cromogenia Units S.A.	Antonio Torrelles

But, finally the AB group is composed only by Mr. Giles and Mr. Kirschbaum because Mrs. Devic has changed organization and unfortunately Mr. Torrelles has died (RIP).

The members of the AB have signed bilateral non-disclosure agreements with TECNALIA, which terms are not less stringent than those stipulated in the CA, in order to protect any exchange of confidential information.

The AB members will participate in GA meetings upon invitation, however, they have not any voting rights. Travel and subsistence costs for four members have been budgeted. The Coordinator will write the minutes of the AB meetings and prepare the implementation of the AB's suggestions.

4. QUALITY ASSURANCE PROCEDURES

4.1 PROGRESS MONITORING

4.1.1 INTERNAL MONITORING

The Project Management Plan (D1.5) documents in detail the project Work Breakdown Structure (WBS) and the related elements that support the project's schedule.

The actual schedule performance will be then periodically compared to planned performance in order to implement corrective action when actual performance deviates from planned or required performance. The Project Management Plan will be updated three times during the project execution (at Months 12, 24 and 36).

The internal monitoring will be facilitated by the project management structure. The Project Manager will monitor overall project progress with the help of the Work Package Leaders (WPLs). **WPLs will report progress made on technical tasks since last report at every Project Steering Committee (PSC) meeting every 6 months**.

Besides, **every partner should submit interim Financial Statements to the Coordinator for financial monitoring every 6 months**. Even though this is not a contractual obligation, it is strongly recommended, especially for partners with less management experience in European projects. The Coordinator will review, consolidate and inform WP Leaders.

The actual Gantt Chart will then reflect progress achieved and agreement of the revised schedule, if necessary.

These reports will allow monitoring the progress, gathering the information periodically and will be the base of the Periodic and Final Reports.

A template will be provided by the Project Manager and made available on the Collaborative Workspace.

4.1.2 EXTERNAL MONITORING

External monitoring will be carried out by the BBI-JU. This external monitoring will be based on the review of Project Reports and Deliverables by the reviewers selected by the BBI-JU. Project Deliverables, Periodic Reports (PR) and Final Report (FR) constitute the contractual obligations acquired by VIPRISCAR Consortium upon signature of the BBI-GA.

A detailed schedule of Project Deliverables is included in D1.5 Project Management Plan.

During the VIPRISCAR project, two Periodic Reports shall be submitted to the BBI-JU in English, covering the periods RP1 (from Month 1 to Month18) and RP2 (from Month 19 to Month 36). Further details on periodic reports are provided in Section 5.4.2 of this document.

4.2 PROJECT RISK MANAGEMENT

The VIPRISCAR project will implement a project risk management process that will monitor and control the project risks in a continuous manner. The PM will be in charge of this continuous follow-up, and **there will be a point dedicated to risk management in each Project Steering Committee (PSC) meeting**.

The risk management strategy will include the early identification of risk, the assessment of risk level, the assignment of risk ownership, risk mitigation ownership, and ownership for updated assessment of risk level after mitigation actions are implemented.

The PM has ownership of project risk management including of the project-wide execution of the risk management plan. Each WP Leader (WPL) has ownership of the technical risk associated the WP, except for those risks where he does not have the technical and financial capacity to implement risk mitigation. In this case, risk ownership is assigned to the Consortium as a whole.

At least regular **six-monthly project assessments** will be performed by the Consortium, to determine the advances/delay of the project with respect to the planned activities and identify any potential risk to define and apply any contingency action when it is necessary. Follow-up and decision of the risks associated to the project will be done at two different levels:

- **Technical risks**: Decisions to be taken at Project Steering Committee.
- **Management, Market and legislative risks**: Decisions to be taken at General Assembly level.

A register of residual risk has been created at the beginning of the project and will be updated during the project execution. The point 1.3.5. WT5 Critical implementation risks and mitigation actions (Annex 1 of the BBI-GA) identifies the potential risks and associated contingency plans in case of problems during the project execution. Periodic Reports update on the list of potential risks (foreseen or unforeseen), if they have been materialised and corresponding actions taken.

An internal project risk register will be maintained and stored in a root folder of the collaborative workspace. Each of the identified project risks will be scored using the product of probability (P) and impact (I) as depicted below.

Risk (R)		Probability (L)		
		Low	Medium	High
Impact (I)	High	3	6	9
	Medium	2	4	6
	Low	1	2	3

FIGURE 4.1: PROJECT RISK SCORE

- Green indicates that the project is on track. The identified risks are not expected to impact the other project metrics or overall business outcomes.
- Yellow indicates that some course correction may be required. One or more identified risks may impact the other project metrics or overall business outcomes and some course correction may be required.
- Red indicates that significant course correction may be required. One or more identified risks may impact the other project metrics or overall business outcomes and significant course correction may be required.

The update column shows if any change has been made since the last evaluation. A new risk has been included due to the impurities in the raw material. This has caused the necessity of more resources in the WP2, as well as an expected delay of 2 months because today a solution to the problem has been sought.

Annex II presents version 2.0 of the project risk register.

4.3 QUALITY CONTROL OF DOCUMENTATION

Quality control will be only applied to documents produced within the project, and particularly to the project deliverables. **It will involve a peer review process**.

Please note that this review process only took effect on deliverables due Month 6 (November 2018) or later. Previous deliverables were mostly preparatory actions or project management guidelines.

Publications of joint project results, e.g. conference papers, brochures, public documents, etc., need approval of the involved partners and/or Coordinator.

The review procedure uses the official delivery month as a baseline and tracks backwards in time to identify deadlines for the different quality assurance activities (reviews).

The peer reviewers must not be involved in the writing of the deliverable and should be capable of performing a good review. The reviewers have been selected from partners to act as peer reviewers for all deliverables in the WP according to the Table 4.1.

TABLE 4.1: APPOINTMENT OF PEER REVIEWERS

Reviewer	WP1	WP2	WP3	WP4	WP5	WP6	WP7	WP8	WP9
JOWAT						X			
CIKAUTXO					X				
B4P							X		
AEP								X	
VERTECH			X						
EXERGY				X					
GAIKER		X							X
LEITAT	X								

The official delivery month of the deliverable is represented by "DM". Unless agreed otherwise the term “delivery month" means “received by the recipient at 12:00 CET on the last workday in the project month “DM”, where Month 1 is June 2018. The official deadline for a deliverable due in Month 4 would therefore be Friday 28th September 2018 at 12:00 CET.

Table 4.2 depicts each step in the review procedure with reference to deadlines on basis of official delivery month.

TABLE 4.2: DELIVERABLE REVIEW PROCEDURE

When	Responsible	Action	Receiver
DM - 3 weeks	Project Manager	Confirmation of peer reviewer and remainder of quality check	WPLs Lead beneficiary
DM - 2 weeks	Lead beneficiary	Submit full deliverable in word format	Peer Reviewer Coordinator
DM - 1 week	Peer Reviewer Coordinator	Submit feedback on deliverable using "Track Changes", in a separate document and/or by email	Lead beneficiary
DM - 2 workdays	Lead beneficiary	Implement Peer Reviewer and Coordinator feedback in word format	Project Manager
DM	Project Manager	Final approval and official submission in pdf format (through EC portal)	BBI-JU

The Lead beneficiary (i.e. responsible partner for the deliverable) is in charge for compliance with the review procedure. The WP Leader has an overall responsibility for all deliverables in his/her WP while the Project Manager has the overall responsibility for all deliverables in VIPRISCAR.

It is not expected a technical expert feedback from peer reviewers; their feedback should focus on the following aspects:

- **Readability**:
  - Abbreviations and acronyms explained in separate list.
  - Spelling and language checked.
  - Layout / template checked.
- **Completeness**:
  - Is it according the original proposal objectives and meets the success indicator?
  - Does it contain all required chapters?
  - Does the executive summary give a short, non-confidential description of deliverable?
- **Consistency**:
  - Are the chapters consistent with each other?
  - Is it consistent with other deliverables?
  - Is it in accordance with the requirements of other WPs?

Annex III presents version 1 of the deliverables calendar

4.4 INNOVATION MANAGEMENT

Innovation management is the process for maximising the capability of project outputs of being successful in the form of future products, services or processes, by combining creativity and a technical and market wise perspective.

An effective innovation management system needs to include the innovation from the idea generation to the market results, especially on a project like VIPRISCAR, where the bio-based products sector needs a step change towards industrialisation.

VIPRISCAR will implement TECNALIA's Standard Innovation Management Process ISAMPE, a derivative of ISAEP model[1]. ISAMPE comprises:

- **Identification**. Improving the mechanisms for finding, capturing and communicating information about technologies (both internal and external) which may affect product development, production processes, opportunities and threats.

[1] Gregory, M.J. (1995), "Technology management: a process approach". Proceedings of the Institution of Mechanical Engineers Part B. Journal of Engineering Manufacture, 209 (B5). pp. 347-356. ISSN 0954-4054 1995 (also on the European Institute for Technology and Innovation Management, http://www.eitim.org/)

- **Selection**. Determining the portfolio of products and services and the associated production process technologies and their impact on environmental sustainability.
- **Acquisition (and Development)**. Technologies can be acquired either by internal development, external acquisition or co-development with partners.
- **iMpulse** to innovation learning and improvement. The culture of learning expands to become a culture of continuous improvement with a focus on results.
- **Protection**. The effective protection of early stage technologies (freedom to operate, patent, industrial secret …) is an important part of the innovation management system.
- **Exploitation (and Transfer)**. Technologies need to be effectively exploited if they are to deliver long-term growth. It can also be the case that new technologies might themselves lead to previously unforeseen product or market opportunities and could potentially change the business strategy.

Identification and selection of the exploitable results has been done during the proposal stage (Table 11 BBI-GA) and will be periodically updated within WP8. A first version of the exploitation plan will be also available (D8.7). It will contain the fundamental protection, exploitation and transfer strategies per exploitable result.

The outcomes of the innovation management process will be the focus of D8.7 Exploitation Plan (months 6, 12, 24 and 36).

5. INFORMATION MANAGEMENT

5.1 COMMUNICATION

Communication is fundamental to keep all the VIPRISCAR partners informed about the project status. The main communications mechanisms are E-mails, Collaborative Workspace, Project meetings, Technical documents, Dissemination of project results, and Reports.

All official communication with the Project Officer (PO) or the BBI-JU Services related to the VIPRISCAR project will be provided through the Project Manager. Currently, Mr. Polyvios Hadjiyiangou is the designated BBI-JU contact for the VIPRISCAR project.

5.1.1 E-MAILS

To facilitate internal communication and avoid unnecessary mails, E-mail distribution lists have been created. Only relevant information should be sent to the appropriate project participants, using the relevant mailing list. These lists and their **assigned recipients can be found in Annex I** (Contact list).

The subject line should indicate the term "VIPRISCAR" followed by a short explanation sentence or few keywords about the message in order to facilitate filtering and anti-span measures.

5.1.2 COLLABORATIVE WORKSPACE

To ensure an efficient project communication, **the Consortium has set up a collaborative workspace which will be used to store and exchange all relevant documents**, considering the dissemination level of documents and the access rights of different user groups. These include:

- Deliverables.
- Internal documents:
  - Meeting minutes and supporting documentation from project meetings and conference calls.
  - Progress reports.
  - Contacts lists.
  - Others considered useful by the Coordinator or the WPLs.
- Templates to be used when preparing:
  - Deliverables.
  - Meeting minutes.
  - Presentations.
  - Internal WP progress reports.

    - Internal Partner Financial statements
- Major documents and reports as:
    - Periodic Reports.
    - Final Report.
    - Other documents requested by the PO or the BBI-JU.
    - Other documents suggested and/or approved by WPLs.
    - Other documents requested/or approved by the GA or PSC.

The collaborative workspace is based on the MS SharePoint. It is an online platform that helps to securely store, share, manage, view and comment on any kind of document. This collaborative workspace can be easily accessed through the following link:

https://tecnalia365.sharepoint.com/sites/t.extranet/CD068180/default.aspx

5.1.3 DISSEMINATION OF PROJECT RESULTS

Dissemination and communication of project results are key activities for all partners involved in the project. Partners will agree the conditions to ensure proper dissemination and communication of the goals and generated knowledge, taking into account confidentiality and IPR protection aspects. The plan for dissemination and communication (D8.11) will be established by Month 6 and periodically updated (months 12, 24 and 36) with the goal of maximising the project impact.

The main communication channel for the project will be its website: www.vipriscar.eu (D8.15).

Any communication activity related to the action (including in electronic form, via social media, etc.) and any infrastructure, equipment and major results funded by the grant must display the EU emblem and the BBI-JU and BIC logos and include the following text to indicate that said result was generated with the assistance of financial support and that it reflects only the author's view:

- For communication activities: *"This project has received funding from the Bio Based Industries Joint Undertaking (JU) under the European Union's Horizon 2020 research and innovation programme under grant agreement No 790440. The JU receives support from the European Union's Horizon 2020 research and innovation programme and the Bio Based Industries Consortium".*
- For infrastructure, equipment and major results: "*This [infrastructure][equipment][insert type of result] is part of a project that has received funding from the Bio Based Industries Joint Undertaking (JU) under the European Union's Horizon 2020 research and innovation programme under grant agreement No*

790440. The JU receives support from the European Union's Horizon 2020 research and innovation programme and the Bio Based Industries Consortium."

- Disclaimer for both: *"This [insert type of result] reflects only the author's views and the BBI-JU is not responsible for any use that may be made of the information contained therein."*

When displayed together with another logo, the EU emblem and the BBI-JU and BIC logos must have appropriate prominence (the minimum height of the EU emblem shall be 1 cm).

Originals for reproduction are available for downloading at:

https://www.bbi-europe.eu/documents/official-logos-projects-high-resolution#overlay-context=participate/project-management

VIPRISCAR project will collaborate with the BBI JU Communications team (communications@bbi.europa.eu) by sharing:

- VIPRISCAR articles, publications, press releases, etc.
- The .jpeg and .eps logo file for the VIPRISCAR project in low & high resolution.
- Details of conferences, exhibitions, etc.
- Any digital assets linked to project (leaflets, flyers, posters).
- News from the projects for the BBI Newsletter.
- Any other relevant communications materials.

5.2 PROJECT MEETINGS

Meetings and conferences will be an integral part of the communication and management strategy. Efforts will be made to reduce travel costs (e.g. choosing cost-effective locations, etc.) without compromising strategy. To reduce travel costs, meetings will be held as much as possible virtually, through the use of an audio or video conferencing tool, such as Skype for Business or WebEx.

The Table 5.1 shows who must attend each meeting and what is the purpose of these meetings.

TABLE 5.1: VIPRISCAR MEETINGS

Meeting	Who	What
Project Kick-off (KOM)	All partners, BBI-JU Officer	To discuss the work plan, the structure of the project organisation, the flows of information and to promote cooperation.
Project Steering Committee (PSC)	PM, WPLs, and IM	To co-ordinate and monitor the work of different WPs, discussing the project work progress and co-ordination, outstanding actions, and ad hoc issues.
Work Package Meetings (WP)	WPLs, TL, members	To focus the work within a WP; a status report is generated for PTM and distributed to all participants.
General Assembly (GA)	All partners	To control the whole project commitment to the final objectives, costs and deadlines. To control the progress regarding the final goal of the project.
Advisory Board (AB)	AB, PM, WPLs, and IM	To follow the project development, provide information, advice and guidance to orient the project development towards the right scientific and market targets.
Project Review Meeting	PM, WPLs and BBI-JU Officer	To review the documents submitted within the period: periodic report, financial statements and all deliverables due in the reporting period.
Final Meeting (FM)	All partners, BBI-JU Officer	Revision of the project achievement and last Milestone. Agreement on the strategy to provide continuity of the project results.

Meetings for the different management bodies have been planned for the entire project lifetime, as depicted in Figure 5.1. Additionally, Project Review Meetings will be convened as required by the BBI-JU (tentative month 21). In M15, the Project Manager will take contact the PO to set up the modalities of the review. The next meeting will be held in Brussels on 28th of June.

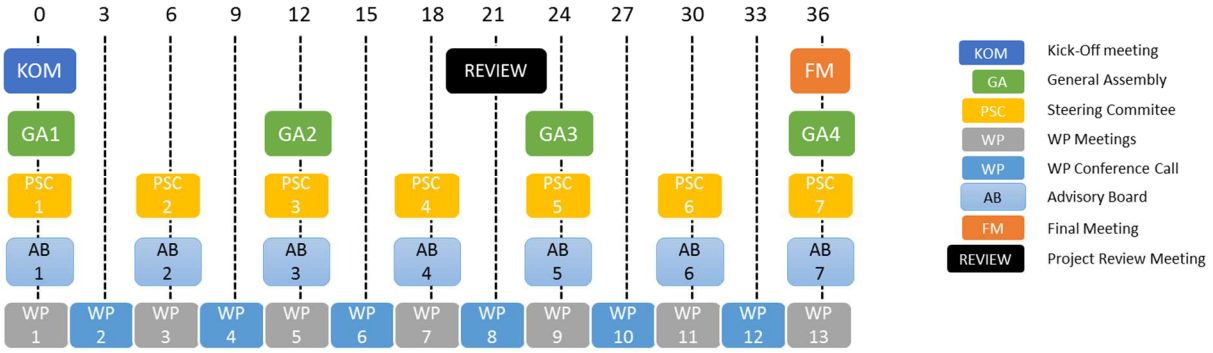

FIGURE 5.1: PROJECT TIMELINE AND ASSOCIATED MEETINGS AND CONFERENCE CALLS

Any partner, which is a member of a project management body should be present or represented at any meeting of such body and may appoint a substitute or a proxy to attend and vote at any meeting.

The chairperson of the project management body will **convene meetings** of that body. The chairperson shall give notice in writing of a meeting to each member as soon as possible and no later than the minimum number of days preceding the meeting as indicated below.

	Ordinary meeting (OM)	Extraordinary meeting (EM)
General Assembly	45 calendar days	15 calendar days
Project Steering Committee	14 calendar days	7 calendar days

The chairperson shall prepare and send each representative a **written agenda** no later than the minimum number of days preceding the meeting as indicated below.

General Assembly	21 calendar days for OM, 10 calendar days for EM
Project Steering Committee	7 calendar days

Any agenda item requiring a decision by the representative must be identified as such on the agenda. Any representative may add an item to the original agenda by written notification to all of the other members up to the minimum number of days preceding the meeting as indicated below.

General Assembly	14 calendar days for OM, 7 calendar days for EM
Project Steering Committee	2 calendar days

The chairperson shall produce **written minutes** of each meeting which shall be the formal record of all decisions taken. The chairperson shall send the draft minutes to all the representatives within 10 calendar days of the meeting and shall be considered as accepted if, within 15 calendar days from reception, no representative has objected.

The **action and decision lists** will be generated together with the minutes of the meetings, being part of them. These lists will include information about the open issue, the responsible for each solution and the deadline for the open action. During each meeting of the project management bodies, the list will be reviewed and updated, in order to make the follow up of the open issues in each moment.

There will be no requirements on the minimum number of days for WP and tasks meetings. However, it is strongly recommended to plan them with at least one week in advance, send an agenda before and produce written minutes afterwards.

5.3 DOCUMENT MANAGEMENT

5.3.1 DOCUMENT TEMPLATES

Templates for the most relevant project documentation have been prepared by means of Microsoft Office 2010.

It is compulsory to use the templates for all the documentation generated within VIPRISCAR project.

The documentation templates are the followings:

- Deliverables.
- Meetings minutes.
- Presentations.
- Internal WP Progress Report.

5.3.2 DOCUMENT AND FILE NAMING

All files stored on the project archive should adhere to the following naming conventions:

VIPRISCAR_<DX.Y/WPX/TX.Y>_<Title>_ <Version>_<Date>.filetype

Where:

<DX.Y>	Deliverable number, e.g. “D2.3” for Deliverable 2.3.
<WPX>	Work Package identifier, e.g. for example “WP1” or ”WP2”.
<TX.Y>	Task number, e.g. “T3.1” for Task 3.1.
<Title>	Short description of document.
<Version>	Version identifier, e.g. ‘v1’.
<Date>	Date in “yyyymmdd” format.

Example:

VIPIRSCAR_D1.1_Quality Assurance Plan (I)_v1_20180208.docx.

5.3.3 DOCUMENTS STATUS

The documents status will be defined according to the next table:

TABLE 5.2: DOCUMENT STATUS

Status	Description	Responsible
Draft	The primary author of a deliverable has at least defined the Table of Content (ToC) of the document and expected contributions from partners are under edition.	Lead beneficiary
Released	The edition process is finished and the document is ready to be peer reviewed.	Lead beneficiary
Reviewed	The peer review has been completed and the feedback has been sent to the primary author.	Peer reviewer
Approved	The document is approved by the Project Manager and is ready for submission to the BBI-JU. This version must be available for the delivery date.	Project Manager

5.3.4 DISSEMINATION AND SECURITY LEVEL

The dissemination and security levels should be **marked at the first page of the documents** in order to make them clearly visible.

According to the BBI-GA, deliverables are either Public or Confidential, that is, only for members of the consortium (including the Commission Services). The Adobe Acrobat PDF will be used for distributing documents outside the VIPRISCAR Consortium.

Internal documents can be further classified as:

- Unrestricted.
- Restricted to WP.
- Restricted to Persons.

In case of any lack of clarity, internal documents are to be regarded as restricted and only for internal information of the recipients.

5.4 REPORTING

5.4.1 STATUS REPORTS BY WP LEADERS AND PARTNERS

Each WP Leader will be required to submit a **3-monthly status report** from their respective WP to the Project Manager within 10 working days following the end of the month. In broad terms this status report will contain information on:

- Significant results obtained.
- Compliance with the work program.
- Reasons for deviations (if any).
- Possible risks and corrective actions.
- New plans for next three-month period.

Besides, every partner should submit **interim Financial Statements every 6 months** for financial monitoring of the project.

A template will be provided by the Project Manager and made available on the Collaborative Workspace.

5.4.2 PERIODIC AND FINAL REPORTS

The VIPRISCAR Grant Agreement (BBI-GA) specifies the reporting requirements imposed on the Project Coordinator and each beneficiary. It is also important to remark that project reporting is a responsibility of the whole Consortium and every partner has to be involved in it. The Project Manager is the responsible for gathering the information/reports from the different partners and consolidating them before the official submission of these reports to the BBI-JU.

Regarding financial information, the BBI-GA defines each beneficiary's responsibility, while coordinator will provide reporting templates for the technical progress in order to secure all relevant information being reported to the coordinator by WP Leaders.

VIPRISCAR is divided into the following reporting periods:

- RP1: From M1 to M18 (June 2018 to November 2019).
- RP2: From M19 to M36 (December 2019 to May 2021).

The Coordinator must submit a periodic report within 60 days following the end of each reporting period. The **Periodic Report** must include the following:

- Periodic Technical Report.

- Explanation of the work carried out by the beneficiaries.
- Overview of the progress towards the project objectives, including milestones and deliverables, explanations justifying the differences between work expected to be carried out, the exploitation and dissemination of the results, an updated version of dissemination and communication plan and the exploitation plan as defined in the VIPRISCAR Description of Action.
- Summary for publication by the BBI-JU.
- The answers to the questionnaire, covering issues related to the action implementation and the economic and societal impact, notably in the context of the BBI-JU and the Horizon 2020 key performance indicators and BBI-JU and the Horizon 2020 monitoring requirements.

- Periodic Financial Report
  - Individual financial statement from each beneficiary.
  - Explanation of the use of resources and the information on subcontracting and in-kind contributions provided by third parties.
  - Periodic summary financial statement.

Each WP Leader is required to submit a Periodic Report regarding technical progress of the WP in question (on the periodic report template provided by the PM) no later than 30 days following the end of each reporting period. The consolidated status reports for the period should be the basis for this periodic technical report.

Each beneficiary is required to fill in financial Statement through the SyGMa application in the participant portal no later than 30 days following the end of each reporting period. Again, the interim Financial Statements should help on this task.

The delay in the submission of these reports may cause the postponement of part of the next payment to be received by the partner until the next reporting period.

In addition to the Periodic Report for the last reporting period, the PM must submit the **Final Report** within 60 days following the end of the last reporting period. The final report must include the following:

- Final Technical Report with a summary for publication:
  - Overview of the results and their exploitation and dissemination.
  - Conclusions of the project.
  - Socio-economic impact of the project.
- Final Financial Report:
  - Final summary financial statement.
  - Certificate on the financial statements.

Each WP Leader is required to submit a Final Report regarding the technical results of the WP in question (on the final report template provided by the Coordinator) no later than 30 days following the end of last reporting period.

Each beneficiary is required to fill in Financial Statement through the SyGMa application in the participant portal no later than 30 days following the end of last reporting period.

5.5 GENDER ASPECTS

According to Art. 33 of the BBI-GA, beneficiaries must aim, to the extent possible, for a gender balance at all levels of personnel assigned to the action, including at the supervisory and managerial levels. In order to verify the compliance with this obligation, the Consortium should provide explanations on the specific steps taken and measures put in place to support this requirement.

The VIPRISCAR project will improve the gender balance in the project consortium, encouraged women's employment especially in research areas, and have policies that dictate equal opportunities for applicants irrespective of gender, race or religious beliefs. To foster the direct participation of female scientists and researchers in all activities of the project, from management to technology development, exploitation, dissemination and communication. Actions such as the establishment of a more flexible work schedule, possibility of joining the meetings via teleconferences and in general, measures to help reconcile work and family life will be promoted. VIPRISCAR has involved 15 (50%) female personnel who will carry the work planned and being one of them the Project Manager (Dr. Soraya Prieto). Further actions will be done to promote further women's participation in research.

In order to track progress of gender aspects, partners will report the number of female and male participants in each Periodic Report to the BBI-JU through the SyGMa application in the participant portal.

Figure 5.2. shows the information to be reported.

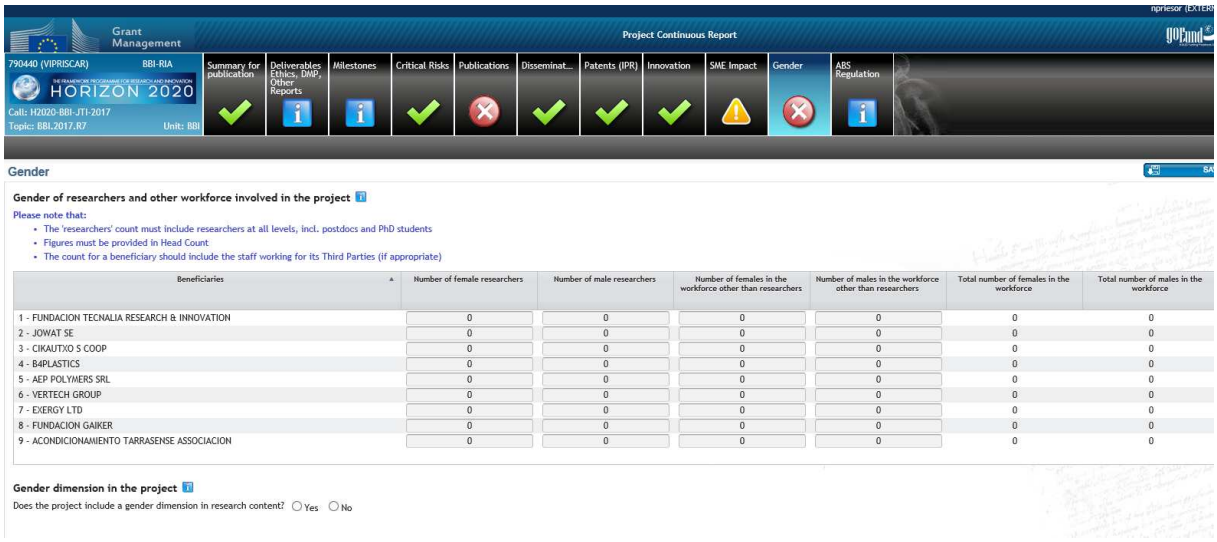

FIGURE 5.2: GENDER ASPECTS

5.6 ETHICS AND RESEARCH INTEGRITY

According to Art 34 of the BBI-GA, the beneficiaries must carry out the project in compliance with:

a) Ethical principles (including the highest standards of research integrity).
b) Applicable international, EU and national law.

Activities raising ethical issues must comply with the ethics requirements set out in deliverables D9.1 and D9.2.

ANNEX I: CONTACT LIST

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WP2: IBMC process development and validation at lab scale

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WP3: IBMC process validation at pilot plant

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WP4: Coating application proof-of-principle

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WP5: Adhesives application proof-of-principle

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WP6: Bifunctional catheters application proof-of-principle

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WP7: LCA, REACH and costs analysis

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WP8: Exploitation, Dissemination and Communication

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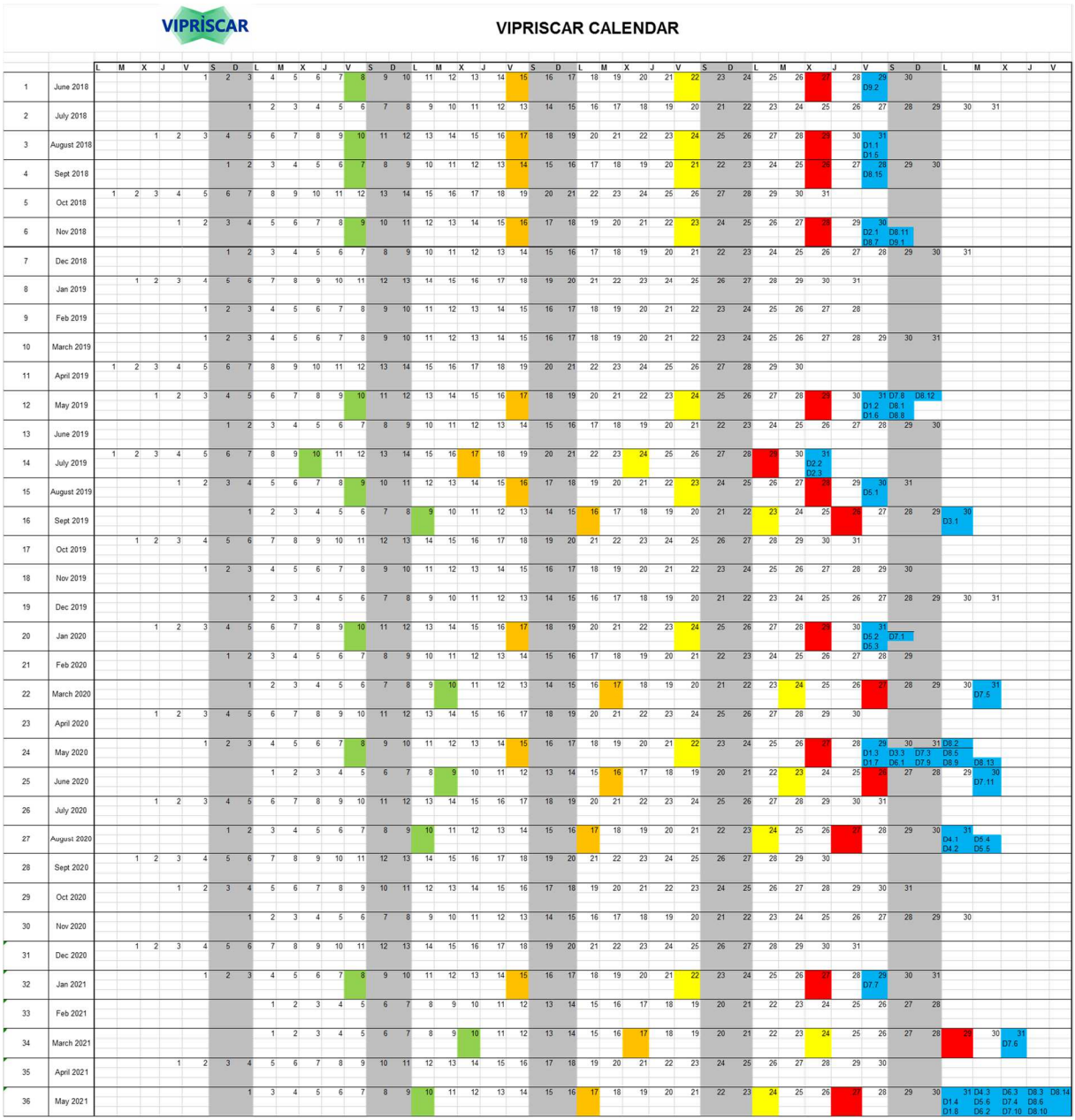
ANNEX II: PROJECT RISK REGISTER

Nº	Type	Description of Risk	Risk Level[1]			Update	WP	Risk Holder[2]	Proposed risk-mitigation measures
			P	I	R				
1	Management	Delay in consortium agreement signature	L	M	2	_	1	PC	Accelerated face-to face negotiation if needed. Most partners know each other and build further trust during proposal preparation and evaluation, so that this risk is low.
2		Closing the activity of one company or partner leaving the consortium	L	H	3	_	1	GA	The consortium is highly qualified and they would assume the tasks from the partner that has left the project. Likewise, thanks to their large contact network, the consortium would find in the shortest time the best partner for assume the role lost.
3		Delay of one partner providing reports or activities	L	M	2	_	1	PC	All the duration estimation of the tasks has been made with the agreement of all the partners, so that the deliverables should be given in time. In case of delay of one task, that would suppose the delay of some others, an adjustment on the tasks duration will be made, aiming at accomplishing the time targets established in the project, asking for additional effort to that partner responsible for the delay
4		Problems between partners (IPR, internal disagreement, etc.)	M	M	4	_	1	PC	The procedures have already accepted in the CA. A democratic and dialectic approach will be applied in all the consortium meetings and correspondence. IPR issues will be discussed and established within a common CA, signed by all the partners. Solvency of project partners has been assessed.
17	Technical	impurities in the raw material (IS)	M	M	4	M12	2	WPL	Search for alternative reaction conditions (catalyst, T…)
5		IBMC yield is below 98%	L	M	2	_	2	WPL	Check multiple catalysts
6		Purity of IBMC below 98% because the amount of oligomers is not strongly reduced	L	M	2	_	2	WPL	Intensified downstream process based on an effective crystallization procedure, much less energy-intensive that vacuum evaporation.
7		Decrease in yield and/or productivity during IBMC synthesis scaling-up	L	H	3	_	3	WPL	Modify reactor design (e.g., type of impeller; heating system); scale-down to analyse and solve problems; involve other partners with expertise in scaling-up (Jowat, AEP Polymers)
8		Lack of accurate experimental data for accurate simulation and up-scaling of the process	M	L	2	_	3	TL	Use of data from literature or some modules will be simulated as "black boxes" using the available data (e.g. yields instead of kinetics). This will guarantee the building of the model and the complete simulation of the entire process. Recommendations will be provided in the correspondent deliverable
9		Failure in synthesis of IBMC-derived polymers for coatings or in reaching suitable molecular weights	M	M	4	_	4	TL	Check multiple catalysts and different chain extenders
10		Formulations of IBMC-derived polymers for coatings not reaching target properties as coatings	M	M	4	_	4	TL	Check multiples components and formulation strategies; modifying the IBMC-derived polymers base component
11		Formulations of isocyanate-free coatings not possible due to process conditions of insufficient final properties	M	M	4	_	4	TL	Use IBMC-based NIPUs in standard 2K PU and polyurea systems based on isocyanates, aiming at an isocyanate content reduction of 50-75% compared to traditional systems
12		Failure in synthesis of IBMC-derived polymers for adhesives or in reaching suitable molecular weights	M	M	4	_	5	TL	Check multiple catalysts and different chain extenders
13		Formulations of IBMC-derived polymers for adhesives not reaching target properties as adhesives (medium)	M	M	4	_	5	TL	Check multiples components and formulation strategies; modifying the IBMC-derived polymers base component
14		Failure in synthesis of IBMC-derived molecules for biomedical applications	M	M	4	_	6	TL	Check multiple catalysts and different synthetic strategies
15	Market	Manufacturing costs of IBMC/IBMC-derived polymers are too high	M	M	4	_	4-6	WPLs	Processes will be modified/optimized
16	Legislative	Standards are not accurate for application (medium)	M	M	4	_	7	PC-WPL	Measures and guidelines for standardization will be developed

[1] L (Low), M (Medium), H (High)
[2] GA (General Assembly), SC (Steering Committee), PC (Project Coordinator), WPL (Work Package Leader), TL (Task Leader)

ANNEX III: DELIVERABLES CALENDAR



ANNEX III: PROJECT TEMPLATES

Deliverables

Validation of an industrial process to manufacture isosorbide bis(methyl carbonate) at pilot level

Deliverable [Deliverable number]

[Title]

Lead Beneficiary	Enter company name
Delivery Date	Pick a delivery date
Dissemination Level	Choose a level
Status	[Status]
Version	[Version]
Keywords	[Keywords]

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Meeting minutes

Validation of an industrial process to manufacture isosorbide bis (methyl carbonate) at pilot level

VIPRISCAR

Minutes of the Meeting

[Title of Meeting]

MEETING DETAILS

Dates: dd-mm-yy

Venue: Location

Organiser: Partner name

ATTENDEES

Name	Initials	Partner	June 20th	June 21st

AGENDA

ATTACHMENTS

File Name	Content

ACTIONS

ID	Description	Responsible	Due date

MINUTES

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Presentations

Internal WP Progress Report

Validation of an industrial process to manufacture isosorbide bis(methyl carbonate) at pilot level

Internal WP Progress Report

[WPx technical progress from MXX to MXX]

Lead Beneficiary	Enter company name
Delivery Date	Pick a delivery date
Dissemination Level	Choose a level
Status	[Status]
Version	[Version]
Keywords	[Keywords]

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