

TANGENT

PROJECT MANAGEMENT HANDBOOK. SECOND RELEASE.

D9.5.



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Document approval	All partners

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Executive summary

This deliverable, “D9.5. Project management handbook. Second release.”, intends to gather the different updates on management made, since D9.1. was delivered in month 2 of the project (November 2021), up to month 18.

This report covers the changes in managerial aspects related to project structure, consortium coordination procedures, quality and risk management, project reporting, document management, decision-making and conflict resolution and payment procedures.

A third report (“D9.6. Project management handbook. Third release”) covering project management aspects will be delivered at the end of the project, month 36 (August 2024).

Key words

Project management, H2020, project reporting, management procedures.

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List of abbreviations and acronyms

Acronym	Meaning
PMH	Project Management Handbook
N/A	Not applicable
WP	Work package
WPL	Work package leader
EC	European Commission
PMB	Project Management Board
PTC	Project Technical Committee
IEB	Innovation & Exploitation Board

1 Introduction

The Project Management Handbook (PMH) covers aspects related to the project's structure in terms of organization, project procedures, communication strategy within the consortium and quality assurance procedures. The PMH provides useful information to all partners about the procedures that will be followed during the project execution for communication and reporting purposes. The PMH is a living document that is updated along the project's lifetime.

This deliverable aims to cover the different updates on management on the first version of the "D9.1 Project Management Handbook" (M2). Hence, this report reviews each of the sections contained in D9.1. identifying the changes during the project lifetime up to M18, covering:

- Project management structure
- Internal coordination procedures
- Quality and risk management
- Project reporting
- Document management
- Decision-making process and conflict resolution
- Payment procedures

2 Project management structure

In Deliverable 9.1 the project management structure was detailed, describing the **project boards** and **management figures**. The boards in TANGENT are: Project management board, Project Technical Committee, Innovation & Exploitation Board and the TANGENT Forum.

Different representatives were nominated for the different boards, and along the first period there have been some changes.

The following figures remain the same: Project coordinator, Technical coordinator, Case study leaders and TANGENT Forum chair. The Innovation & Exploitation Board, has been chaired until December 2022 by Ms Isabelle Dussutour (ID4CAR), from January 2023 will be represented by Lucie Tristant (ID4CAR).

Along the first period there have been new appointments to the boards by some of the partners: IMEC, ID4CAR, CEFRIEL, PANTEIA and POLIS. The updates are shown next.

No	Organisation name	PMB	PTC	IEB	
1	DEUSTO	Leire Serrano	Antonio Masegosa	Leire Serrano	
2	AIMSUM	Athina Tympakianaki	N/A	Athina Tympakianaki	
3	NTUA	Eleni Vlahogianni	Eleni Vlahogianni	Eleni Vlahogianni	
4	IMEC	Ynte Vanderhoydonc (replacing Peter Hellincks)	Mohammadmahdi Rahimiasl (replacing Toon Bogaerts)	Siegfried Mercelis	
5	CEFRIEL	Marco Comerio	Marco Comerio	Marco Comerio	
6	RUPPRECHT	Wolfgang Backhaus	Morgane Juliat	Wolfgang Backhaus	
7	ID4CAR	Véronique Rottier	Véronique Rottier	Lucie (replacing Dussutour)	Tristant Isabelle
8	RENNES	Céline Quéron	N/A	Céline Quéron	
9	A-to-B	Lara Moura	Tiago Dias	Lara Moura	
10	CARRIS	Joao Vieira	N/A	Joao Vieira	
11	TFGM	Hannah Tune	N/A	Hannah Tune	
12	PANTEIA	Arnaud Burgess	N/A	Geert (replacing Teoh)	Koops Tharsis
13	POLIS	Mark Meyer (replacing Raffaele Vergnani)	Suzanne Hoadley	Juliette (replacing Vergnani)	Thijs Raffaele

Table 1: Updates on the nomination to board during the first period

3 Internal coordination procedures

Due to the collaborative nature of TANGENT project, *periodic meetings* have been planned for monitoring the project progress and different *information & communication tools* have been implemented.

Regarding the meetings, there are no updates on the procedure for setting the meetings of the different boards.

In relation to the different information and communication tools in the project:

- Google Drive is being used for document exchange. So far, there have not been any changes.
- There are different emailing lists for making communication easier among the partners. A new list has been created for communications related to TANGENT FORUM management, (tangent.forum.contact-group@deusto.es).

4 Quality and risk management

In D9.1 the process of the quality check of the deliverables is detailed, identifying different stages, the responsible partners, as well as the timings. The timings of each of the phases has been updated in order to improve the process of quality check of deliverables, it has been indicated in the following table:

Phase	Who	Summary of the action
Definition of the general structure of the deliverable	Partner responsible of the deliverable	<p>The partner responsible for the deliverable will provide the other contributing partners with a general structure of the deliverable at least 6 weeks before the submission deadline. The structure of the reports will be reviewed on the periodic audio conferences planned in the project, at overall project level (monthly progress audio conferences) or at WP level.</p> <p><u>Note – update in D9.5:</u></p> <p><i>The change comparing to the first version of the Project Management Handbook (D9.1) is the timing. In D9.1 it stated at least 4 weeks, now will be 6 weeks.</i></p>
Initial Quality Check by Author of the contents	Partner responsible of the deliverable & Authors	<p>The partner responsible for the deliverable will elaborate the report with the inputs of the partners involved and check spelling, grammar and readability.</p>
Internal review	<p>Partner responsible of the deliverable &</p> <p>Internal reviewers</p>	<p>The deliverable will be distributed to the partners appointed as internal reviewers and WP leader, at least 3 weeks in advance before the deadline of submission. They will check the contents, structures, consistency and whether the deliverable is in line with the Grant Agreement.</p> <p><u>Note – update in D9.5:</u></p> <p><i>The change comparing to the first version of the Project Management Handbook (D9.1) is the timing. In D9.1 it stated at least 2 weeks, now will be 3 weeks.</i></p>
	<p>Partner responsible of the deliverable &</p> <p>All partners</p>	<p>After implementing the suggestions from the WPL and the internal reviewers the leading partner will distribute the report to all project partners, at least 10 days in advance before the deadline of submission for comments or suggestions.</p> <p>Additionally, some specific partners appointed specified in D9.1 will need to approve the deliverable.</p> <p><u>Note – update in D9.5:</u></p> <p><i>The change comparing to the first version of the Project Management Handbook (D9.1) is the timing. In D9.1 it stated at least 1 week, now will be 10 days.</i></p>

Phase	Who	Summary of the action
Submission to ECAS	Partner responsible of the deliverable	After updating the report following the comments received from partners, the leading partner will send the deliverable to the coordinator, at least 3 days before the deadline of submission. <u>Note – update in D9.5:</u> <i>The change comparing to the first version of the Project Management Handbook (D9.1) is the timing. In D9.1 it stated at least 2 days, now will be 3 days.</i>
	Project coordinator	The Project coordinator submits the deliverable to the EC complying with the established deadline.

Table 2: Deliverables reviewing process

Furthermore, there have been some updates on the internal reviewers and partners approving the deliverables:

- “D5.4. Calibration of arbitration models”, Deusto have been removed from the list of internal reviewers as it is the responsible of the deliverable.
- “D7.2. System deployment and testing specifications”, A-to -Be and Aimsun have been added to the list of approvers.

WP No	Del.No.	Title	Lead Benef.	Nature	Diss. Level	Del. Month	Internal reviewers	Approval from partners
WP5	D5.4	Calibration of arbitration models	DEUSTO	Report	Confidential	26	Rupprecht	Rupprecht
WP7	D7.2	System deployment and testing specifications	ID4CAR	Report	Confidential	18	A-to-Be, Aimsun	IMEC, NTUA, Deusto, CEFRIEL, A-to-Be, Aimsun

Table 3: Updates on the internal reviewers and partners approving deliverables

In relation to risk management, the risk identification process is detailed in D9.1, including the procedure for risk assessment and problem resolution.

The procedure for risk management has not been altered from the initial version.

5 Project reporting

In D9.1 the reporting aspects of TANGENT are covered, including: the submission of deliverables and the periodic/ final reporting to the European Commission. There have not been any changes in this regard.

Besides, the Internal Progress Report in the project is detailed. The Internal Progress Report aims to gather technical and financial information every six months from each of the partners in order to monitor the project progress. The periodicity of the Internal Progress Report is every 6 months and a specific template has been defined, which is included in D9.1.

For the periodic/final report a template for reporting financial aspects has been defined, included in Annex I. For the technical aspects the template provided by the EC will be used.

6 Document management

In D9.1 the *types of documents* in TANGENT are detailed, this being: deliverables, meeting minutes, agenda for meetings, presentations and other documents. The template for deliverables has been updated and it is available in Annex II.

Also, an *identification policy for documents* is described together with the procedure for documents *record control*. This remains the same.

7 Decision-making process and conflict resolution

In D9.1 the process for decision-making and conflict resolution is described, including the voting rules and the escalation process for technical issues resolution. The procedure remains the same.

8 Payment procedures

There are three types of payments in TANGENT: pre-financing, interim payments and payment of the balance. At this point, the pre-financing payment has been distributed as follows: the first instalment was the 70% of the pre-financing amount (released in October 2021) and the second instalment (30% of the prefinancing) was released in September-November 2022, after receiving the second “Internal Progress Report” from the partners, as stated in the Consortium Agreement.

The status of the payments is shown in the table below:

Partner name	Pre-financing payment (first instalment)	Pre-financing payment (second instalment)
DEUSTO	431.825,62 €	185.068,12 €
AIMSUN	227.718,75 €	97.593,75 €
NTUA	293.212,50 €	125.662,50 €
IMEC	220.095,09 €	94.326,47 €
CEFRIEL	215.578,12 €	92.390,62 €
RUPPRECHT	192.281,25 €	82.406,25 €
ID4CAR	255.281,25 €	109.406,25 €
RENNES	36.421,87 €	15.609,37 €
A-TO-BE	293.261,72 €	125.683,59 €
CARRIS	77.437,50 €	33.187,50 €
TFGM	84.460,03 €	36.197,16 €
PANTEIA	94.565,62 €	40.528,12 €
POLIS	123.768,75 €	53.043,75 €
Total	2.545.908,09 €	1.091.103,47 €

Table 4: Distribution of prefinancing payment

9 Conclusions

In October 2021, month 2 of the project, the first version of the Project Management Handbook (D9.1) was released, describing the management procedures in TANGENT. Since the PMH is a “live” document, this second release presents the updates on management aspects from the first version of the document.

The present deliverable reviews all the contents in D9.1, and details updates, specifically on:

- Project management structure: new appointments on the representatives of the boards are included.
- Internal coordination procedures: an update on information and communication tools is included.
- Quality and risk management
- Project reporting: including a template for reporting.
- Document management: including a new version of the template of deliverables.
- Payment procedures: the status of the payments is detailed.

In month 36, August 2024, there will be a final version of the deliverable gathering the relevant updates, this being “D9.6 Project Management Handbook. Third release”.

10 References

Merino, N., Serrano, L., (2021). TANGENT: D9.1. Project Management Handbook.

European Commission (2021), Grant Agreement of TANGENT project (955273).

TANGENT Consortium (2021), Consortium Agreement of TANGENT project.

Annex I Templates for periodic & final reporting

Financial overview RP1



Reporting Period 1: 1 Sept 2021 28 Feb 2023

Note: Please provide the relevant financial figures for Period 1 as stated in the financial statement in ECAS.

Participant Short Name	PERSONNEL COSTS	SUBCONTACTING	OTHER DIRECT COSTS	TRAVEL	EQUIPMENT	OTHER GOOD & SERVICES	INDIRECT COSTS	TOTAL COSTS CLAIMED	MAXIMUM REIMBURSEMENT	TOTAL COSTS FOR DISSEMINATION AND COMMUNICATION ACTIVITIES*
1. DEUSTO	0	0	0				0	0	0	
2. AIMSUN	0	0	0				0	0	0	
3. NTUA	0	0	0				0	0	0	
4. IMEC	0	0	0				0	0	0	
5. CEFRIEL	0	0	0				0	0	0	
6. RUPPRECHT	0	0	0				0	0	0	
7. ID4MOBILITY	0	0	0				0	0	0	
KEOLIS	0	0	0				0	0	0	
EEGLE	0	0	0				0	0	0	
TOTAL Beneficiary 7	0	0	0	0	0	0	0	0	0	
8. RENNES	0	0	0				0	0	0	
9. A-to-Be	0	0	0				0	0	0	
VIAVERDE	0	0	0				0	0	0	
TOTAL Beneficiary 9	0	0	0	0	0	0	0	0	0	
10. CARRIS	0	0	0				0	0	0	
11. TFGM	0	0	0				0	0	0	
12. PANTEIA	0	0	0				0	0	0	
13. POLIS	0	0	0				0	0	0	
TOTAL	0	0	0	0	0	0	0	0	0	0

Staff effort overview



Reporting Period 1 1 Sept 2021 28 Feb 2023

Note: Please provide the staff effort amounts for reporting Period 1 as stated in the financial statement in ECAS

Participant Short Name	WP1	WP2	WP3	WP4	WP5	WP6	WP7	WP8	WP9	TOTAL person/month
1. DEUSTO										0
2. AIMSUN										0
3. NTUA										0
4. IMEC										0
5. CEFRIEL										0
6. RUPPRECHT										0
7. ID4MOBILITY										0
KEOLIS										0
EEGLE										0
8. RENNES										0
9. A-to-Be										0
VIAVERDE										0
10. CARRIS										0
11. TFGM										0
12. PANTEIA										0
13. POLIS										0
TOTAL	0	0	0	0	0	0	0	0	0	0

Annex II Templates for deliverables



List of figures

Figure 1. Label of the first figure. _____ §

List of tables

Table 1. Label of the first table. _____ §

List of abbreviations and acronyms

Acronym	Meaning
ASAP	As Soon As Possible
B2B	Business-to-business
B2C	Business-to-Consumer
EC	European Commission
GA	Grant Agreement
KJM	Kick-off Meeting
KPI	Key Performance Indicator
WP	Work Package

1 Introduction

1.1 Attainment of the objectives and explanation of deviations

Explain shortly whether the objectives of this deliverable have been achieved. If not achieved, please include the reasons why it is not the case. In case of the delay in the submission, explain the reasons and indicate by how many weeks/months your deliverable was delayed. In case of no delay and full achievement of the objectives, you can include the standard text: "The objectives related to this deliverable have been achieved in full and as scheduled".

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Figure 1. Label of the first figure

1.3 Structure of the deliverable and links with other work packages/deliverables

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1.4 Example of citation

Citation of a paper (X, 2018)

2 Title, subtitle and first chapter with content of deliverable

Subtle emphasis

3 Header 1 (18 pt)

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2.1.1 Header 3 (10.5 pt)

2.1.1.1 Header 4 (10.5 pt)

2.1.1.1.1 Header 5 (10.5 pt)

Standard (10.5 pt)

Emphasis

Intense emphasis

- List enumeration character 1
- List numbering

Table Column title
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Tables

Colors and hexads

- Please use styles, fonts and font-dimension suggested by this template.
- For tables and graphs pick colours and related shades included in the palette of the theme.

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	0/38/64/14	231/115/81	47951
	0/8/55/13	233/195/106	66c40a
	0/33/8/11	244/162/07	Ha281
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	0/76/84/0	153/153/153	000000

4 Conclusions

The main conclusions of the report must be described.
 This section is mandatory.



5 References

1. Author (2000). Title etc.
2. Author (2000). Title etc.
3. Author (2000). Title etc.

For each reference, please choose the appropriate referencing style:

Journal

Author (Year). Title. Journal, Volume (Issue), pp. page#-page#.

Book

Author (Year). Title (Edition). City: Publisher.

Book section

Author (Year). Title. In Editor name (Ed.), Book Title (Edition, pp. page#-page#). City: Publisher.

Conference paper

Author (Year). Title. Paper presented at the Conference Name, Conference Location. Retrieved from URL.

Web page

Author (Year). Title. Retrieved on Date from URL.

General



Author (Year). Title. In Secondary Author (Ed.), Secondary Title (Edition, pp. page#-page#). City: Publisher.



Annex

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