CulturalRoad

Cocreate, Embrace

Project deliverable D6.1

Project Management Handbook

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LIST OF ABBREVIATIONS AND ACRONYMS

Acronym	Meaning
CCAM	Connected, Cooperative, Automated Mobility
DEC	Websites, patent filings, videos, etc.
EC	European Commission
GA	General Assembly
PU	Public
R	Document, report
SC	Steering Committee
SEN	Sensitive
WP	Work Package

EXECUTIVE SUMMARY

CulturalRoad aims to leverage participatory planning to incorporate cultural and geographical diversity into more equitable Cooperative, Connected and Automated Mobility (CCAM) deployment strategies and increase societal acceptability across different regions in Europe and Worldwide.

The Deliverable 6.1 *Project Management Handbook* summarises the project management strategy and guidelines, providing information about specific management procedures, rules, roles, and responsibilities, including technical, quality and risk management procedures and plans. The project management handbook provides details of the management structure, decision-making processes, related ethical issues management and handling of the data acquired and generated during the CulturalRoad project.

The purpose of this handbook is to support the CulturalRoad consortium in the regular execution of project activities to serve as a comprehensive internal guide for all the partners in navigating the project. It aims is to be used as a reference guide. Therefore, it includes key information on the structure of the project and guidance around evaluating risk, continuously assessing the compliance with the time schedule of tasks and the budget execution, managing quality and producing deliverables (including the appropriate reviews).

It describes the governance bodies: the General Assembly (GA) and the Steering Committee (SC) as well as the relevant meetings and reports, the internal rules and procedures relating to or complementing the Grant Agreement and the Consortium Agreement.

This handbook is a living document and will be continuously updated throughout the lifetime of the project. This handbook has no legal function.

1 INTRODUCTION

1.1 Purpose and Target Group

The project handbook is the first delivery of the CulturalRoad project (Delivery 6.1) and outlines the project management strategy, guidelines and tools that will ensure the effective and high-quality execution of the project tasks and results. The purpose of this handbook is to provide a comprehensive but concise guide for navigating the project. It describes the governance bodies, relevant meetings and reports, and the internal rules and procedures relating to or complementing the Grant Agreement and the Consortium Agreement and specifies the quality and risk management procedures.

This handbook is an important point of reference for all project partners and will be kept updated throughout the project.

The dissemination level of D6.1 is public (PU) and is meant primarily for (a) all members of the CulturalRoad project consortium, and (b) the European Commission (EC) services.

This document is intended to serve as an internal guideline and reference for all CulturalRoad beneficiaries and associate partners, especially the governance bodies such as the General Assembly (GA) and the Steering Committee (SC).

1.2 Relation to Project Documents

D6.1 is part of WP 6 Project Management and will be complemented by future related deliverables, namely: D6.2 Innovation plan and process, D6.3 Final Innovation Plan and D6.4 Ethics & Data Management Plan

This handbook has no legal authority and it is only for guidance. The Grant Agreement and the Consortium Agreement are the primary legal documents that govern the project and take precedence over this handbook.

The **Grant Agreement (Project 101147397)** is a contractual arrangement between the European Commission and the beneficiaries receiving funding. It outlines the rights and obligations of the parties and specifies the conditions under which the project receives financial support.

Any deviations from the initial work plan described in the Grant Agreement must be promptly reported to the Work Package (WP) leader and the coordinator. In the event of substantial changes to the work plan described in the Grant Agreement or consortium composition during the project, partners may request amendments to the Grant Agreement. These requests should be carefully justified and submitted in adherence to the Horizon Europe program guidelines.

The **Consortium Agreement** is a legally binding document that outlines the terms and conditions governing the collaboration among the partners in a consortium (referred to as parties in the Consortium Agreement text). The EC is NOT party to the Consortium Agreement. Key elements described in the Consortium

Agreement include roles and responsibilities of each consortium partner, issues dealing with intellectual property rights, ownership of results generated during the project, payment processes, decision-making processes, confidentiality and data protection, liabilities, and more.

Where there are any inconsistencies between these documents, the following order of precedence should be applied:

1. EU Grant Agreement
2. Consortium Agreement
3. Project Handbook (present document)

1.3 Relationship to other projects deliverables

This deliverable is based on handbooks developed for other projects and includes influence from the Sinfonica, DeployEMDS, EVOROADS and MetaCCAZE projects. The Peer Review template is a modification of the approach ERTICO used in Sinfonica as Quality Manager.

2 PROJECT OVERVIEW

2.1 Project Concept

The aim of CulturalRoad is to leverage participatory planning to incorporate cultural and geographical diversity into more equitable Cooperative, Connected and Automated Mobility (CCAM) deployment strategies and increase societal acceptability across different regions in Europe and Worldwide as shown in Figure 1:

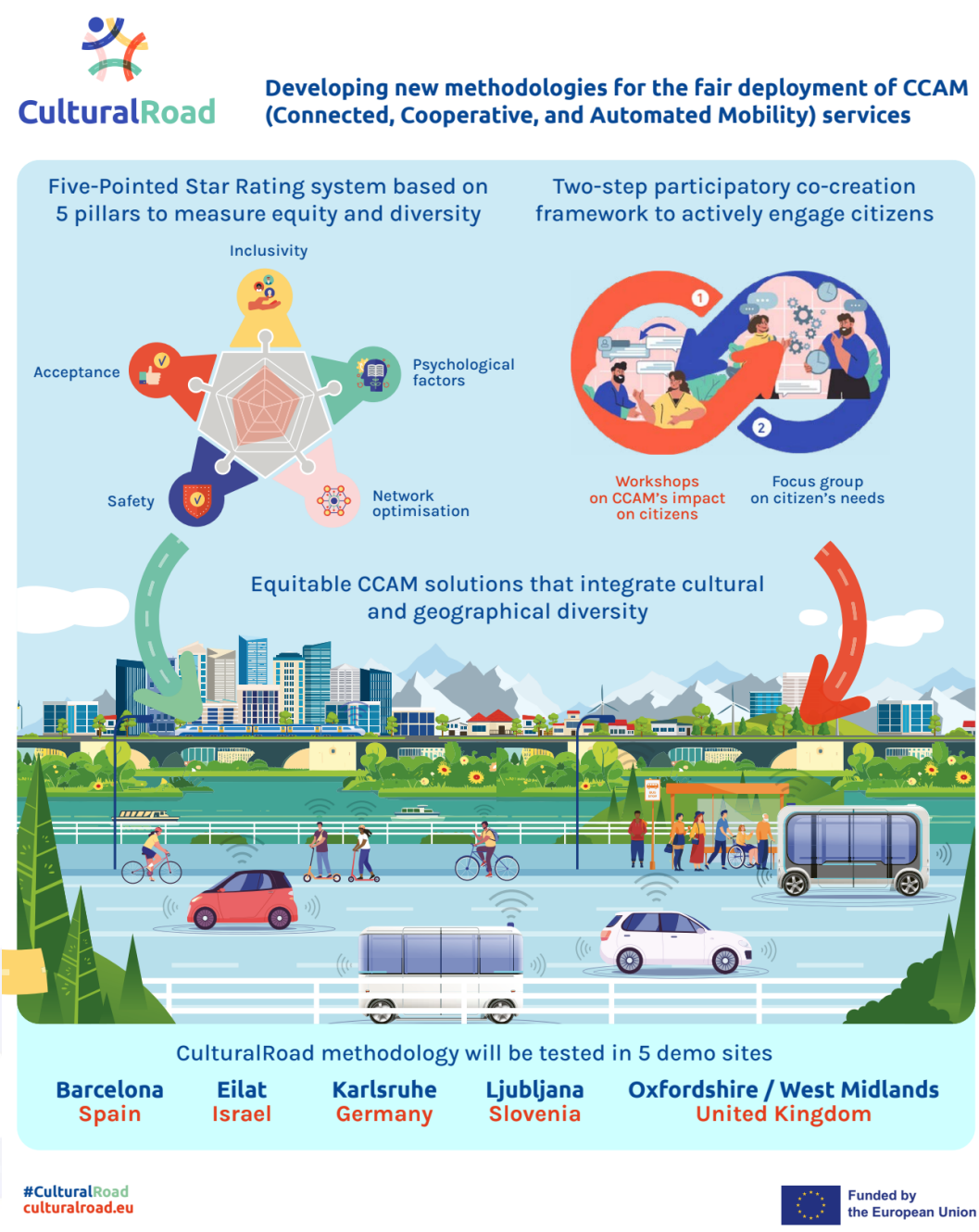

Figure 1: CulturalRoad Project Concept

2.2 Consortium

The CulturalRoad consortium consists of 18 partners as shown in Table 1. The Consortium includes representation of all the different stakeholders relevant to CCAM, including academic / research, private sector and public sector organisations, ensuring the project is inherently multidisciplinary in nature. Representation from ten different countries across Europe ensures that the consortium provides diverse experience and knowledge of the cultural factors relevant to CCAM.

#	Organisation full name	Short name	Type	Country
1	EUROPEAN ROAD TRANSPORT TELEMATICS IMPLEMENTATION COORDINATION ORGANISATION	ERTICO	Network	BE
2	DANMARKS TEKNISKE UNIVERSITET	DTU	Research	DK
3	TECHNISCHE UNIVERSITAET MUENCHEN	TUM	Research	DE
4	ETHNICON METSOVION POLYTECHNION	NTUA	Research	EL
5	UNIVERSITAT POLITÈCNICA DE CATALUNYA	UPC	Research	ES
6	FICOSA AUTOMOTIVE SL	FICOSA	Tech Provider	ES
7	INIT INNOVATIVE INFORMATIKANWENDUNGEN IN TRANSPORTVERKEHRS UND LEITSYSTEMEN GMBH	INIT	Tech Provider	DE
8	FUNDACIO CENTRE D'INNOVACIO I TECNOLOGIA DE LA UPC	UPC	Research	ES
9	AUTORITAT DEL TRANSPORT METROPOLITA	ATM	PT Operator	ES
10	ARRIVA PERSONENVERVOER NEDERLAND BV	ARRIVA	Tech Provider	NL
11	MUNICIPALITY OF EILAT	EILAT	Authority	IL
12	KARLSRUHER INSTITUT FUER TECHNOLOGIE	KIT	Research	DE
13	REGIONALNA RAZVOJNA AGENCIJA - LJUBLJANSKE URBANE REGIJE ZAVOD	RRA LUR	Authority	SI
Associated Partners				
14	DEPARTMENT FOR TRANSPORT	DFT	Authority	UK
15	INTERNATIONAL ROAD FEDERATION	IRF	Network	CH
16	LIFTANGO LTD	LIFT	Tech Provider	UK

17	WEST MIDLANDS COMBINED AUTHORITY	TfWM	Authority	UK
18	OXFORDSHIRE COUNTY COUNCIL	OCC	Authority	UK

Table 1: CulturalRoad Consortium

Partner 14, the UK Department for Transport participates as an Associated Partner, at their own cost. They will take part in WP3, supporting the UK Demonstration Pilot providing a national government perspective and in WP5 to support dissemination, communication and exploitation.

Partner 15, International Road Federation participates as an Associated Partner. Funding will be directly paid by the State Secretariat for Education, Research and Innovation (SERI) to the Swiss participant.

Partners 16,17, 18, respectively Liftango, West Midlands Combined Authority and Oxfordshire County Council participates as Associated Partners, funded under the UK Horizon Europe Guarantee and will not declare costs in EU Grants. Funding for these partners will be provided via the UK Government

2.3 Project Work Plan and Work Packages

CulturalRoad workplan will be executed over a three-year period (36 months), starting on 1st May 2024 (M1) and ending on 30 April 2026 (M36). The project is organized in 6 Work Packages (WPs), as shown in Table 2 and Figure 1.

WP#	WP Title	Leader	Month Start	Month End
1	Establishment of a cultural and geographical EU ecosystem	TUM	1	15
2	Five-Pointed Star Rating System of CCAM Geographical and Cultural Equity	UPC	6	30
3	Demonstration of the Two-Step Co-creation Framework	DTU	12	32
4	Transferability and Scalability	NTUA	24	36
5	Dissemination, Communication, Exploitation and Outreach	ERT	1	36
6	Project management	ERT	1	36

Table 2: CulturalRoad Work Packages

WP1 will consider the cultural, geographical, and exogenous diversity factors that significantly shape the planning, design, development, and implementation of CCAM solutions in Europe. A Two- Step co-creation framework for the equitable implementation of CCAM will also be developed.

WP2 will develop the new planning tools and a Five-Pointed Star Rating System to assess the level of equity of CCAM solutions based on five pillars: inclusivity, acceptability, network optimization, safety and

psychological factors. It will thus establish a holistic and complete methodology to assess how CCAM solutions contribute to mobility equity linked to geographical and cultural diversity, and then the set of appropriate KPIs to evaluate equity.

WP3 and WP4 are the key of the CulturalRoad Project. Within WP3, the five Demonstration Sites will implement the co-creation framework developed in WP1. Within WP4, we will assess the current scenario using the Five-Pointed Star Rating System and use the tools developed in WP2 to analyse new scenarios.

WP5 is responsible for ensuring dissemination of the outputs of CulturalRoad using the One-Up and One-Down approach. It is also responsible for developing all the promotional materials, managing transferability and establishing the International Peer Group.

WP6 ensures the project, administrative, technical, quality risk and innovation management of the project, as well as handling the reporting to the European Commission.

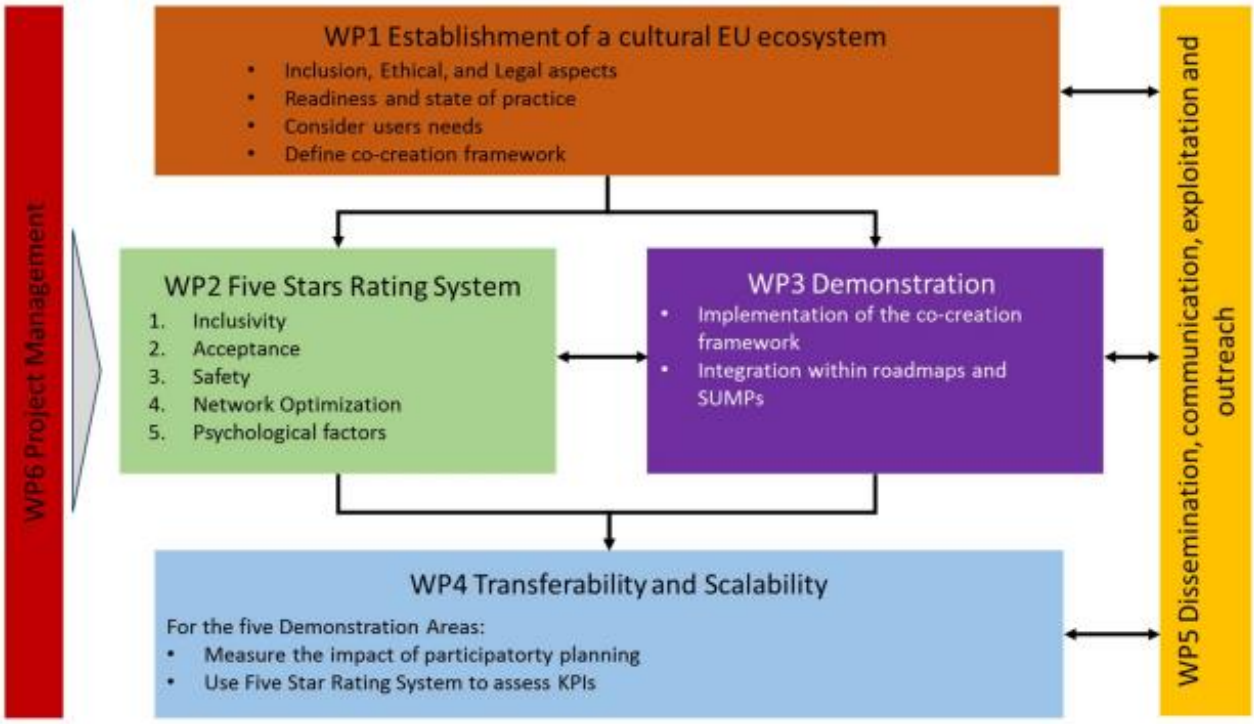

Figure 2: CulturalRoad workflow

2.4 Gantt Chart

The project's work plan is broken down into tasks and displayed against the project timeline in a Gantt chart as per the Grant Agreement (Figure 3). The horizontal coloured bars depict the duration of each task and show when the activity begins and ends. For each WP and task, milestones (Mx.x) and deliverables (Dx.x) are indicated in the month in which they are due respectively.

	WP name	Year 1												Year 2												Year 3											
		2024												2025												2026											2024
		May	June	July	Augu	Sept	Octo	Nov	Dec	Janu	Febr	Mar	Apri	May	June	July	Augu	Sept	Octo	Nov	Dec	Janu	Febr	Mar	Apri	May	June	July	Augu	Sept	Octo	Nov	Dec	Janu	Febr	Mar	Apri
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36
WP1	**Establishment of a cultural & geographical EU ecosystem**								M1.1				M1.2			M1.3																				
T1.1	Review of standards and existing pilots								D1.1																											
T1.2	Data requirements/blueprint for Demonstration Sites (Background data for WP3)													D1.2																						
T1.3	Insights on user needs (Background data for WP2)																																			
T1.4	Development of a two-step co-creation framework															D1.3																				
T1.5	Ethical and legal aspects of equity																																			
WP2	**Five-Pointed Star Rating System of CCAMs Geographical and Cultural Equity**												M2.1								M2.2							M2.3									
T2.1	Inclusivity and user acceptance pillars															D2.1																				
T2.2	Transport safety and network optimization pillars																																			
T2.3	Psychological factors pillar																																			
T2.4	Five-Pointed Star Rating System and KPIs																									D2.2					D2.3					
WP3	**Demonstration of the Two-Step Co-creation Framework**													M3.1						M3.2						M3.3							M3.4			
T3.1	Coordination and control																				D3.1												D3.2			
T3.2	Implementation of the Two-Step Co-creation Framework																																			
T3.3	Integration of the results from the participatory exercise into deployment plans																																			
WP4	**Transferability and Scalability**																										M4.1								M4.2		M4.3
T4.1	Psychological consequences of the co-cretion process on acceptance																														D4.1					
T4.2	Use simulation tools for future (post-project) scenario development																																			
T4.3	Use five stars system to evaluate Demonstration Areas																																D4.2			D4.3
WP5	**Dissemination, Communication, Exploitation and Outreach**			M5.1																						M5.2										M5.3
T5.1	Communication				D5.1									D5.3												D5.4										D5.6
T5.2	Knowledge transfer at a local and national level for each Demonstration Area																																			
T5.3	Replication and exploitation																																		D5.5	
T5.4	Networking and Capacity Building																																			
WP6	**Project management**	M6.1																		M6.2																M6.3
T6.1	Project, Quality and Risk Management						D6.1																													
T6.2	Technical Management																																			
T6.3	Innovation Management							D6.2																									D6.3			
T6.4	Ethics and Data Management									D6.4																										

Figure 3: CulturalRoad Gantt Chart

2.5 Deliverables

The project has planned for 21 deliverables, in order to capture all project activities and progress. The List of deliverables along with their dissemination level are depicted in **Table 3**Table 3: Cultural Road Deliverables. Each Deliverable is subject to the preparation and review process presented in subsection 4.1

D#	Deliverable Name	WP	Leader	Type	Diss. Level	M
D1.1	Report on CCAM readiness	1	TUM	R	PU	8
D1.2	Opportunistic Data Set	1	ERTICO	R	SEN	13
D1.3	Survey, experiments and the survey data in each city	1	DTU	R	SEN	15
D2.1	Mid-term methodological report	2	UPC	R	SEN	15
D2.2	Methodological report	2	UPC	R	SEN	25
D2.3	Final report on the Five-Pointed Star Rating System	2	UPC	R	PU	30
D3.1	Initial Pilot assessment	3	DTU	R	PU	20
D3.2	Final Pilot assessment and lessons learnt	3	DTU	R	PU	32
D4.1	Survey data in each city	4	DTU	R	PU	30
D4.2	Five-Pointed Star Evaluation of Demonstration Sites & Scenario development	4	TUM	R	PU	34
D4.3	Planning & Cultural Context Geographical tools	4	TUM	DEC	PU	36
D5.1	Communication and dissemination strategy	5	ERTICO	R	PU	4
D5.2	Preliminary Exploitation Plan	5	ERTICO	R	PU	15
D5.3	Year 1 Dissemination report	5	ERTICO	R	PU	13
D5.4	Year 2 Dissemination report	5	ERTICO	R	PU	25

D5.5	Final Exploitation Plan and business model	5	IRF	R	SEN	35
D5.6	Year 3 Dissemination report	5	ERTICO	R	PU	36
D6.1	Project Management Handbook	6	ERTICO	R	PU	4
D6.2	Innovation plan and process	6	CARNET	R	PU	7
D6.3	Final Innovation Plan	6	CARNET	R	SEN	33
D6.4	Ethics & Data Management Plan	6	ERTICO	R	SEN	6

Table 3: Cultural Road Deliverables

2.6 Milestones

CulturalRoad has 19 milestones denoted as Mx.x in **Table 4** below and the GANTT chart (**Figure 3**) above. Each major milestone consists of intermediate milestones, serving as verification and monitoring of the major milestones.

M#	Milestone Name	WP	Leader	Means of verification	M
1	M1.1. CCAM standards target group delineation, surveys and experiment formation complete	1	TUM	Survey ready to be disseminated among respondents	8
2	M1.2 Availability of all the required data in filtered and processed form	1	TUM	All the required data in hand	12
3	M1.3 Co-creation methodology ready	1	TUM	Finalised ethical and legal aspects of equity and Two-Step co creation framework ready	15
4	M2.1 First version of individual methodologies ready	2	UPC	Presentations and explanations between WP2 members. Shared report with the descriptions	12
5	M2.2 Individual methodologies tested and KPIs for each pillar defined	2	UPC	Presentations & explanations between WP2 members. Shared reports/results	20
6	M2.3 Refined Five-Pointed Star Rating System	2	UPC	Presentations and explanations between WP2 members. Shared report with methodological	27

				improvements	
7	M3.1 Target groups identified	3	DTU	List of target groups is generated after workshops with the stakeholders	13
8	M3.2 First step of participatory planning completed	3	DTU	Outputs from participatory planning workshop available	19
9	M3.3 Second step of participatory planning completed	3	DTU	Outputs from participatory planning workshop available	25
10	M3.4 Demonstration Site incorporated stakeholder cultural needs into CCAM strategies and plans	3	DTU	Outputs such as Roadmap, White Paper, Business Models, Development Plans, Business Model Canvas	32
11	M4.1 Travel survey	4	NTUA	Survey ready to be disseminated among respondents	26
12	M4.2 Pilot functionality, impact assessment and cultural diversity measured in Europe	4	NTUA	Pilots are fully and successfully measured in all aspects of the Five-Pointed Star System	34
13	M4.3 CCAM related planning and map tools available on CulturalRoad website	4	NTUA	Planning tools incorporating cultural diversity recommendations for SUMPs, NUMPs	36
14	M5.1 Project website	5	ERTICO	Website available	3
15	M5.2 Demonstration Sites webinars	5	ERTICO	Publicity from webinars	25
16	M5.3 Final Event	5	ERTICO	Publicity from event	36
17	M6.1 Kick-off Meeting (KoM)	6	ERTICO	Minutes of Meeting	1
18	M6.2 Review of reporting period 1	6	ERTICO	Periodic 1 Review Report	19
19	M6.3 Review of reporting period 2	6	ERTICO	Periodic 2 Review Report	36

Table 4**:** List of CulturalRoad Milestones

Six weeks before the Milestone Deadline, the Coordinator and the Technical Coordinator will verify if the Milestone is ready to be met with the Milestone Leader:

- If the milestone is to be met, no action needs to take place

If there is a risk of milestone delivery, the Risk and Quality protocols will be followed (described in the Chapter 4 of this Deliverable).

3 PROJECT COORDINATION

3.1 Management Structure Functions

The organisational structure of the consortium shall comprise the following Consortium Bodies:

3.1.1 General Assembly

The General Assembly is the decision-making body of the consortium. It shall consist of one representative of each Party who is deemed to be duly authorised to deliberate, negotiate and decide on all matters listed in Section 6.3.7 of the Consortium Agreement including:

- Content, finances and intellectual property rights –
- Changes to the Consortium Agreement
- Changes to the consortium (addition of partners or withdrawal)
- Proposal to the Granting Authority for a change of the Coordinator –
- Proposal to the Granting Authority for suspension of all or part of the project –
- Dealing with breaches, defaults
- Termination of a Defaulting Party's participation in the consortium and related measures

The Coordinator will chair all meetings of the General Assembly, unless decided otherwise by the General Assembly. The Consortium has agreed to abide by all decisions of the General Assembly taken in accordance with its jurisdiction, the Grant Agreement and the Consortium Agreement Decision making.

Associate Partners are limited in decisions and not allowed to vote on matters related to the EC Grant Agreement.

3.1.2 The Coordinator

The Coordinator is the legal entity acting as the intermediary between the Partners and the Granting Authority. The Coordinator shall, in addition to its responsibilities as a Partner, perform the tasks assigned to it as described in the Grant Agreement and the Consortium Agreement. In particular, the Coordinator shall be responsible for: -

- monitoring compliance by the Partners with their obligations under this Consortium Agreement and the Grant Agreement –
- keeping the address list of Members and other contact persons updated and available
- collecting, reviewing to verify consistency and submitting reports, other deliverables (including financial statements and related certification) and specific requested documents to the Granting Authority

- preparing the meetings, proposing decisions and preparing the agenda of General Assembly meetings, chairing the meetings, preparing the minutes of the meetings and monitoring the implementation of decisions taken at meetings
- transmitting promptly documents and information connected with the Project to any other Party concerned
- administering the financial contribution of the Granting Authority and fulfilling the financial tasks described in Section 7.2 of the Grant Agreement

3.1.3 The Steering Committee

The Steering Committee is the technical body responsible to monitor and manage the project execution. It is composed by the persons in charge of the following key positions:

1. Coordinator: (ERTICO).
2. Technical Coordinator (WP6): (DTU).
3. Quality and Risk Manager (WP6): (DTU).
4. Ethics and Data Management Manager (WP6): (ERTICO).
5. Innovation Manager (WP6): (CIT-UPC / CARNET).
6. Work Package Leaders (WPs 1 to 5 respectively): TUM, UPC, DTU, NTUA, ERTICO

3.1.4 Consortium Meetings

Consortium Meetings have been scheduled for the last Thursday of each month. They will take place online (via Teams), with agenda issued to the prior meeting, typically including:

- Work Package Updates
- Living Lab Updates
- Risks
- Any other Business

Minutes will be produced by the Coordinator, actions recorded in the minutes and in an action tracker (both stored in the project SharePoint). Two in-person General Assemblies and an in-person Final Meeting will also be arranged during the project.

When a decision needs to be made, these will be organised as General Assembly Meetings and subject to these rules.

3.1.5 Work Package Meetings

Work Package Leaders will be responsible for organizing their Work Package meetings, these will be typically monthly while the Work Package is live.

Additional meetings will be held as required for individual tasks / deliverables.

3.1.6 Shabbat

All Partners are asked to note that EILAT observe the Shabbat and do not work Fridays. Meeting should not be arranged for this day involving EILAT.

3.2 Project Communications

3.2.1 Sharepoint

A Sharepoint repository has been set up at: https://erticobe.sharepoint.com/sites/ID_CultureRoad

(note: the address is CultureRoad not CulturalRoad and reflects an initial version of the project name during the proposal phase).

This allows the storage and sharing of key documents and deliverables with all partners within the Consortium in a secure and backed up manner. It also allows simultaneous collaboration. The Coordinator has already provided access to the Sharepoint for individual users and is able to provide access for future users.

3.2.2 Email lists

To ensure that the Consortium receives relevant information in a timely manner without excessive email use, The project communication strategy reflects the project's structure and target the smallest possible group of members either using the mail distributor or direct email.

Communication relating to administrative matters (financial statements, signature of contracts, payments, etc.) will be targeted to the administrative staff of each organization, which is not necessarily involved in the execution of project activities. To make sure that the information reaches all the staff involved in the administrative management of the project, the communication will be distributed to the main contact persons as well.

Communication relating to legal matters (discussions on contracts) will be targeted to the legal staff of each organization, which is not necessarily involved in the execution of project activities. To make sure that the information reaches all the staff involved in the administrative management of the project, the communication will be distributed to the main contact persons as well.

To ensure the correct persons are addressed when the Coordinator needs to communicate on administrative or legal matters with the whole Consortium, the main contact persons to be used are updated from the EC participant portal. Therefore, in order not to miss any important administrative or legal information, each partner has the responsibility to keep the contacts up to date online and by informing the Coordinator.

The mail distribution server uses Sympa which is widely used in Research and Innovation contexts. The server contains the following lists as shown in **Table 5**:

Address[2]	Purpose	Visibility	Subscription
main_contacts	Contains the main contacts to address for topics related to the action itself. Sending is limited to the subscribers.	concealed	Request the Coordinator (automatically includes participants in WP1 -6 WP 6 mailing lists)
Internal_hotline	Allow project partners to contact the Coordinator	concealed	Request the Coordinator
external_hotline	Generic email used to allow contact to the Coordinator without releasing personal emails. (Also used as a point of contact for the website)	concealed	Request the Coordinator
wp1, wp2, wp3, wp4, wp5, wp6	Lists dedicated to the work within the Work Packages. Contains all the persons active in those WPs. These lists are the main entry for persons who are joining the work of the consortium. They can request to become a subscriber on the list server, if they do, a request for approval is sent to the associated WP leader, the PC, and the STI Manager. Sending is limited to the subscribers.	visible	Open subscription, approved by the Coordinator

Table 5: Mailing Lists

Note: Visibility indicates whether the list is shown on the Sympa mail server for subscription. The web address of the server has been excluded from this document to minimise the risk of spam as it will be made available publicly.

This is an initial set of mailing lists which can be expanded if the need arises.

A copy of all emails is saved on the Sympa Server which allows a record of project communications to be kept. All partners have been informed that this is the case.

Limitations

To prevent the server from being marked a spam source, emails must be sent from an address within the mail server's domain, requiring the original "From" address to be overridden. A side effect of this is that meeting requests using Exchange based sources cannot be transferred because the From address, does not match the organizer anymore. To circumvent the issue, the meetings can be circulated as an attachment, organised via Teams, or through direct email communication to each recipient.

Emails are limited to 5mb. However, this is not a problem, as the aim is for attachments to be shared using the SharePoint repository.

3.2.3 External website

The project website is located at: https://www.culturalroad.eu/

The website is organised as follows:

- Home page: short overview of the project, five pillars of transport equity, latest news, rotating carousel with the project partners
- About: overview of the project, facts and figures, objectives, methodology, consortium
- Demo sites: map and overview of the five demonstration sites. A subpage for each demo site has been developed with more details on the context, objectives and expected outcomes of the demonstration
- Resources: repository of deliverables, publications, promotional materials, and media that can be downloaded
- News & Events: list of news and events related to the project, newsletter
- Contact us: contact details and form

3.2.4 Newsletter

A newsletter will be sent out by CulturalRoad twice a year to a database of subscribers who actively signed up to receive it using a dedicated form available on the project website, ensuring compliance with GDPR. The newsletter will feature news about the project, events organised by CulturalRoad or in which the project will be presented, and other interesting developments. The newsletter will be available on the project website under 'News & Events'.

4 MANAGEMENT APPROACH

4.1 Production of Deliverables

CulturalRoad consist of 21 deliverables, all of which are reports, except for one (D4.3) which is an online tool.

It is essential that Deliverables are of high quality and meets the requirements set out in the Grant Agreement. They also form a record of the work, research undertaken in the project and form one of the pathways to impact for the project.

4.1.1 Deliverable Format

All CulturalRoad documentation (deliverables, minutes, posters, etc.) must be provided in the templates specifically developed for the project, which are stored on the SharePoint portal.

4.1.2 Guidance on Deliverables

Each deliverable will have the necessary content and structure according to its specific objectives. In any case, the following checklist to ensure the quality of deliverables is provided:

- **Abbreviations and terminology** are correctly listed in Glossary and defined the first time used in a document.
- **According to CulturalRoad brand guidelines:** use the template and styles
- **Conclusions** should be clear and based on the previous sections.
- **Disclaimer:** include the appropriate EC funding disclaimer
- **Executive summary** should be short, and provide a summary of the deliverable, conclusions
- **Figures and tables** should be properly referenced using Word “References” commands. Captions should be underneath
- **Inclusive:** like the project aims, CulturalRoad outputs should be inclusive. Ensure terminology is sensitive and appropriate to all groups, consider issues such as colour blindness and the size / quality of figures and diagrams. Terminology should be gender neutral unless there is a need to refer to a specific gender. Inclusivity should be considered in creating data. Websites should consider the WAI guidelines
- **Language:** in British English**,** according to EC Style Guide and where possible Plain English should be used. Where technical language and concepts are presented, care should be taken to present these as simply as possible.
- **References** to other research or sources of data are correctly cited according to the template format
- **Structure:** the deliverable is organised into clear chapters and sub-chapters

For Sensitive (SEN) deliverables, either an executive summary or an abridged version containing no commercially sensitive information must be produced for inclusion on the CulturalRoad Website

4.1.3 Deliverable Naming

The consortium partners will ensure that the document referencing is detailed and consistent. To this end, the following format will be used:

DX.Y_title_v0.x

or

DX.Y_title_v1.x,,

Where:

- **X.Y**: figures, e.g., Deliverable D.2.1.
- **title:** free text white spaces but can be shortened in the file name if the official title is a long one.
- **v0.x:** version prior to submission (if there are more than 9 versions it continues to v0.10, v0.11, etc.)
- **v1.x**: version post final submission by the Coordinator. Changes after submission become v1.1, v1.2, etc. In the event of a re-submission to the EC, it becomes v2.0.

4.1.4 Peer Review Process

For each deliverable, there will be a peer review involving the following:

- **Two Peer Reviewers**: not involved in the creation of the deliverable. Peer Reviewers have been chosen to balance the review effort in relation to overall budget. Where a deliverable is a dependency for a future task, the WP or Task leader of the future task have been included as Peer Reviewers.
- **Quality Reviewer**: Either the Technical Coordinator or the Coordinator (if the Technical Coordinator is leading the deliverable)

Initial assignments of Peer Reviewers and Quality Reviewers are as follows in Table 6:

D#	Deliverable Name	WP	Leader	Peer Reviewer 1	Peer Reviewer 2	Quality Reviewer
D1.1	Report on CCAM readiness	1	TUM	Arriva	EILAT	ERTICO
D1.2	Opportunistic Data Set	1	ERTICO	NTUA	KIT	DTU
D1.3	Survey, experiments and the survey data in each city	1	DTU	INIT	CARNET	ERTICO
D2.1	Mid-term methodological report	2	UPC	NTUA	OCC	ERTICO
D2.2	Methodological report	2	UPC	Arriva	TfWM	ERTICO
D2.3	Final report on the Five-Pointed Star Rating System	2	UPC	LIFT	RRA LUR	ERTICO
D3.1	Initial Pilot assessment	3	DTU	NTUA	TUM	ERTICO
D3.2	Final Pilot assessment and lessons learnt	3	DTU	NTUA	TUM	ERTICO
D4.1	Survey data in each city	4	DTU	Arriva	Liftnago	ERTICO
D4.2	Five-Pointed Star Evaluation of Demonstration Sites & Scenario development	4	TUM	ATM	INIT	ERTICO
D4.3	Planning & Cultural Context Geographical tools	4	TUM	TFWM	IRF	ERTICO
D5.1	Communication and dissemination strategy	5	ERTICO	Arriva	LIFT	DTU
D5.2	Preliminary Exploitation Plan	5	ERTICO	ATM	UPC	DTU
D5.3	Year 1 Dissemination report	5	ERTICO	TUM	UPC	DTU
D5.4	Year 2 Dissemination report	5	ERTICO	OCC	INIT	DTU
D5.5	Final Exploitation Plan and business model	5	IRF	FICOSA	KIT	ERTICO
D5.6	Year 3 Dissemination report	5	ERTICO	RRA LUR	EILAT	DTU
D6.1	Project Management Handbook	6	ERTICO	UPC	TfWM	DTU
D6.2	Innovation plan and process	6	CARNET	FICOSA	DFT	ERTICO
D6.3	Final Innovation Plan	6	CARNET	TUM	UPC	ERTICO
D6.4	Ethics & Data Management Plan	6	ERTICO	IRF	UPC	DTU

Table 6: List of Deliverables and Reviewers (all deliverables are reports with the exception of D4.3)

The timeline for Peer Review is as shown in Figure 4:

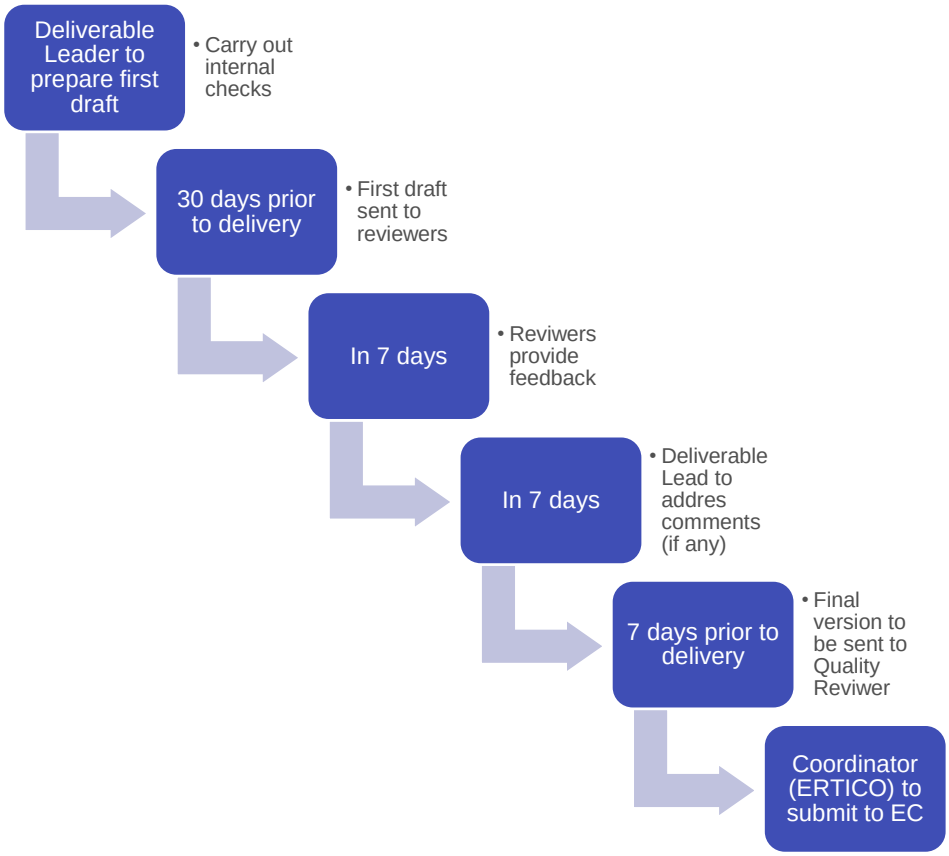

Figure 4: Timeline for Peer Review

- **One month before a deliverable is due:** The Quality Manager liaises with the Deliverable Lead Author and the Peer Reviewers to confirm the process / timings and to confirm Peer Reviewers are available (including the ability to substitute Peer Reviewers if needed following the same rules as initial picks)
- **Two weeks before deadline:** the author sends the draft deliverable and the Peer Review form (see Annex 1) to the appointed reviewers. The Coordinator, Technical Coordinator, Quality Manager, and the WP leader also receive the draft for information. The experts start reviewing.

  One week before deadline: each reviewer returns the filled Peer Review Form and comments on the deliverable to the author, copied to the Technical Coordinator, the Quality Manager, and the WP leader. The comments are written directly in the draft Word file, using track changes mode and also summarised in the separate Peer Review Form. For ease of review, it is recommended that all comments are stored in the same Word file on SharePoint. The author (and co-author where required) improves the draft, considering the reviewers' remarks and produces a final draft version which is sent to the Coordinator, the Technical Coordinator, the Quality Manager, and the WP leader.
- **Prior to the deadline**: The Quality Reviewer then conducts a final review of the deliverable before the Coordinator submits the deliverable to the European Commission.

Specific deliverable quality criteria are provided in the peer review form, in annex to this deliverable.

4.2 Risk

All partners in the project are obliged to monitor risk and inform either the relevant Work Package leader(s), the Technical Coordinator and the Coordinator. The aim is to capture risks early and to deploy appropriate mitigation measures before they either become live issues or escalate.

The monthly General Assembly meetings will include a standing item on risk and allow any partner to identify any risk (that is a possibility of happening) or issue (that is live). Risk will also be captured as Reporting (see Section 4.3).

Risks will be categorised as follows:

- Risk description
- Categorisation (likelihood /severity)
- Associated Work Package (owner)
- Proposed risk-mitigation measures

The importance of risks will be assessed on a risk Likelihood / Severity scale on a Risk Matrix to give an overall risk value as shown in Figure 3.

Likelihood	**High Probability**	Medium	High	High
	Medium Probability	Low	Medium	High
	Low Probability	Low	Low	Medium
		Low Impact	**Medium Impact**	**High impact**
	Severity			

Figure 5: Risk Matrix

The Technical Coordinator and the Coordinator in conjunction with WP Leaders and affected Partner(s) have the responsibility to, together with the risk identifying Partner, assess the impact, probability of occurrence and remedial actions. Risks should be addressed as soon as possible.

For risks with a High overall Score, the Steering Committee will decide how the risk shall be addressed including any related actions and decisions, where needed. All risks reaching this level shall be reported to the European Commission.

An initial Risk Assessment has been completed as part of the proposal. This has been slightly updated and is shown in **Table 7** below:

Description of risk (likelihood /severity)	WP (s)	Proposed risk-mitigation measures
Citizens are not willing to accept CCAM (Medium, Medium)	WP1,2,3	Shift the focus of the pilot to why users are not willing to use this service and whether this is a problem at a local level or at a European level. *Note: Although some citizens / groups not willing to accept CCAM would be a finding in itself and we would adjust the Rating System so that the main reasons of unwillingness are clearly covered.*
Poor engagement with target stakeholder groups (Low, Medium)	WP1,2,3	Develop stakeholder management plan: Identify target stakeholders early, utilise existing relationships in Demonstration Sites and Worldwide
Data and results may not be representative of the entire population (Medium, Low)	WP1-4	Target groups will be identified within the workshops to avoid under-representing certain segments of the population. However, it is noted that CCAMs / Demonstration Pilots may focus on certain target segments and the priority will be to ensure these segments are well represented.
Lack of data to inform pillars in in each Demonstration Pilot	WP1-4	Early planning of data needs taking place in WP1. Each Demonstration Pilot to confirm the types, scale of data (including any restrictions on use).
Database insufficient to assess any part of any Equity pillar (Medium, Medium)	WP2	Conduct an analysis of the necessary data well in advance. Choose the most complete starting database possible. Plan time and budget to collect extra data if necessary.
Delay in the definition of a methodology in a particular pillar (Low, Medium)	WP2, WP3, WP4	Implementation of measures for the continuous assessment of the progress. Re-scheduling of next tasks in advance if necessary. Pillars methodologies are designed to be independent.
Disfunction of a pillar methodology when tested (Low, Medium)	WP2, WP3, WP4	Feedback loops from other WPs with time allowances to allow necessary adjustments without affecting the following WPs of the project. Continuous communication among partners involved in the developing the Five-Pointed Star Rating System.
Lack of maturity / understanding of CCAM limit involvement of key stakeholders (Medium, Medium)	WP1-4	Dedicated task T5.4 to provide training and capacity building, led by ERT who has extensive experience, established approaches.

Lack of participation by third party stakeholders limits replication (Low, Medium)	WP5	Consortium (especially ERT and IRF) have proven experience, network and track record in stakeholder management. A plan of clustering and networking activities, using appropriate channels will be developed and monitored on an ongoing basis.
Poor performance by partner affects project deliver (Low, High)	WP6	Regular calls with the TMT in T6.2 will monitor progress and identify issues early so action can be taken as appropriate.
Data handling risks privacy or ethical issues (Low, High)	WP6	Dedicated Task T6.4 to constantly monitor and manage this and establish legal and ethical procedures including controlled access and data handling / cyber security measures.

Table 7: Risk Register

4.3 Reporting

The aim of reporting within CulturalRoad is to ensure that Project activities are on course and all beneficiaries are contributing as expected. If activities are not on course, then the Coordinator (in conjunction with the Steering Committee) can take action such as:

- updating the Project Plan, including the reorganisation of resources.
- taking correcting actions (including reallocation of budget from poor performing partners)
- Informing the EC project officer and considering whether an amendment is required.

The Coordinator will monitor progress through Internal and Formal (EC) reporting:

4.3.1 Internal Reporting

The aim of internal reporting is to provide a mechanism for the quick review of progress and identification of issues, linked to the

General Assembly

The General Assembly meetings provide an opportunity for each Work Package leader to review progress and discuss issues such as risk and financials.

Quarterly Reports

On a quarterly basis (every three months), the Coordinator will request via email an informal update from each partner, asking the following topics:

- Are you on track with spendings?
- Are you on track with progress?
- Any risks you are aware of?
- Are any amendment(s) likely to be needed?

Six Month Reporting

Every six months about the progress of the work, the Coordinator will also request instead of a quarterly report, a short-written report from all Project partners (EC funded and Associated partners). This will document:

- Work performed during that period and achievements made,
- Any risks specific to partner(s), and
- An overview of the resources spent (staff effort and any additional costs compared to forecast).

Reports will note any deviations. The internal reports will be based on the official periodic reporting requirements and such allow easy incorporation into EC period reports. WP Leaders will collect input from Task Leaders and other beneficiaries and report the progress made in the provided template. The contribution of all beneficiaries involved in the WP will be briefly summarized.

4.3.2 Formal (EC) Reporting

Article 21 of the Grant Agreement requires the Coordinator and Beneficiaries to continuously report on the progress of the action (e.g. deliverables, milestones, outputs/outcomes, critical risks, indicators, etc; if any), in the ECAS Portal

Work Package Leaders will work closely with Task Leaders to produce complete records of their activities and achievements towards objectives as well as the contribution of all the partners involved, as required by the Grant Agreement. These reports will also serve to justify Person Month (PM) costs reported by the beneficiaries. The reports will be sent to the Coordinator for submission to the EC.

Two periodic reports will be produced by the Coordinator incorporating inputs from each partner:

1. Covering Months 1 to 18, required before 60 days before end of reporting period and resulting in Interim payment 90 days from receiving periodic report
2. Covering Months 19 to 36, required before 60 days after end of reporting period and resulting in Final payment 90 days from receiving periodic report

The periodic report consists of the following elements:

- Online report **Part A,** based on:
  - information from continuous reporting completed in the EU Funding & Tenders Portal
  - Financial Statements, which are cost claims submitted by each project partner in the Funding and Tenders portal
- Technical report Part B, comprises providing:
  - a detailed narrative of work completed for each WP during the reporting period. Part B is uploaded as a PDF document into the portal. The level of detail is high (task-level)
  - an explanation on deviations from the Grant Agreement, their possible consequences, and proposed corrective actions
  - an explanation on delays and critical objectives, deliverables or milestones that have not been fully achieved
  - an explanation of the use of the resources including any deviations, and their possible consequences

4.4 Record Keeping

All Partners must keep records and other supporting documents to prove the proper implementation of the action:

- for actual costs: adequate records and supporting documents to prove the costs declared (such as contracts, subcontracts, invoices and accounting records);
- Time sheet or similar supporting documents

All partners should maintain records for five years after final payment.

4.5 Confidentiality

Standard period for maintaining confidentiality is for five years after final payment.

5 CONCLUSIONS

This Project Handbook outlines the key information for the CulturalRoad project, namely:

- The project overview: key aims, structure of tasks and work packages, milestones and deliverables
- How the project will be managed including the role of the Coordinator, Steering Committee and how they interact in meetings
- Project communication tools (SharePoint, Emails and Website)
- Approach to production of deliverables including the Peer Review Process and Peer Review Form and essential requirements for deliverables
- How risk is managed, including mitigations around delay and not meeting project objectives
- The approach to reporting and record keeping

This document is a living document and will be update as necessary, reflecting a continuous approach to project monitoring. It will also be supplemented by separate deliverables D6.2: Innovation plan and process, D6.3 Final Innovation Plan and D6.4 Ethics & Data Management Plan

ANNEX 1: PEER REVIEW TEMPLATE

Peer Review Report for [deliverable name]

Work Package: WPx, Task X.x

TITLE	
DELIVERABLE MAIN AUTHOR/EDITOR	
DISSEMINATION LEVEL	SEN / PU
STATUS	
DUE DATE	xx/xx/20xx
DOCUMENT DATE	xx/x/xx
VERSION NUMBER	Vx.x

Deliverable Review Process

The CulturalRoad Consortium uses the Deliverable Review Process for its internal quality assurance for deliverables to assure consistency and high standard for documented project results. The Review is done individually by selected reviewers. The main author (editor) of the document is responsible toto collect the comments and suggestions from the reviewers and decide which changes to the document and actions are to be undertaken, and also provide feedback to the reviewers (especially in case of disagreement or querying any of the recommendations).

Reviewer: [Name]

Overall Review Result

Deliverable is:

☐Fully accepted	☐ Accepted subject to minor changes proposed (provide changes in deliverable in track mode)	☐ Rejected unless modified as suggested	☐ Fully rejected

Suggested action to the authors

Refer to commented version of the deliverable,

Specify missing chapters / subjects (if any)

Reviewer comment:

Author response (if relevant):

Peer Review Report for [deliverable name]

Work Package: WPx, Task X.x

Other changes to the deliverable essence and contents

Reviewer comment:

None

Author response (if relevant):

Relevance

Is this deliverable relevant to the project and to the particular WP activities it covers?

Reviewer comment:

Author response (if relevant):

Soundness of methodology

Are the results arbitrary or based upon a clear methodology, involving users' tests, expert opinions, etc.?

Reviewer comment:

Author response (if relevant):

Quality of achievements

Please comment on the essence of the results. "Are they of high value? Are they what one should expect?"

Reviewer comment:

Author response (if relevant):

Peer Review Report for [deliverable name]

Work Package: WPx, Task X.x

Quality of presentation of achievements

Are the results adequately explained and commented or just mentioned? Is there a link between methodology and results?

Is there an Executive Summary that is informative and understandable if read as a stand-alone document (without referring to chapters in the rest of the deliverable)? – this is particularly important in the case of Sensitive deliverables, where a non-confidential Executive Summary will be made available publicly, but readers would not have access to the main report.

Do the conclusions summarise the main findings/achievements (not repeating the introduction)?

Reviewer comment:

Author response (if relevant):

Deliverable Layout / Spelling / Format

Is the chapter structure logical and readable? Is the language readable? Does it follow the CulturalRoad format?

Does it include at the beginning a table of contents, list of figures, list of tables, and a list of acronyms and abbreviations used?

Does it include at the end a references section (and annexes if relevant)?

Reviewer comment:

Author response (if relevant):