

D5.1 – Project Management Handbook

Project: Boosting innovation agencies for bioeconomy value chains

Acronym: BIO-Boost



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List of abbreviations

Abbreviation	Full name
CA	Consortium Agreement
PM	Project Manager
PO	Project Officer
WPL	Work Package Leader
GA	Grant Agreement
SC	Steering Committee
PMT	Project Management Team
AGA	Annotated Model Grant Agreement
TL	Task Leaders
PC	Project Coordinator
EC	European Commission



Executive Summary

This guide is a compilation of general guidelines and recommendations for helping you in the reporting of BIO-Boost project. The Project Management Handbook will be updated as the project progresses.

The rights and obligations to the European Innovation Council and SMEs Executive Agency (EISMEA) are established in the Grant Agreement.

The Grant Agreement (GA) is the contract between the Coordinator and Beneficiaries and the European Innovation Council and SMEs Executive Agency (EISMEA). This reference document sets out the rights and obligations and the terms and conditions applicable to the grant awarded to the beneficiaries for implementing BIO-Boost.

If you have further questions, please read the Annotated Model Grant Agreement (AGA). This document helps to understand and interpret the Grant Agreement.

https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/aga_en.pdf

The Consortium Agreement (CA) is the internal agreement between the partners of the consortium, and it regulates all the issues not covered by the Grant Agreement (governance structure, ownership of results, conflict resolution, etc.).

All legal documents will be available at the BIO-Boost workspace in Teams:

https://teams.microsoft.com/l/team/19%3aebqpcoyyAa2hBhonEL8cmJdqjHVSI_4XBdw_-eJKIH1%40thread.tacv2/conversations?groupId=6eef5042-6556-439e-9f80-e040abba9418&tenantId=1af3fc62-07a2-4b65-983b-076c237c6783

1. MANAGEMENT STRUCTURE

As a small project, BIO-Boost operates with a flexible, simple, and equitable management system, based on the following.

1.1 Steering committee

The Steering Committee (SC) consists of one representative per partner in the project (8 members in total), is chaired by the coordinator and is the ultimate decision-making body of the consortium dealing with all key strategic decisions. Its structure ensures that each partner is equally involved in the decision making. SC members are responsible for the on-time delivery of results on behalf of the partner they represent, the quality of the work, the monitoring of budgetary and technical issues, and the provision of input for internal and external reporting and documentation. The SC meets at least once annually, and ad hoc where needed.



1.2 Project Management Team

Management and supervision for the proper execution of the project, is carried out by the Project Management Team (PMT), which consists of a senior manager at FBCD, a financial controller, and access to FBCD legal experts if needed. The PMT coordinates and manages those items that affect the contractual terms with the EC, which will be fixed at the outset of the project, as well as the technical activities of the consortium. The mandate of the PMT is outlined but not limited to:

- accomplishment of project activities and targets within time schedule & budget constraints
- overall project planning and scheduling
- co-ordination of partners and organisation of project meetings
- internal (among partners) and external (to the EC) reporting, documentation, and financial management
- representation of the project and partnership to external stakeholders
- communication with the EC

1.3 Work Package Leaders and Task Leaders

The Work Package Leaders (WPL) will share the responsibility of coordinating the partners collaborating under their WP to ensure the quality of executed work. They will also be jointly responsible for resolving day-to-day administrative, technical and resource problems, and disseminating information relating to all aspects of the work to the other WPL ensuring smooth coordination among WPs.

Task Leaders (TL) are responsible for the on-time elaboration of the deliverables and results of their respective task. They work under the supervision of their respective WPL and report directly to them.

2. PROJECT COORDINATION

2.1 Internal communication

Communication between the PC and partners takes place with any available convenient way (e.g., e-mail, telephone, web conferencing, fax, meetings, etc.). Internal communication may be distinguished into formal and informal. The PC has the main responsibility of ensuring smooth and effective internal communication.

The contact details of BIO-Boost partners are kept in a separate file (BIOBoost contact list.xlsx). In the event of any change in the contact details or in the project team, partners should notify the PC, who will then inform the rest of the partners (and if necessary, the Commission). A mailing list for the project is implemented based on these details and updated by the PC and partners when needed.

Communication for important issues (e.g., sending deliverables, planning meetings, etc.), as well as any formal communication (e.g., project meetings, etc.) should be documented - written (e.g., by preparing the meeting minutes, maintaining an electronic (e.g., emails) or paper copy record, etc.).

Informal communication takes place between the PC, the WPL and the partners (through telephone, informal emails, etc.) and may not be documented. The PC and the WPL are expected to

communicate regularly with the project partners to follow closely the project and work packages' progress with a view to identifying and rectifying potential deviations in terms of time.

Close collaboration and communication between project partners are essential, especially in cases where they have to collaborate in order to perform specific tasks of the project.

2.2 External communication

2.2.1 Communication with the Commission

The PC is the sole responsible for the communication with the responsible Project Officer (PO) of the Commission with respect to the project. Project partners should not contact the PO. Only in exceptional cases, and if the PO requires so, may a project partner contact directly the PO. In such a case the PC is kept fully informed (in writing) about the content of the communication.

The PC has the responsibility of submitting to the Commission all reports and deliverables of the project. The PC also provides to the Commission any additional information and / or clarification (that have been requested by the Commission). Finally, the PC keeps all partners informed about any important communication with the Commission.

2.2.2 Communication with third parties

Project partners may and should communicate with third parties (e.g., producers, procurers, consumers, agri-food industry, retailers, public authorities, other EU-funded projects, etc.) within the context of the project.

In all external communications, a reference to the project should be made (e.g., project acronym, EU programme, GA No, etc.).

3. REPORTING IN BIO-BOOST PROJECT

In this chapter, we give a brief insight into the main budget points to facilitate your financial reporting. If you have doubts if a cost is eligible or not you must always check the Article 6 of the Grant Agreement.

3.1 Reporting Periods – Dates

BIO-Boost project is divided into two reporting periods:

Table 1: Reporting Periods

Reporting periods		
Periodic report 1	M1 – M12	01/02/2023 – 31/01/2024
Periodic report 2	M13 - M24	01/02/2024 – 31/01/2025

The coordinator must submit a periodic report within 60 days following the end of each reporting period, as well as a final report within 60 days following the end of the last reporting period. Therefore, coordinator need the financial statement from each partner the 20th day after

the end of a reporting period. The statement must be submitted through a webform to the coordinators Podio system.

3.2 Reports

These reports must include the following information:

Table 2: Report information

Reporting periods 1 and 2	
Technical report	Explanation of the work carried out by the beneficiaries Overview of the progress and explanation of deviations if any Summary for publication by EISMEA
Financial report	Individual Financial Statement for each beneficiary and linked third party (costs declared)
Final report	
Final technical report	Final technical report including a summary for publication (overview of the results and their dissemination and the conclusions on the action)
Final financial report	Final summary financial statement

4. OBLIGATIONS RELATED TO DISSEMINATION, COMMUNICATION AND EXPLOITATION ACTIVITIES

The Grant Agreement of the BIO-Boost project includes several obligations related to dissemination, communication, and exploitation activities. All the involved partners and third parties have to be aware of the requirements in terms of visibility of funding.

Hereby we present you a brief guide compiling these requirements. In case of any doubt, please do not hesitate to contact leader of work package 4 –Dissemination, Communication and Exploitation– (ICT) before publishing any information related to the BIO-Boost Project. ICT will do their best to answer your questions.

4.1 Required text to guarantee visibility of funding – OBLIGATORY.

Ownership of results and rights of use	Article 16
The granting authority does not obtain ownership of the results produced under the action. The granting authority has the right to use non-sensitive information relating to the action and materials and documents received from the beneficiaries (notably summaries for publication, deliverables, as well as any other material, such as pictures or audio-visual material, in paper or electronic form) for policy information, communication, dissemination and publicity purposes — during the action or afterwards. Specific rules regarding IPR, results and background are set out in Annex 5 and non-compliance with the obligations may lead to reduction of the grant and other measures.	
General obligation to maintain confidentiality	Article 13
During implementation of the action and for five years after the payment of the balance, parties must keep confidential any sensitive information and handle classified information. They must not disclose this information to any third parties without approval. Breach of these obligations may lead to grant reduction and other measures. Specific rules are outlined in Annex 5 in Grant Agreement.	
Promoting the action – visibility of EU funding	Article 17
<u>General obligation to promote the action and its results:</u> The beneficiaries must promote the action and its results by providing targeted information to multiple audiences (including the media and the public) in a strategic, coherent, and effective manner.	



Information on EU funding — Obligation and right to use the EU emblem:

Communication activities of the beneficiaries

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



**Funded by the
European Union**

The emblem must remain distinct and separate and cannot be modified by adding other visual marks, brands or text.

When displayed in association with other logos (e.g., of beneficiaries or sponsors), the emblem must be displayed at least as prominently and visibly as the other logos.

For the purposes of their obligations under this Article, the beneficiaries may use the emblem without first obtaining approval from the granting authority. This does not, however, give them the right to exclusive use. Moreover, they may not appropriate the emblem or any similar trademark or logo, either by registration or by any other means.

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4.2 Processing of personal data

Please refer to the Data Management Plan which is available at the BIO-Boost workspace in Teams:

[DMP_draft.docx](#)

4.3 Presentations of BIO-Boost

To ensure visual homogeneity of the presentations concerning BIO-Boost project, please prepare them with the template provided in Teams:

[Project templates](#)

4.4 BIO-Boost Social Networks

As a key factor for an effective dissemination, we have set up a Linked In profile:

<https://www.linkedin.com/company/project-bioboost/>

Please follow it from your organisation’s account (if you want to follow them from your personal account as well, it is welcome!).



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The BIO-Boost project has received funding from the European Union’s Horizon Europe coordination and support action under grant agreement No 101096150.

In order to fill them with relevant content, please, send any information related to the project to leader of work package 4 – Dissemination, Communication and Exploitation – (ICT), who will publish it. Examples of information we can feed our profile with:

- Any member attends any event relevant to BIO-Boost such as a congress, a conference, a workshop, a commercial fair, etc.
- Publishable updates of the project such as meetings within the consortium, on-site visits, etc.
- Relevant news even if they are not one of the actions of BIO-Boost, for example concerning improvements in national innovation framework etc.

For further information on the communication and dissemination activities please see the BIO-Boost Communication and Dissemination Plan which will be available on Teams by the end of July 2023.

5. WORK PACKAGES, MILESTONES AND DELIVERABLES

On the following pages:

- A graphical presentation of the work packages.
- A Gantt chart of the project is displayed showing work packages, tasks, milestones and deliverables on a timeline. It also shows which partner oversees work packages and tasks.

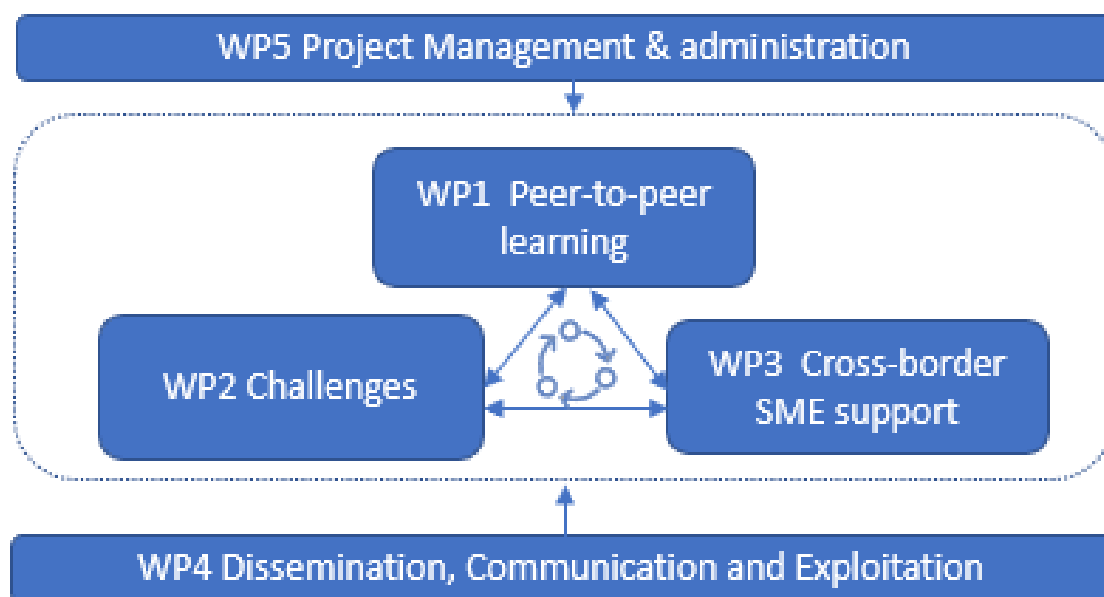


Figure 1: Graphical presentation of the work packages

Table 3: Gantt chart showing tasks, deliverables and milestones

Task name	Year 1										Year 2			
	M1	M2	M3	M4	M5	M6	M8	M10	M12	M15	M18	M21	M24	
WP1: Peer-to-peer learning														
Task 1.1 – Report on current state of innovation support and SWOT analysis			D1.1											
Task 1.2 - Joint workshops / study visits			M1.1											
Task 1.3 - Design Options Paper												D1.2		
Task 1.4 – Staff exchanges														
WP2: Challenges														
Task 2.1: Motivation of innovation support ecosystems / facilitators			D2.1											
Task 2.2: Challenges and opportunities gathering in innovation ecosystems														
Task 2.3: Organisation and implementation of hackathons					M2.1		M2.2							
Task 2.4. Matrix of innovation opportunities at regional level and across innovation ecosystems													D2.3	
Task 2.5: Evaluation of impact from challenges													D2.2	
WP3: Cross-border SME support														
Task 3.1: Recruitment and assessment of SME and start-ups		D3.1												
Task 3.2: Cross-border Key Account Management and support to SMEs			M3.1											
Task 3.3: Impact assessment													D3.2	
WP4: Dissemination, Communication and Exploitation														
Task 4.1: Plan for Dissemination, Exploitation and Communication (PDEC)						D4.1								
Task 4.2 Communication and dissemination activities			M4.1										D4.2	
Task 4.3: Research and innovation funding webinars and workshops														
Task 4.4 Replication guide for multiplication													D4.3	
Task 4.5 Exchange channel with authorities, policy makers														
WP6: Project management														
Task 5.1 Management and coordination			D5.1											
Task 5.2: Financial management and project reporting														
Task 5.3: Data management and ethics			D5.2											

5.1 Deliverables preparation guidelines

5.1.1 What is a milestone?

A milestone is a scheduled event relevant for the BIO-Boost project development. There is not a concrete task associated to a milestone, but it is the result of completed work.

5.1.2 What is a deliverable?

A deliverable is a document that summarizes all the work carried out within a specific project task. The deliverable has two objectives, on one hand it helps the rest of the consortium to better understand project progress and on the other hand it is the tool that EISMEA/the European Commission uses to assess project progress and its concordance with the approved planning. In addition to this, the public deliverables also serve a dissemination purpose.



5.1.3 What kind of information should I include in a deliverable?

Since all deliverables in BIO-Boost are public documents, it is important not to include any confidential or sensitive information in the reports. In particular, please avoid displaying personal data of any kind.

Make things easier for the evaluator and prepare a visual document, include pictures and infographic information to explain in few pages all the work carried out.

5.1.4 How and when should I start with deliverable preparation?

The deliverable preparation starts with the task planning. Firstly, you should read the description provided in the Grant Agreement, from there draft a schema and discuss with the WP leader. Execute the tasks to – at least - fulfil deliverable requirement.

The first draft (complete version of the document with some gaps) must be sent to the WP leader at least 4 weeks before deadline. Therefore, we advise you to start with deliverable preparation at least 2 months before due date. Please look at the list and dates of deliverables provided below. To ensure visual homogeneity, please prepare your deliverable using the template provided in Teams.

5.1.5 Who will review my document?

Internally → To ensure quality and coherence each deliverable will be reviewed by an internal reviewer (appointed partner who is not the WP leader, see table 5, where X marks the internal reviewer and the Mx refers to the deadline of the deliverable and responsible partner), the WPL AND by the project coordinator prior to its submission to EC.

The procedure is:

- The partner, WPL or TL, responsible for the deliverable will send the draft of the deliverable to WPL and internal reviewer to weeks before deadline.
- Internal reviewer will reply within 3 days to WPL or partner responsible for the deliverable.
- 1 week before deadline responsible partner sent final deliverable to PC.

It is highly important to send the deliverables on time so please be aware of the deadlines affecting your deliverables.

Externally → When assessing project progress, the European Commission will rely on the support of external experts. They will review all deliverables produced and, from there, they will decide if the project is meeting the objectives or not. Grant payment depends on this evaluation.

List of deliverables:

Table 4: List of deliverables

Deliverables						
Work Package No	Deliverable Related No	Deliverable Name	Lead Beneficiary	Type	Dissemination Level	Due Date
WP1	D1.1	Report on innovation ecosystems	NCBR	R	Public	30 Apr 2023
WP1	D1.2	Design option paper	NCBR	R	Public	31 Oct 2024
WP2	D2.1	Stakeholder map	UNIMOS	DEC	Public	30 Apr 2023
WP2	D2.2	Report and evaluation of impact from challenges	CLIC	R	Public	31 Jan 2025
WP2	D2.3	Matrix of innovation opportunities	CLIC	R	Public	31 Jan 2025
WP3	D3.1	Selection criteria for SME recruitment to the programme	LIC	R	Public	31 Mar 2023
WP3	D3.2	Report and evaluation of impact from cross-border KAM	CLIC	R	Public	31 Jan 2025
WP4	D4.1	Plan for Dissemination, Exploitation and Communication (PDEC)	ITC	R	Public	31 Jul 2023
WP4	D4.2	Dissemination and communication report	ITC	R	Public	31 Jan 2025
WP4	D4.3	BIOBoost Replication Guide	NCBR	R	Public	31 Jan 2025
WP5	D5.1	Project management handbook	FBCD	R	Public	30 Apr 2023
WP5	D5.2	Data management and ethics plan	FBCD	DMP	Public	30 Apr 2023

Table 5: Schedule of internal review

	FBCD	UNI	LIC	ITC	ONT	B4C	NCBR	CLIC
D1.1				Review			M3	
D1.2	Review						M21	
D2.1		M3			Review			
D2.2			Review					M24
D2.3					Review			M24
D3.1			M2					Review
D3.2		Review						M24
D4.1				M6		Review		
D4.2				M24		Review		
D4.3		Review					M24	
D5.1	M3				Review			
D5.2	M3					Review		



How are deliverables sent to the European Commission?

The project coordinator will submit the deliverables via the Sygma Platform.

6. RISK MANAGEMENT

Risks that may affect considerably the progress and quality of the project have been identified and relevant contingency plans elaborated. The list of risks will be updated on an ad hoc basis or once every six months.

6.1 Main risks and contingency plans

Two types of risks have been identified:

- Internal risks linked with the operation of the project team, delays, changes in the project team, poor performance etc.
- External risks outside the control of the consortium, e.g. a global crisis.

Risks are assessed separately and reported in the reports to the Commission. Each WPL is responsible to identify additional risks that may arise during the implementation of the project and to constantly assess those that have been identified. Contingency planning may be adapted accordingly.

6.2 Risk process and roles

Risks are handled by the SC, PC and WPL:

- The SC has the decisive role on which countermeasures should be applied, by whom and when.
- The PC has the role of informing the SC about the identified risks, monitoring the implementation of the countermeasures, and assessing the results / outcomes.
- WPL inform the PC on the date a new risk is identified. Every six month the already identified risks will be assessed.

6.3 Corrective actions - Contingency plans

In case that a risk is identified and/or project's effort does not conform to the project's work-planning and/or objectives, the PC may apply corrective actions (based on SC decisions). In case of non-conformities, the PC may also activate contingency plans. With that in mind, the table below summarises the main internal and external risks as well as respective contingency plans.

Table 6: Critical risks and risk management strategy

Risk number	Description	Work Package No(s)	Proposed Mitigation Measures
1	Inability to motivate and engage with other innovation ecosystem actors, to involve them in BIOBoost activities (Low / High)	WP2, WP1	The consortium has extremely close contacts with key support actors across Europe and is firmly engaged with numerous networks. However, if there are insufficient innovation ecosystem organisations taking part, a recruitment campaign will be run using all consortium contacts, explaining the benefits of participation. Using all networks, BIOBoost will ensure the participation of ecosystems outside the consortium, with particular emphasis on widening countries
2	Insufficient quality of SMEs for hackathons and cross-border KAM (Low / High)	WP2, WP3, WP4	Insufficient quality of SMEs can be related to numbers of SMEs wishing to take part, or their potential to undertake innovation activities. The consortium expects to contact 240+ to recruit sufficient active SMEs to the project, and a further 210 will be engaged in WP4 via webinars and workshops, allowing the ability to screen off less relevant SMEs and making this an unlikely event. If more, higher-quality SMEs are needed, a campaign will be extended via the project's contact network, including contacts in local language to ensure as wide a number of SMEs take part as possible.
3	Inappropriate development of the replication guide and recommendations to policymakers. (Low / High)	WP4	The contents will be reviewed by partners and selected stakeholders from diverse innovation ecosystems, in order to ensure a high-quality output. Results may be tested on



			<p>policy maker partners particularly via NCBR networks</p>
4	<p>Poor performance of partners / Partner not responding to Coordinator and partners' requests. (Low / Medium)</p>	<p>WP2, WP3, WP5, WP4, WP1</p>	<p>The partners' long experience in implementing EU funded projects as well as their wide collaboration in other activities lowers the probability of poor performance of a partner and poor responsiveness. All the procedures will be described in a solid Consortium Agreement and a project handbook, enabling the coordinator to identify problems and take corrective actions.</p>
5	<p>Not reaching the KPIs and expected results defined. (Low / High)</p>	<p>WP2, WP3, WP5, WP4, WP1</p>	<p>The KPIs and expected results foreseen in the impact sections are based on previous activities organised under EU projects and have been carefully discussed by the consortium. The coordinator, and WP leaders, will monitor the expected KPIs and implement timely corrective measures.</p>
6	<p>Global crisis / pandemic (High / Medium)</p>	<p>WP2, WP3, WP5, WP4, WP1</p>	<p>In the event of similar disruptions from COVID-19 or similar, the project steering group will decide how to proceed, based on local, official health warnings. The consortium has assumed that there are continual risks of another global crisis or pandemic and most actions can be carried out online – including the hackathons, SME support, webinars and workshops.</p>





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