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This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No.101006923

## **D 4.1. Project Management Plan**



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<b>Work Package</b>	WP4: Project Management
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<b>Dissemination level</b>	Public
<b>Due date</b>	31/03/2021
<b>Delivery date</b>	17/04/2021
<b>Version</b>	Draft Version

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# 1. Introduction

## 1.1 The LASTING Project

Considering the diversity of the waterborne transport sector, its geographical scope, the international dimension and the challenges and opportunities upfront, LASTING (Let's go for Waterborne Transport Research – Broadening engagement and increasing impact) will broaden engagement of the broader waterborne transport sector in European RD&I activities, by developing a communication strategy, and implementing a long-lasting communication campaign beyond the lifetime of this project, ultimately increasing, stakeholder engagement in the sector and thereby increasing impact of European waterborne transport RD&I.

The communication strategy, and thereby the campaign will be based on clear KPI's set at the starting point of LASTING, jointly developed with the relevant European Commission Services and the broader waterborne transport sector. The achievement of the KPI's will be measured at fixed intervals, to ensure that the final communication strategy and the campaign will be fit-for purpose and ready for roll-out. An essential element of the communication strategy will be the development of a plug-and-play system for participation in European, national or regional strategic maritime and/or inland waterway transport events. In the framework of LASTING, the plug-and-play system will be tested at a number of occasions, to ensure the system is fit-for-purpose.

In addition, high quality dissemination materials (such as flyers and banners) and templates will be delivered. There will be a main focus on the use of digital tools for dissemination purposes, to ensure that the communication efforts of the waterborne transport community will easily follow the concept launched in the framework of LASTING. Finally, yet importantly, the Waterborne Technology Platform will take over the communication strategy and campaign after the lifetime of LASTING and will ensure a durable implementation of the concepts and materials developed in the framework of the project.

LASTING is coordinated by the Waterborne Technology Platform (SEA Europe is responsible for its secretariat), counting with the participation of a total of five partners from four EU countries.



Figure 1: LASTING's partners

LASTING is funded by the European Commission research and innovation programme Horizon 202, with an investment of 1,3 million Euro over the course of 36 months, starting in January 2021.



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## 1.2 Purpose of Deliverable 4.1 – Project Management Plan

**Deliverable 4.1: Project Management Plan** is the deliverable relating to the both the administrative and financial management (task 4.1) as well as the technical management (task 4.2) of the LASTING Project. The aspects of quality assurance and risk management of task 4.2 will be addressed in Deliverable 4.3.

Deliverable 4.1 will serve as a reference source for all LASTING consortium members covering many day-to-day activities. It provides procedures and guidelines on the day to day project management and on various elements of LASTING, e.g. project reports, deliverables, etc. through the use of agreed procedures and templates where and when relevant. Harmonious project procedures are to be followed as to maintain smooth and successful execution of all the tasks in the project and thereby contribute to a successful implementation of the project.

The document is drafted based on the expertise and experience of the project coordinator in the field of project management and specifically in the field of H2020 projects. In addition, liaison with other ongoing projects has been established, like with the PLATINA-3 project<sup>1</sup>.

This deliverable will be a dynamic document and will be updated as required throughout the project.

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<sup>1</sup> <https://platina3.eu/>





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## 2. Organizational structure

The organizational structure of LASTING at a general level consists of a number of individuals and bodies and the roles they perform.

The paragraphs below will provide a more in-depth understanding of each actor and the relevant role. A more extended description of the actors and roles is available in the Grant Agreement and/or the Consortium Agreement.

### 2.1 Steering Committee

The **Steering Committee** is formed by one member of each beneficiary organization and chaired by the project coordinator. The Steering Committee is the supervisory body for the execution of the Project which shall report to and be accountable to the General Assembly. The Steering Committee shall prepare the meetings, propose decisions and prepare the agenda of the General Assembly. In addition, the Steering Committee shall be responsible for the proper execution and implementation of the decisions of the General Assembly and monitors the effective and efficient implementation of the LASTING project. STEERING Committee meetings will be held at least four times per year and combined with other meetings and/or events where possible.

### 2.2 Project Manager

The Coordinator appointed a **Project Manager**. The Project Manager is responsible for the day-to-day monitoring of the project with respect to milestones, deliverables, resources used and technical tasks. The Project Manager is responsible for liaising with the European Commission on contractual matters and of setting the agenda for the meetings of the STEERING Committee. In addition, the Project Manager consolidates individual contributions to technical, financial and administrative reports that are a statutory requirement of the Grant Agreement. Finally, the Project Manager ensures the smooth management of the LASTING project and liaises with the various Work Package Leaders to ensure the stringent timeframes for tasks are met.



## 2.3 Work Package Leaders

To better facilitate the technical management at a more detailed level, each Work Package appointed a Work Package Leader. The Work Package Leader's role includes the coordination and project management of activities of the Work Package for which they are responsible. This role includes liaising with the Task-Leaders and the Project Coordinator to ensure good project progress and timely completion of all project deliverables and milestones. Specifically, the WP Leaders will:

- Plan and organise the technical activities within the respective Work Packages (WPs);
- Monitor the progress of activities within the WP by comparison with those planned;
- Provide WP progress reports every 6 months delineating adherence (or otherwise) to the project workplan;
- Where unforeseen circumstances necessitate deviation from the work plan, the WP Leader will be responsible for identifying suitable contingencies;
- Communicate any success, deviation and/or proposed contingency, via the Project Coordinator, to the Steering Committee for their consideration;
- Organise, chair and prepare the minutes of WP meetings.

## 2.4 General Assembly

The General Assembly is the **main decision-making body** of the project. The General Assembly consists of the coordinator, by whom it is chaired, and all other beneficiaries.

The General Assembly is a platform to exchange information on work progress and results between all beneficiaries. It also decides on overall main project issues such as strategies, corrective measures, project redirection, conflict resolution and non-performance. Voting will be based on one-vote-per-partner, and procedures are further outlined in the Consortium Agreement. The Steering Committee will make proposals for such decisions to be made in the General Assembly (if needed). The General Assembly has to competence regarding issues impacting the overall work plan, the Grant Agreement and the Consortium Agreement. General Assembly meetings will be held back-to-back with other events/meetings where possible.



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## 2.5 Advisory Body

In the course of the LASTING project, the Advisory Board will bring together a broad range of waterborne transport stakeholders to support the project. The Advisory Board will support the project by identifying and enable contacts with key stakeholders, as well as involvement in all communications and dissemination activities. The Advisory Board will have no operational responsibility, and will act in a fully advisory capacity. An open call is foreseen to set-up the Advisory Board.

## 2.6 Project Officer

Renata Kadric is the Project Officer who represents the Innovation and Networks Executive Agency (INEA) of the European Commission, i.e. the party with whom the Grant Agreement has been concluded.

The Project Coordinator will be in direct contact with the Project Officer for the arrangements laid down in the Grant Agreement and any questions relating to the implementation of arrangements laid down. Any questions from consortium members to INEA shall be channelled and directed via the Project Coordinator (SEA Europe, acting as Secretariat of the Waterborne Technology Platform).



## 3. Work structure

### 3.1 Work packages and tasks

Next to the organisational structure at a general level, there is a working structure for carrying out the actual tasks and work packages towards delivering the foreseen project outputs as included in the Grant Agreement.

There are a number of related tasks to be carried out in the project that are grouped into specific work packages. The LASTING Project has five work packages, as illustrated in figure 1. Each work package is led by a Work Package leader, as described in chapter 2. The Work Package leaders per Work Package are: WP1 – SPB/EICB, WP2 – SEA Europe, WP3 – BCW, WP4 – SEA Europe and WP5 – SEA Europe. The role of the Work Package Leaders has been described in Chapter 2.

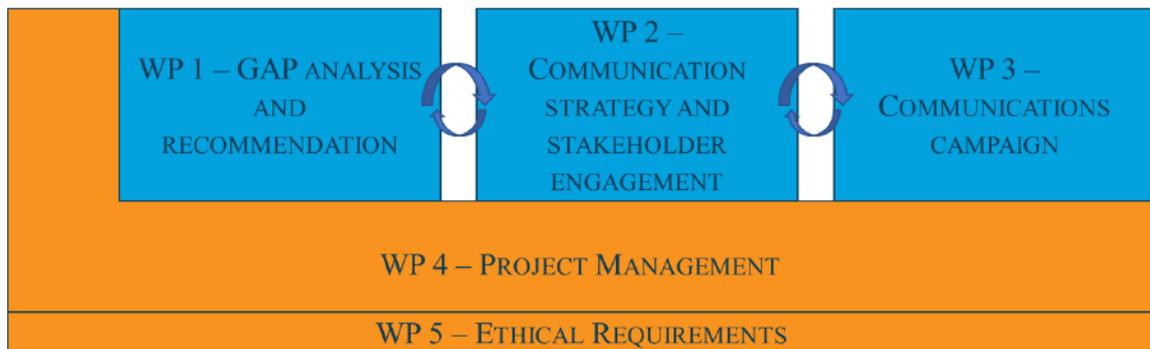


Figure 1: LASTING Project Structure

Each Work Package consists of a number of tasks led by a task leader, who will be responsible for managing and coordinating the specific tasks for the timely finalization of the corresponding deliverable. Figure 2 provides an overall view of the work packages and the corresponding tasks and deliverables including the beneficiaries in the lead. Figures 3 and 4 provide respectively insights into the dependencies between deliverables with a input-output relation overview and into the planning with a Gantt chart.

WP nr.	WP title	WP Leader	Task	Task Name	Task Leader	Deliverable	Deliverable title
1	Information Gap Analysis and Recommendations	SPB	1.1	Information Gaps concerning Innovation Needs	SPB	1.1	Report on Innovation Gaps concerning Innovation Needs
			1.2	Awareness of outcomes of research projects and activities	VPF	1.2	Report on Research Management Systems and Maintenance
			1.3	Opportunities for participation in research and deployment of their results	PRO	1.3	Report on Opportunities for Participation
			1.4	Consolidation of findings, recommendations and proposal for future monitoring tools	SPB	1.4	Gap Analysis Recommendations
2	Communication Strategy and Stakeholder Engagement	SEA	2.1	Development of the plan for exploitation and dissemination of results (PEDR)	SEA	2.1	Draft PEDR
			2.1	Development of the plan for exploitation and dissemination of results (PEDR)	SEA	2.3	Intermediate PEDR
			2.1	Development of the plan for exploitation and dissemination of results (PEDR)	SEA	2.4	Final PEDR
			2.2	Stakeholder engagement	PRO	2.1	Draft PEDR
			2.2	Stakeholder engagement	PRO	2.3	Intermediate PEDR
			2.2	Stakeholder engagement	PRO	2.4	Final PEDR
			2.3	Creative Concept	BCW	2.2	Creative Concept
3	Communications Campaign	BCW	3.1	Develop the campaign plan and communication materials	BCW	3.1	Campaign Plan
			3.1	Develop the campaign plan and communication materials	BCW	3.2	Communication Materials and Toolbox
			3.2	Campaign roll-out	BCW	3.3	Campaign Evaluation Report (1st)
			3.2	Campaign roll-out	BCW	3.4	Campaign Evaluation Report (2nd)
			3.2	Campaign roll-out	BCW	3.5	Third Campaign Evaluation Report
			3.3	Campaign Evaluation	BCW	3.3	Campaign Evaluation Report (1st)
			3.3	Campaign Evaluation	BCW	3.4	Campaign Evaluation Report (2nd)
			3.3	Campaign Evaluation	BCW	3.5	Third Campaign Evaluation Report
4	Project Management	SEA	4.1	Administrative and Financial Management	SEA	4.1	Project Management Plan
			4.2	Technical Management, quality assurance and risk management	SEA	4.2	QA, IPR and RMMS procedures; report describing QA, IPR, Risk Management Procedures
			4.2	Technical Management, quality assurance and risk management	SEA	4.3	Data Management Plan
			4.3	Details on Identifying and Recruiting Participants	SEA	4.4	Report covering the details on Identifying and Recruiting Participants
			4.4	Confirmation and ensurance of standards/guidelines regarding ethics and staff health and safety	SEA	4.5	Report on the application of H2020 ethics requirements and details on materials imported/export to/from the EU
			4.4	Confirmation and ensurance of standards/guidelines regarding ethics and staff health and safety	SEA	4.6	Report on the ensurance of health and safety of staff
5	Ethics Requirements	SEA	5	POPD - Requirement No. 1	SEA	5.1	POPD - Requirement No. 1

Figure 2: Overview of wp's, tasks and deliverables

Figure 3 presents the tasks and the input/output relations between the tasks based on the detailed input/output specification in the Work Packages and task descriptions. The cells marked with color blue mean that they have an input/output link. The tasks listed in the horizontal axis provide the respective output and the tasks listed on the vertical axis receive this input from the respective tasks. It can be seen that WP4 and WP5 tasks all provide input to tasks in WP 1 – 3 and vice versa.



### 3.2 Internal Communication

This paragraph present the relevant internal communication procedures and guidelines.

#### **Microsoft TEAMS**

Microsoft TEAMS is used as online platform for storage of files and file sharing and for video and conference calls. In addition, ZOOM might be used for video and conference calls. SEA is managing the TEAMS environment and invites the relevant contact persons to the LASTING Teams environment. Any updates on new staff will be notified by the respective beneficiary and subsequently access rights will be granted by SEA to the TEAMS environment of LASTING.

The LASTING TEAMS environment consists of so-called channels, six in total, one general channel and one for each work package (WP1 – 5). Only those beneficiaries that have a role in the work package according to the Grant Agreement will be added to the respective channel. The work package leaders will have access to all channels.

Working on TEAMS is made as safe as needed and enables the project to fulfil the relevant requirements. This is safeguarded in the way how we work on MS TEAMS. Safety is partially ensured by leaving the monitoring in TEAMS largely in the hands of one organisation, in this case the project coordinator SEA. However, individual partners must also contribute to ensuring the safety. Here we must also take into account simple aspects such as:

- When working on TEAMS behind your laptop, do not leave it unattended;
- Not to work on TEAMS when using public networks such as the hotel WIFI, public transport, etc..;
- Not to share TEAMS links (e.g. URL's of documents on TEAMS) with persons outside the consortium.

Furthermore, when working on TEAMS the ethics requirements needs to be considered, for example as regards saving documents containing personal data.



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## Document names

To allow easy tracking and retrieval of project documents a systematic approach should be used. Moreover, the version of the document should be clearly identifiable.

Each document name start with the date (in reversed order) on which the document was sent and/or released. This way, no version numbers are needed in the title.

**Names of deliverables** according to the following structure:

- (Date of document)\_LASTING\_(Deliverable number)\_(Deliverable title)\_draft/final
- Example: 210410\_LASTING\_4.1\_Project\_Management\_Plan\_draft

**Naming of other documents** according to the following structure:

- (Date of document)\_LASTING\_(Main topic of document)
- Example: 210410\_LASTING\_Template\_Deliverable

## Email correspondence

The subject field of your e-mail should contain the following components:

- (LASTING) (Work Package or Task number): (Main topic of mail)
- Example: LASTING WP1: Minutes of Meeting 02.04.2021

The main addressee of the e-mail should be the responsible person to take action as a consequence of the e-mail. Persons who are put in copy (CC:) are generally not expected to take action as a result of your e-mail. Please also include dates or deadlines in which you expect the response. If no reply is provided within the deadline, the 'silence is approval' principle will be applied.





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### 3.3 External Communication

There will be many exchanges with external parties to the consortium for carrying out the work packages and corresponding tasks. Engagements will take place throughout the project, both for specific work packages and also in general to disseminate the results of LASTING.

The procedures and background for approaching and involving external parties in the project, and communicating about the project in general, is a topic that will be further addressed in the respective work packages and in deliverables 2.1, 2.3 and 2.4 (Various version of the PEDR) and the deliverables related to ethics requirements.

Communication with the Project Officer will always go via the project coordinator SEA. Beneficiaries shall not, on their own initiative and directly, contact the Project Officer.





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## 4. Reporting

According to the Grant Agreement, the project is divided into two reporting periods:

- Reporting period 1: from project month 1 (January 2021) to project month 18 (June 2022);
- Reporting period 2: from project month 19 (July 2022) to project month 36 (December 2023).

The coordinator must, on behalf of the consortium, submit to the Agency (see Article 20 of the Grant Agreement) the technical and financial reports. These reports include requests for payment and must be drawn up using the forms and templates provided in the Participant Portal electronic exchange system<sup>2</sup>.

There will be two periodic reports, to be submitted within 60 days following the end of each reporting period. In addition to the periodic report for the last reporting period, the final report needs to be submitted within 60 days following the end of the last reporting period. The following paragraphs provide information on the reporting periods and their contents.

### 4.1 Periodic reporting

The periodic report must include the following:

- A **'periodic technical report'** containing:
  - o An explanation of the work carried out by the beneficiaries;
  - o An overview of the progress towards the objectives of the action, including milestones and deliverables identified in Annex 1 of the Grant Agreement;
  - o This report must include explanations justifying the differences between work expected to be carried out in accordance with Annex 1 of the Grant Agreement and that actually carried out;
  - o The report must detail the exploitation and dissemination of the results and – if required in Annex 1 of the Grant Agreement – an updated 'plan for the exploitation and dissemination of results';
  - o The report must indicate the communication activities;
  - o A summary for publication by the Agency;
  - o The answers to the 'questionnaire', covering issues related to the action implementation and the economic and societal impact, notably in the context of

<sup>2</sup> <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home>





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the Horizon 2020 key performance indicators and the Horizon 2020 monitoring requirements.

- A **'periodic financial report'** containing:
  - An "individual financial statement" (see Annex 4 of the Grant Agreement) from each beneficiary and from each linked third party, for the reporting period concerned;
  - The individual financial statements must detail the eligible costs (actual costs, unit costs and the flat-rate costs; see Article 6 of the Grant Agreement) for each budget category (see Annex 2 of the Grant Agreement);
  - The beneficiaries and linked third parties must declare all eligible costs, even if-for actual costs, unit costs or flat-rate costs – they exceeded the amounts indicated in the estimated budget (see Annex 2 of the Grant Agreement). Amounts which are not declared in the individual statement will not be taken into account by the Agency;
  - If an individual financial statement is not submitted for a reporting period, it may be included in the periodic financial report for the next reporting period;
  - The individual financial statements of the last reporting period must also detail the receipts of the action (see Article 5.3.3 of the Grant Agreement);
  - Each beneficiary and each linked third party must certify that:
    - The information provided is full, reliable and true;
    - The costs declared are eligible (see Article 6 of the Grant Agreement);
  - An **explanation of the use of resources** and the information on subcontracting (see Article 13 of the Grant Agreement) and in-kind contributions provided by third parties (see Articles 11 and 12 of the Grant Agreement) from each beneficiary and from each linked third party, for the reporting period concerned;
  - A **'periodic summary financial statement'**, created automatically by the electronic exchange system, consolidating the individual financial statements for the reporting period concerned and including – except for the last reporting period – the **request for interim payment**.

In addition to the periodic report for the last reporting period, the coordinator must submit the final report within 60 days following the end of the last reporting period.

The **final report** must include the following:

- A **'final technical report'** with a summary for publication containing:
  - An overview of the results and their exploitation and dissemination;
  - The conclusions on the action;
  - The socio-economic impact of the action.





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- A **'final financial report'** containing:
  - A 'final summary financial statement', created automatically by the electronic exchange system, consolidating the individual financial statements for all reporting periods and include the request for payment of the balance;
  - A 'certificate on the financial statements' (drawn up in accordance with Annex 5 of the Grant Agreement) for each beneficiary and each linked third party, if it requests a total contribution of € 325.000 or more, as reimbursement of actual costs and unit costs calculated on the basis of its actual cost accounting principles (see Article 5.2 and Article 6.2 of the Grant Agreement).





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## 5. Conclusion

This deliverable provides guidance in the daily work of the LASTING consortium and should be consulted by all project beneficiaries to facilitate an efficient and effective work process. It provides the necessary insights into the organization structure, the work structure, the interrelation between various tasks and deliverables and the reporting. The document will be updated on a frequent basis, taking into account the most recent and relevant changes.

