

ATHENA

Implementing gender equality plans to unlock research potential of RPOs and RFOs in Europe

D1.1 Management and Coordination Plan



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¹ PU= Public, CO=Confidential, only for members of the consortium (including the Commission Services), CL=Classified, as referred to in Commission Decision 2001/844/EC

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Acronyms & Abbreviations

AB	Advisory Board
AGA	Annotated Model Grant Agreement
DoA	Description of Action
EC	European Commission
GEP	Gender Equality Plan
GA	Grant Agreement
GA	General Assembly
PO	Project Officer
RFO	Research Funding Organization
RPO	Research Performing Organization
SC	Steering Committee
WP	Work Package

1 Introduction

1.1 Purpose and scope

The present deliverable entitled 'Management and Coordination Plan' defines the procedures that need to be appropriately established to ensure the quality of the ATHENA management activities and of the deliverables to be submitted to the EC.

This document should be used by ATHENA consortium as reference manual during the implementation of the action. The aim is to facilitate the management of the project, the monitoring of overall progress and the communication between project partners and the Commission.

In order to ensure relevance of the quality plan, this document will be revisited regularly, throughout the project execution and especially when contractual changes occur.

The deliverable is based on the terms and conditions established in the Grant Agreement (GA) and its Annexes, as well as in the Consortium Agreement.

1.2 Document structure

This deliverable describes:

- ATHENA legal aspects, including main descriptions and relevant information of the project Grant Agreement, the Consortium Agreement and amendments (**section 3**).
- Project management structures, role and responsibilities of the different project management bodies (**section 4**).
- Decision-making procedures and conflict resolution (**section 5**).
- A coordination plan including a description of the tasks' responsibilities; a procedure for risk management and mitigation measures; the project deliverables and milestones and general guidelines for document identification (**section 6**).
- Reporting requirements for WP leaders and project partners (**section 7**).
- General project information on payments (**section 8**).
- Main aspects for internal and external communication and dissemination requirements (**section 9**).

2 General project information

Table 1. General project information

Title	Implementing gender equality plans to unlock research potential of RPOs and RFOs in Europe
Acronym	ATHENA
Grant Agreement No.	101006416
Funding Programme	Horizon 2020
Instrument	Coordination and Support Action (CSA)
Topic	SwafS-09-2018-2019-2020 - Supporting research organisations to implement gender equality plans
Project start date	01/02/2021
Project Duration	48 months
Project coordinator	Michelle Perello Consulta Europa Projects and Innovation S.L. Leopoldo Matos 16, bajo 35006 Las Palmas de Gran Canaria Las Palmas, Spain michelle.perello@consulta-europa.com

Table 2. ATHENA consortium

Participant No.	Participant organisation name	Acronym	Country
1	Consulta Europa Projects and Innovation	CE	ES
2	Jozef Stefan Institute	JSI	SL
3	Jan Kochanowski University in Kielce	UJK	PL
4	University of Bucharest	UB	RO
5	University of Las Palmas de Gran Canaria	ULPGC	ES
6	National Research Council. Institute for Research on Population and Social Policies	CNR	IT
7	Ustav Vyskumu Socialnej Komunikacie Slovenskej Adademie VIED	UVSK SAV	SK
8	University of Ruse Angel Kanchev	URAK	BG
9	Agencia Canaria de Investigación, Innovación y Sociedad de la Información	ACIISI	ES
10	Fundo Regional para a Ciencia e Tecnologia	FRCT	PT

3 Legal aspects

3.1 Grant Agreement

The Grant Agreement (GA) constitutes the legal basis for ATHENA implementation. The GA includes:

- Terms and conditions;
- Annex 1 Description of the Action (DoA);
- Annex 2 Estimated budget for the action;
- Annex 3 Accession Forms for beneficiaries;
- Annex 4 Model for the financial statements;
- Annex 5 Model for the certificate on the financial statements;
- Annex 6 Model for the certificate on the methodology.

The contract with the European Commission has been digitally signed by all ATHENA partners and it is downloadable from the Funding & Tender Portal: <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home>

3.2 Consortium Agreement

The Consortium Agreement (CA) is a private agreement between the ATHENA beneficiaries that complements the GA and set out the rights and obligations amongst the consortium. The agreement does not involve the European Commission/Agency and includes provisions such as decision-making, conflict resolution, financial issues, liability or intellectual property rights.

3.3 Amendments

Along the project duration, specific circumstances that require an amendment of the GA may arise. These circumstances may vary and might be due to change of partner(s), change of legal entity or changes in the DoA.

In case an amendment is needed, the coordinator shall submit a request to the ATHENA project officer (PO) after the autonomous decision in the General Assembly (GA) by all partners. Once approved in the GA, the coordinator will inform the consortium of the revised Grant Agreement, replacing former versions.

Changes in the budget not affecting the content of the work can be dealt by the consortium itself, upon decision in the GA.

For H2020 policy on amendments, see [Article 55 of the Annotated Model Grant Agreement](#).

4 Management structure and procedures

4.1 Project organizational structure

The project management consists of the following structures, whose interaction is shown in Figure 1 below:

- ATHENA project coordinator
- Financial Manager
- Dissemination Manager
- Steering Committee
- General Assembly
- Advisory Board

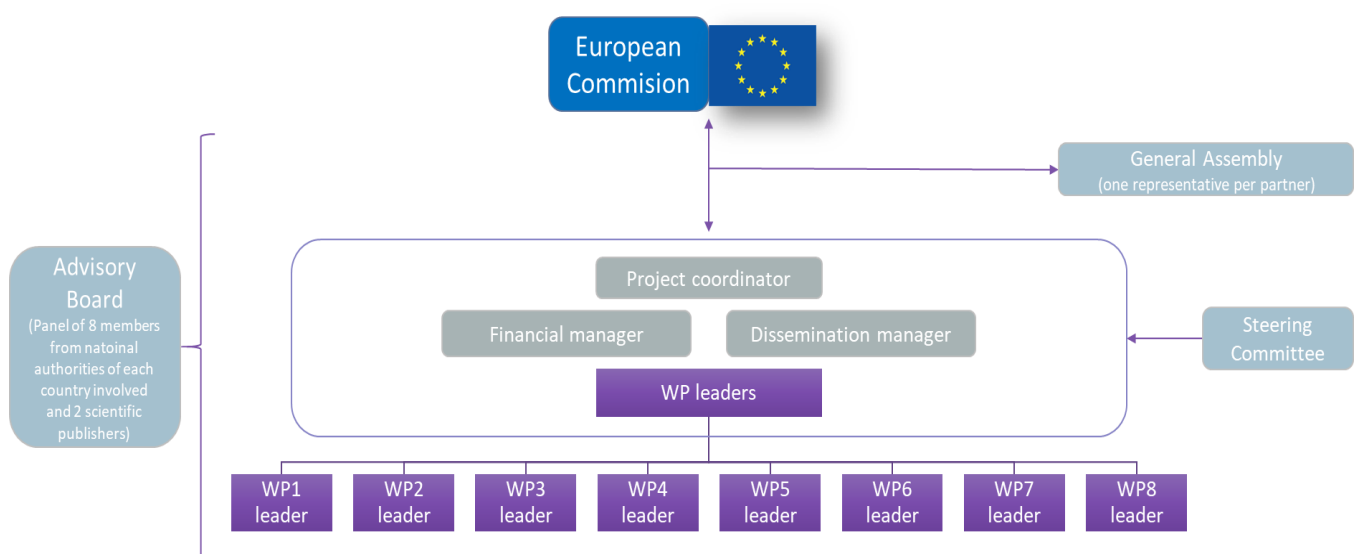


Figure 1. Project organisational structure

4.2 Management Structure

ATHENA management structure is composed of the Steering Committee (SC), the General Assembly (GA) and the Advisory Board (AB). Descriptions of these bodies are reported in the following 4.3, 4.4 and 4.5 sections.

The *ATHENA coordinator* is Michelle Perello, CEO of Consulta Europa Projects and Innovation. She, together with the Consulta Europa team dedicated to support ATHENA project activities, will be in charge of:

- ensuring effective co-ordination and collaboration among partners within the project;
- monitoring project progress;
- ensuring the fulfilment of the overall goals of the project within the time and budget constraints;
- providing a common interface by representing the entire Consortium towards the European Commission, as well as towards other projects and in dissemination events;

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- ensuring internal communication using different tools (e.g. exchange of e-mail, Skype, phone calls, set up of a project Drive fold as a virtual space for document repository and resource sharing, drafting of a Management plan);
- guaranteeing technical homogeneity in project development and in the achievement of the expected results;
- ensuring that any deviation from the plans are resolved involving the Steering Committee as necessary;
- managing regular and effective project meetings and reviews, coordinating the preparation and distribution of all reports, maintaining accurate records of cost and effort reports by partners;
- identifying and analysing potential risks and determining the necessary measures to minimise them.
- preparing, collecting and, if necessary, integrating financial, reporting and administrative data from partners;
- maintaining accounts and reporting to the European Commission in order to guarantee the punctual issuing of project deliverables, the necessary exchange of information and an appropriate administrative and financial management of the project.

As stated in the CA, the project coordinator is the legal entity acting as the intermediary between the members of the consortium and the Funding Authority.

The *Financial Manager* will be Cira Mendoza from Consulta Europa. She will be in charge of the financial project management and the assistance to the partners in the preparation of their financial reports to be submitted to the Commission.

The *Dissemination Manager* will be Lina Silveira from FRCT. Given her experience and expertise in EU projects she will ensure that project outcomes and thus the results of the implementation of the GEPs in partner institutions will be disseminated to a wide community, ensuring the sustainability of initiated actions also after the project end.

4.3 Steering Committee

The Steering Committee is primarily **responsible for internal and external project communication, as well as for financial management and coordination among partners and effectiveness of dissemination and exploitation of project outcomes**. It is the supervisory body for the execution of the project and is responsible for proper execution and implementation of the decisions of the General Assembly. As it can be observed in Figure 1, the SC is composed of the project coordinator, the Financial Manager, the Dissemination Manager and WP leaders.

Decisions in the Steering Committee will be taken by vote: the qualifying majority of two third of the members will be needed to approve any decision. The Steering Committee will report to the General Assembly.

WP Leaders will be responsible for the supervision of the achievement of the objectives of their WP and will ensure the coordination and communication among WPs through the milestones and deliverables that will be drafted and made available for the Steering Committee before their submission. Milestones and deliverables will be used as necessary tools not only to share easily the results and the contents of the WPs, but also to make clear to the SC where the project is and which are the next steps to be accomplished.

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In addition, the SC shall:

- Support the project coordinator in preparing meetings with the Funding Authority and in preparing related data and deliverables;
- Prepare the content and timing of press releases and joint publications by the consortium or proposed by the Funding Authority.

Table 1 below presents the list of the members appointed as part of the Steering Committee of ATHENA.

Table 3. Steering Committee members

Role	WP name	Representative	Organisation
Project coordinator/ Leader of WP1, WP3 and WP4	WP1 – Management and Coordination WP3 – Capacity building for systemic institutional change WP4 – GEPS development and implementation	Michelle Perello	CE
Financial Manager	WP1 – Management and Coordination	Cira Mendoza	CE
WP2 leader	WP2 – Gender equality Audit and assessment of procedures and practices at organisational and national level	Gabriel Bianchi, Miroslava Zilinska, Barbora Holubova	UVSK SAV
WP5 leader	WP5 – Monitoring evaluation	Patrizia Grifoni	CNR
WP6 leader	WP6 – Sustainability strategy to ensure replication of GEPs and project results	Daniel Pavlov	URAK
Dissemination Manager/WP7 leader	WP7 – Dissemination and communication	Lina Silveira; Luz Paramio; Gisela Nascimento	FRCT

4.4 General Assembly

The General Assembly **includes representatives from all partner organisations involved** with the aim of overseeing project progress and preparing the reporting. It is chaired by the Project coordinator and will meet once a year to discuss about the outcomes and results of the previous year of work. The SC will present the work plan for the following year. The GA will review the progress of the project, supporting the SC in identifying problems and solutions and ensure high levels of communication, integration, dissemination and effective activity exploitation. In this regard, it will take technical decisions on the project by monitoring the technical results and taking decisions about tasks organisation and planning. It might suggest changes to the global planning and the structure of the project, whenever needed.

4.5 Advisory Board

The Advisory Board (AB) is composed by a panel of **external experts responsible for providing non-biased support and guidance in the implementation of the planned GEPs and monitoring project performance**. As requested by the call, the panel of experts will include the participation of at least one member of a national authority representative from the countries involved and two representatives of scientific publishers. 'D1.2 Advisory Board and its protocol' due by M5 (June 2021) will report the list of experts composing the AB and their work procedures.

The AB will meet once per year in conjunction with Steering Committee and General Assembly meetings (see Table 4), providing strategic direction, supporting quality improvement and assessing project effectiveness.

4.6 Meetings

ATHENA meetings are plenary meetings and parallel sessions combining technical progress.

- **General Assembly meetings** will be held at least four times during the project lifetime. The coordinator is responsible for the meeting organization (invitations, agenda and communication of the meeting details like time and place).
- The **Steering Committee members** will meet twice a year and periodically meetings (once a month, or more if extraordinary meetings will be requested by one partner of the SC and approved by the majority of the others) will be held by using online platforms. The coordinator is responsible for the meeting organization (invitations, agenda and communication of the meeting details like time and place).
- The **meetings of the Advisory Board** will take place in connection to the General Assembly and Steering Committee meetings at M12, M36 and M48. The AB will meet remotely at M24. The travel expenses of the AB members for participation in the project meeting will be reimbursed by the coordinator. In addition, the AB members can be invited to participate in an online teleconference/call if needed.
- **Regular meetings** may be organized by WP or task leaders to discuss certain aspects of their activities. Each WP/task leader will propose the meeting schedule according to their WP/task needs at least 1 week before the date of the meeting and will coordinate the necessary actions among the involved partners. For every meeting taken place, the chair of the meeting will communicate to the coordinator the suggested points of the agenda and shall make sure that minutes are sent to the coordinator and partners involved within 15 days after the meeting.

As stated in the CA, the chairperson shall produce written minutes of each meeting which will be the formal record of the decisions taken. The draft minutes will be sent to all members within 10 calendar days of the meeting. The minutes shall be considered as accepted if, within 15 calendar days from sending, no member has sent an objection in writing to the chairperson with respect to the accuracy of the draft of the minutes. The chairperson will send the accepted minutes to all the members of the consortium and to the coordinator, who shall safeguard them.

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Costs for travel and accommodation for meetings participation must be covered by each partner's own budget. Costs related to the organisation of these meetings (such as catering, room facilities and one dinner) will be borne by the host of the meeting.

Table 4. Planned ATHENA meetingsreports the planned ATHENA meetings.

Table 4. Planned ATHENA meetings

No.	Project meetings	Month/year	Location	Hosting partner
1	Kick-off meeting	M1 – February 2021	Gran Canaria, ES	CE
2	SC Meeting	M6 – July 2021	Ruse, BG	URAK
3	SC + GA + AB Meetings + face-to-face training	M12 – January 2022	Azores, PT	FRCT
4	SC Meeting + Mutual learning event	M18 – July 2022	Kielce, PL	UJK
5	SC Meeting + GA + Mutual learning event	M24 – January 2023	Ljubljana, SL	JSI
6	SC Meeting	M30 – July 2023	Bratislava, SK	UVSK SAV
7	SC Meeting + GA + AB + Mutual learning event	M36 – January 2024	Bucarest, RO	UB
8	SC Meeting	M42 – July 2024	Rome, IT	CNR
9	SC Meeting + GA + AB + Open final Conference	M48 – January 2025	Brussels, BG	FRCT

5 Decision-making procedures and conflict resolution

The voting and dispute resolution procedures in ATHENA will follow the provisions outlined in the CA.

5.1 Voting rules and quorum

The SC shall not deliberate and decide validly unless two-thirds (2/3) of its Members are present or represented (quorum). If the quorum is not reached, the project coordinator shall convene another ordinary meeting within 15 calendar days. If in this meeting the quorum is not reached once more, the coordinator shall convene an extraordinary meeting which shall be entitled to decide even if less than the quorum of Members are present or represented.

Each Member of the SC present or represented in the meeting shall have one vote. However, a Party which the SC has declared to be a Defaulting Party may not vote.

Decisions shall be taken by a majority of two-thirds (2/3) of the votes cast.

5.2 Veto rights

A Member which can show that its own work, time for performance, costs, liabilities, intellectual property rights or other legitimate interests would be severely affected by a decision of a Consortium Body may exercise a veto with respect to the corresponding decision or relevant part of the decision.

When the decision is foreseen on the original agenda, a Member may veto such a decision during the meeting only. Nevertheless, when a decision has been taken on a new item added to the agenda before or during the meeting, a Member may veto such decision during the meeting and within 15 calendar days after the draft minutes of the meeting are sent. A Party that is not a Member of a particular Consortium Body may veto a decision within the same number of calendar days after the draft minutes of the meeting are sent.

When a decision has been taken without a meeting a Member may veto such decision within 15 calendar days after written notification by the chairperson of the outcome of the vote.

In case of exercise of veto, the Members of the related Consortium Body shall make every effort to resolve the matter which occasioned the veto to the general satisfaction of all its Members.

A Party may neither veto decisions relating to its identification to be in breach of its obligations nor to its identification as a Defaulting Party. The Defaulting Party may not veto decisions relating to its participation and termination in the consortium or the consequences of them.

A Party requesting to leave the consortium may not veto decisions relating thereto.

5.1 General Assembly decisions

The following decisions shall be taken by the General Assembly:

- i. Proposals for changes to Annexes 1 and 2 of the Grant Agreement to be agreed by the Funding Authority.

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- ii. Changes to the Consortium Plan.
- iii. Modifications to Attachment 1 (Background Included).
- iv. Additions to Attachment 3 (List of Third Parties for simplified transfer according to Section 8.3.2).
- v. Additions to Attachment 4 (Identified Affiliated Entities).
- vi. Modifications to Attachment 5 (Non-Disclosure Agreement Advisory Board).
- vii. Entry of a new Party to the consortium and approval of the settlement on the conditions of the accession of such a new Party.
- viii. Withdrawal of a Party from the consortium and the approval of the settlement on the conditions of the withdrawal.
- ix. Identification of a breach by a Party of its obligations under this Consortium Agreement or the Grant Agreement.
- x. Declaration of a Party to be a Defaulting Party .
- xi. Remedies to be performed by a Defaulting Party.
- xii. Termination of a Defaulting Party's participation in the consortium and measures relating thereto.
- xiii. Proposal to the Funding Authority for a change of the coordinator.
- xiv. Proposal to the Funding Authority for suspension of all or part of the Project.
- xv. Proposal to the Funding Authority for termination of the Project and the Consortium Agreement.
- xvi. On the basis of the Grant Agreement, the appointment if necessary of SC Members.

5.2 Conflict resolution

The chosen management structure will enable to prevent conflicts or spot them at an early stage, allowing a short reaction time. Fast communication channels such as e-mails or Skype meetings will indeed outline any possible problem at the very first moment, avoiding eventual misunderstandings.

Shortcomings and conflicts will be managed within the respective panels where possible; if not, they will be reported to the project coordinator for resolution within the Steering Committee.

All partners shall endeavour to settle their disputes amicably. If the disputes cannot be solved amicably, these shall be submitted to mediation in accordance with the WIPO Mediation Rules. The place of mediation shall be Brussels unless otherwise agreed upon.

Through the Consortium Agreement, all partners agreed to keep all mediation, arbitration and/or other legal proceedings strictly confidential as far as legally possible. This confidentiality undertaking shall, unless otherwise agreed by the affected partners, pertain to all information disclosed in the course of such proceedings, as well as any agreement, decision or award that is made or declared during the proceedings. A partner shall not, however, be prevented from disclosing such information in order to safeguard its rights in relation to another partner to the dispute, or if obliged to disclose the information pursuant to statute, regulation, authority decision, a stock exchange, contract or the like.

6 Coordination Plan

6.1 Tasks' responsibility

Tasks' responsibility has been defined for each activity to be carried out in the project. Table 5 indicates the organisations and the reference person for each project task.

Table 5. ATHENA tasks' responsibilities

List of tasks		Task leader	Representative
WP1 – Management and Coordination			
T1.1	Overall co-ordination and monitoring of activities	CE	Michelle Perello
T1.2	Kick-off and other periodic meetings	CE	Michelle Perello
T1.3	Maintaining accounts and reporting to the EU Commission	CE	Michelle Perello
T1.4	Establishment and coordination of the Advisory Board	CE	Michelle Perello
T1.5	Data Management Plan	CE	Michelle Perello
WP2 - Gender Equality Audit and assessment of procedures and practices at organisational and national level			
T2.1	Gender equality audit and assessment at organisational level	UVSK SAV	Gabriel Bianchi
T2.2	Assessment of existing national provisions	UVSK SAV	Gabriel Bianchi
T2.3	Identification of existing gender bias at organisational level	UVSK SAV	Gabriel Bianchi
T2.4	Gender equality reports	UVSK SAV	Gabriel Bianchi
WP3 – Capacity building for systemic institutional change			
T3.1	Establishment of Gender Equality Plans Implementation (GEPI) Committees	CE	Michelle Perello
T3.2	Capacity building for GEPI Committees	CE	Michelle Perello
T3.3	Gender training programme	CE	Michelle Perello
T3.4	Mutual learning workshops	CE	Michelle Perello
WP4 – GEPs development and implementation			
T4.1	GEPs Best practices analysis	UB	Laura Grunberg
T4.2	Definition of gender and diversity standards	CE	Michelle Perello
T4.3	Drafting a Toolbox for preparation of customised GEPs	CE	Michelle Perello
T4.4	Bilateral discussions with partner research organisations about their specific needs for drafting GEPs and development of GEPs	CE	Michelle Perello
T4.5	Approval and implementation of the tailored GEPs in the RPOs and RFOs	CE	Michelle Perello
WP5 - Monitoring and evaluation			
T5.1	Development of GEPs monitoring and evaluation system	UJK	Ana Kaminska
T5.2	GEPVISION: configuration of a tool for continuous GEPs monitoring	CNR	Patrizia Grifoni
T5.3	3 GEPs on-going monitoring	UJK	Ana Kaminska
T5.4	Impact and satisfaction measurement	UJK	Ana Kaminska

WP6 – Sustainability strategy to ensure replication of GEPs and project results			
T6.1	Stakeholder identification and involvement	CNR	Patrizia Grifoni
T6.2	Stakeholder engagement at local level	URAK	Daniel Pavlov
T6.3	Creation and maintenance of a web-based community platform with all project results and tools	CE	Michelle Perello
T6.4	Tailored activities for policy-makers and other research organisations	URAK	Daniel Pavlov
T6.5	Establishing synergies with the EURAXESS initiative and network	URAK	Daniel Pavlov
WP7 – Dissemination and communication			
T7.1	Development of a communication and dissemination strategy	FRCT	Lina Silveira
T7.2	Project visual identity and promotional materials	FRCT	Lina Silveira
T7.3	Project website, social media and newsletter	FRCT	Lina Silveira
T7.4	Open Source Scientific Publications	FRCT	Lina Silveira
T7.5	Participation and organisation of events and connection/synergies with similar initiatives	FRCT	Lina Silveira
T7.6	Final Conference	FRCT	Lina Silveira

6.2 Risks for implementation

The achievement of project objectives is always subject to influences beyond project direct control. Risk management requires identification, control and recording of risks, taking special emphasis of the consequences and the appropriate management actions. The first step in completing a risk assessment is to identify the risks and threats associated with the management and operational processes for the project and to assess the likelihood of each of them occurring and their consequences. A further step involves risk mitigation, that is trying to identify the most appropriate actions that need to be put in place following the risk assessment to reduce or eliminate the identified risk.

Within the framework of ATHENA, some critical risks that might affect project implementation have been identified and are listed in Table 6.

Table 6. Risks identified and proposed mitigation measures for ATHENA

Risk description	WP	Proposed risk-mitigation measures
Insufficient capabilities of one partner/replacement of human resources within one partner organisation	All	Partners have been involved in the project development and they had already demonstrated their degrees of expertise and skills. The management plan allows the partnership to detect at an early stage when some tasks cannot be accomplished by one partner. As corrective measure, project coordinator will: 1- Request project partner to substitute the human resource or resubmit the work done; 2- Reallocate the work to another partner; 3- The original partner will be removed from the consortium and the work allocated to a sub-contractor or an additional partner.

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Institutional resistance to GEPs implementation	WP4	Letter of commitments have been signed by the highest management structure of the RPO's implementing the GEPs at a proposal stage. In case of resistance, project coordinator will: i) request the project partner to comply with GEP implementation as specified in their letter of commitment; ii) in case this were be possible the original partner could be removed and the work could be moved to another additional partner.
Lack of participation or commitment of members of GEPI Committees	WP3	Members of GEPI Committees will be selected on the basis of already demonstrated interest and commitment toward achieving gender equality. Additionally, discussion with high managers will be undertaken to foresee any type of reward for the members of the Committees (reduction in teaching hours, performance credits/points). Where a specific member of a GEPI Committee will repeatedly miss to project activities, it will be substituted with another one. In cases, no substitutes will be available one representative per target group will still be considered eligible and useful for the project purposes.
Unsustainability of project results	All	The Consortium is strongly committed to continue project activities after the EC-funded period and to spread project outcomes and achievements at EU level. Letters of support have been collected from different organisations across Europe which showed their interest in project activities and are committed to disseminate ATHENA results. The platform and the website will ensure that the communication among partners will last even after the project implementation phase
Unexpected struggles when implementing methods to identify discriminating acts that hinder people's innovative think and possibilities.	WP2	A facilitator experienced in gender equality and diversity issues will work at this stage. A joint learning process ensuring people feel they can share their ideas without fear of judgment will be also used. As corrective measure, the facilitator and a designated staff team for gender equality in the organization, including managerial positions, will meet in a Gender Committee and will take the appropriate actions to remove discriminating acts and ensure a smooth implementation of the methods for GE.
Ongoing dissemination may take more effort and resources	WP7	a) Continuous on-line liaison between the Partners on their use of resources, (b) shared dissemination opportunities with other related projects, and (c) previous relevant experience of the partners, will ensure that this does not occur. As corrective measure, transfer of budget among category costs could be envisaged.
Delayed grant agreement signature	All	The project coordinator is in constant communication with project partners and will ensure that Declaration of Honors and Accession Forms are duly signed by each project partner within the given deadlines.
Delayed project grant funding	All	All project partners have financial viability to sustain operations related to the project activities for several months if necessary, so that project progress will not be

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		affected by a potential delay in grant funding.
COVID-19	All	The global epidemic currently taking place has forced many ongoing EU-funded projects to re-adjust their activities in accordance to national/international restrictions. Given the uncertainty on the evolution of the pandemic in the months to come, provisions must be taken in order to ensure that project activities run as smoothly as possible. Activities that can be performed remotely (ie. desk research, monitoring and evaluation of results, etc.) will remain unaltered. However, for activities involving physical interaction and travels (i.e. face-to-face trainings, mutual learning events, project meetings, etc.) alternatives to organize them remotely will be foreseen through the use of online platforms and tools such as Zoom, GoToMeeting, Skype, etc.). The costs associated to these platforms would be covered by the part of the budget initially foreseen for the physical activities. If this critical risk materializes, all aforementioned mitigation measures will be previously consulted with the Commission services.

6.3 Deliverables

6.3.1 List of Deliverables

Formal documents have been committed to be delivered by responsible partners as indicated in the DoA included in the GA. Table 7 lists the ATHENA deliverables.

Table 7. ATHENA deliverables

WP No.	No.	Title	Dissem. Level ²	Nature ³	Responsible partner	Delivery month	Delivery Date
WP1	D1.1	Management and Coordination Plan	PU	Report	CE	M3	Apr. 2021
	D1.2	Advisory Board and its protocol	CO	Report	CE	M5	Jun. 2021
	D1.3	Data Management Plan	CO	ORDP	CE	M2	Mar. 2021
WP2	D2.1	Common database for gender equality audit	PU	Report	UVSK SAV	M6	Jul. 2021
	D2.2	Report on national status in gender equality in each partner country	PU	Report	UVSK SAV	M5	Jun. 2021
	D2.3	Gender equality reports	PU	Report	UVSK SAV	M12	Jan. 2022

² PU = Public, CO = Confidential

³ Report, ORDP=Open Research Data Pilot, Website, Ethics.

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WP3	D3.1	Programme and material of the training for GEPI Committees	PU	Report	CE	M18	Jul. 2022
	D3.2	Programme and material of the Gender Training Programme	PU	Report	CE	M12	Jan. 2022
	D3.3	Reports on learning activities for GEPI Committees - v1	PU	Report	CE	M16	May 2022
	D3.4	Reports on learning activities for GEPI Committees - v2	PU	Report	CE	M24	Jan. 2023
	D3.5	Reports on learning activities for GEPI Committees - vfinal	PU	Report	CE	M36	Jan. 2024
WP4	D4.1	GEPs best practices compendium	PU	Report	UB	M11	Dec. 2021
	D4.2	Diversity Standards	PU	Report	CE	M16	May 2022
	D4.3	Toolbox “Toolkit for transforming the institutional culture in terms of gender aspects”	PU	Report	CE	M13	Feb. 2022
	D4.4	GEPs	PU	Report	CE	M17	Jun. 2022
WP5	D5.1	Guidelines on monitoring and evaluation	PU	Report	UJK	M16	May 2022
	D5.2	GEPVISION on-line tool	PU	Website	CNR	M18	Jul. 2022
	D5.3	GEP implementation monitoring reports - v1	PU	Report	UJK	M24	Jan. 2023
	D5.4	GEP implementation monitoring reports - vfinal	PU	Report	UJK	M36	Jan. 2024
	D5.5	Impact report	PU	Report	UJK	M48	Jan. 2025
WP6	D6.1	Database of stakeholders	CO	Report	CNR	M16	May 2022
	D6.2	Workshop report	PU	Report	URAK	M19	Aug. 2022
	D6.3	Workshop report	PU	Report	URAK	M47	Dec. 2024
	D6.4	ATHENA e-Platform for Action	PU	Website	CE	M13	Feb. 2022
	D6.5	Webinar for policy-makers and video interviews	PU	Website	URAK	M36	Jan. 2024
	D6.6	EURAXESS Webinar	PU	Website	URAK	M17	Jun. 2022
	D6.7	Policy briefs for feedback to the European Commission - v1	PU	Report	URAK	M30	Jul. 2023

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	D6.8	Policy briefs for feedback to the European Commission - v2	PU	Report	URAK	M48	Jan. 2025
WP7	D7.1	Dissemination and Communication strategy	PU	Report	FRCT	M3	Apr.2021
	D7.2	Project visual identity and website	PU	Report	FRCT	M5	Jun. 2021
	D7.3	Scientific and non-scientific publications	PU	Report	FRCT	M48	Jan. 2025
	D7.4	Reports on participation and organisation of events	PU	Report	FRCT	M30	Jul. 2023
	D7.5	Reports on participation and organisation of events	PU	Report	FRCT	M48	Jan. 2025
WP8	D8.1	H Requirement No.1	CO	Ethics	CE	M2	Mar. 2021
	D8.2	POPD - Requirement No. 3	CO	Ethics	CE	M2	Mar. 2021

6.3.2 Approval process of deliverables

WP leaders and task leaders are responsible for the successful implementation of the WPs and related tasks, preparing the corresponding deliverables and milestones.

Members of the Advisory Board can be consulted by the WP leaders or the project coordinator during the process of deliverables submission.

WP and task leaders are requested to respect the following points when submitting their deliverables:

1. The responsible of the deliverable sends the final draft version v0.1 to the WP leader;
2. The WP leader check the deliverable and send it two weeks before due date to the SC for review;
3. The involved WP leaders of the SC will give their feedback. Nevertheless, all WP leaders should give their explicit approval;
4. The WP leader sends the final document to the coordinator one week before due date for final check and approval;
5. ATHENA coordinator submits the deliverable to the EC by uploading it to the Participant Portal and to the internal communication platform.

When the drafting/submission of the deliverable occurs in periods of e.g. public holidays, the deliverable responsible should agree in a timely manner on an alternative feasible timeline with the reviewers and the project coordinator.

6.4 Milestones

As it is detailed in the Annotated Model Grant Agreement (AGA), milestones are control points in the action that help to chart progress. They may relate to the completion of a key deliverable, allowing the start of a next work phase or be needed at intermediary points.

They are internal outputs but are crucial to monitor the ATHENA activities and timely face problems and take, in case, corrective actions. In addition, they may prepare and set up material for future deliverables and also may pass information among WPs, ensuring coordination among the different activities. Table 8 below lists the ATHENA milestones and related information.

Table 8. ATHENA milestones

Milestone No.	Title	WP No.	Lead beneficiary	Due date	Means of verification
MS1	Data Management Plan	WP1	CE	M2	Data Management Plan approved
MS2	Management and Coordination Plan	WP1	CE	M3	After the kick-off meeting, a management and coordination Plan will be drafted identifying the person responsible for each task and the responsibilities inside the management bodies of the consortium
MS3	Common database for gender equality audit	WP2	UVSK SAV	M12	Indicators and data to be collected by RPOs and RFOs will be identified and communicated to project partners within this report
MS4	Members of GEPI committees identified	WP3	CE	M7	List of members of GEPI committees
MS5	Gender Training for GEPI Committees completed	WP3	CE	M12	Report of the training activities
MS6	Training activities for RPOs and RFOs completed	WP3	CE	M24	Report of the training activities
MS7	GEPs approved	WP4	CE	M17	GEPs texts approved
MS8	GEPs monitoring and evaluation system	WP5	UJK	M16	Monitoring and evaluation system working
MS9	Populating GEPVISION	WP5	CNR	M48	On-line data of GEPs implemented, allowing RPOs and RFOs to constantly and

					effectively monitoring progresses during GEPs implementation.
MS10	Dissemination and communication strategy	WP7	FRCT	M3	The dissemination and communication strategy developed within WP7 will be the basis for maximizing the impact of ATHENA.
MS11	Newsletters	WP7	FRCT	M8, M16, M24, M36, M42, M48	The project newsletters will be developed and translated into all the languages of the consortium organisations, providing information on projects activities and outcomes, as well as other news on gender dimension in research organisations and relevant updates gathered from the EURAXESS platform. They will be released at M8, M16, M24, M36, M42 and M48.

6.5 Document guidelines

The standard tools for documents will be Microsoft Word, Excel and Power Point. The final version of the documents generated under ATHENA will always be published as Adobe PDF format file. Documents prepared manually shall be scanned and stored in PDF format.

There are four types of document categories in ATHENA:

- Documents addressed to the EC: deliverables, progress and final reports and financial statements.
- Microsoft Office Word documents will be used internally: agendas, minutes, technical contributions, etc.
- Microsoft Office PowerPoint presentations, which will be used for project meetings, events, reviews, etc.
- Microsoft Office Excel sheets, which will be used internally: databases, financial statements, participant lists in project meetings and events, etc.

The partner responsible for ATHENA's communication will provide specific templates to be used by the partners for the different type of documents. The templates will be stored at the ATHENA SharePoint.

6.5.1 Naming convention

In order to facilitate adequate exchange of documents without losing track of them, ATHENA consortium is recommended to adopt specific file naming convention for project documents. This becomes particularly important for documents that require multiple contributions and reviews. In terms of file names, it is not easy to determine a fixed file naming convention covering every specificity. Nevertheless, the points below are recommended to be followed as much as possible:

- All documents should start by the project acronym 'ATHENA' (e.g. ATHENA – Kickoff meeting minutes.doc).
- Filenames for deliverables to be submitted to the EC shall be the deliverable code followed by the deliverable name as included in the deliverables Table 7 (e.g. 'ATHENA -D1.1 Management and Coordination Plan').
- In case a document is specific to a certain date, this date should be included in the filename following the form 'yyyy-mm-dd'. For instance, the minutes of a WP meeting on 18 March 2021 should be named 'ATHENA – WP2 Meeting Minutes 2021-03-18.docx'.
- Where a document is a template used to compile inputs from partners, the partner short name should be added in the filename as suffix (e.g. ATHENA – Financial report – CE.xls')
- In case different versions of a document are used, the version number should be added at the end of the name of the file. The version number should start as v0.1 for draft files and incremented in 0.1 steps. The final version of a document will be v1.0 and then increment in 0.1 steps for minor changes. For a major change, the version will become v2.0.
- Version number should be also changed by the originating author or owner of the file. For instance, when the author has received and implemented all changes to a first draft version of a deliverable, the document becomes 'ATHENA – D1.1 Management and Coordination Plan_v0.2.docx'.
- When comments have been made to a document from another partner, the filename should be changed to include at the end the initials of the person making the changes (e.g. ATHENA – D1.2 Management and Coordination Plan_v0.1_MP.docx).
- When asking for changes to a document, the use of track changes in Word is recommended.

7 Reporting

Reporting of the project progress will be made according to:

- i. **Internal progress reports.** Financial internal monitoring of each ATHENA beneficiary.
- ii. **Periodic report(s)** to the EU. Financial and technical information submitted to the EC to report on the latest activities progresses and eligible expenses incurred.

7.1 Internal financial reporting

Internal financial reporting will be carried out at M10 (November 2021), M25 (February 2023) and M42 (July 2024) in order to monitor the project expenditure and deviations up to the internal submission dates. This reporting is internal, meaning that it is not sent to EC, and therefore, is not subject to payments.

The process of handing in the Financial Overview of each partner is as follows:

1. The project coordinator provides an Excel template well in advance.
2. This template should be filled out by all the consortium partners. The currency used must be EURO and the time worked must be calculated in person-months (PMs). This excel sheet provides the coordinator with valuable information needed for monitoring purposes and management reporting.
3. The coordinator consolidates the provided information and sends recommendations to all the consortium partners separately. As reminder, this financial overview will not be sent to the Commission.

7.2 Periodic report

The Periodic Report must be submitted by the project coordinator within 60 days following the end of each reporting period, which are **RP1 (M1 – M15)**, **RP2 (M16 – M30)** and **RP3 (M31 – M48)**.

This report must include explanations for any deviations (budget and content) from the DoA (GA: Annex 1). The periodic technical report consists of a technical report and a financial report.

7.2.1 Technical reporting

The '**periodic technical report**' will contain:

- i. An explanation of the work carried out by the beneficiaries;
- ii. An overview of the progress towards the objectives of the action, including milestones and deliverables identified in Annex 1. This report must include explanations justifying the differences between work expected to be carried out in accordance with Annex 1 and that actually carried out;
- iii. Summary for publication by the Agency;
- iv. Answers to the 'questionnaire': answers to the questions covering issues related to the action implementation and its impact.

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The coordinator is responsible for the summary and the questionnaire (Part A).

WP leaders compile a report on their WP together with their Task Leaders (Part B) and send it to the project coordinator one month before the deadline. The coordinator consolidates the provided information and sends the complete periodic technical report to the consortium for review. The final approved version will be uploaded to the Participant Portal by the coordinator.

An adapted word version of the Periodic Report Template will be shared with all consortium partners by the project coordinator before each reporting period.

7.2.2 Financial reporting

The **'periodic financial report'** consists of:

- An **'individual financial statement'** (see Annex 4 of GA) from each beneficiary, for the reporting period concerned.

The individual financial statement must detail the eligible costs (actual costs, unit costs and flat-rate costs; see Article 6) for each budget category (see Annex 2 of GA).

The beneficiaries must declare all eligible costs, even if — for actual costs, unit costs and flat-rate costs — they exceed the amounts indicated in the estimated budget (see Annex 2 of GA). Amounts which are not declared in the individual financial 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 GA).

Each beneficiary must certify that:

- the information provided is full, reliable and true;
 - the costs declared are eligible (see Article 6 of GA);
 - the costs can be substantiated by adequate records and supporting documentation (see Article 18 of GA) that will be produced upon request (see Article 17 of GA) or in the context of checks, reviews, audits and investigations (see Article 22 of GA), and
 - for the last reporting period: that all the receipts have been declared (see Article 5.3.3 of GA);
- An **explanation of the use of resources** and the information on subcontracting (see Article 13 of GA) and in-kind contributions provided by third parties (see Articles 11 and 12) from each beneficiary, for the reporting period concerned;
 - A **'periodic summary financial statement'** will be created automatically by the electronic exchange system, consolidating the individual financial statements of the partners, including (except for the last reporting period) the request for interim payment.

The F-Sign of each partner will be able to complete online their own Financial Statement including the explanations on the use of resources (also for their third parties). The

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project coordinator will have a final check on the statements and submit electronically to the EC.

7.2.2.1 Budget

The ATHENA budget includes the planned and estimated eligible costs, broken down by beneficiary and budget category. When reporting, actual costs must be reported (and not budgeted ones).

The project budget information is visible on the Participant Portal and within the GA (Estimated budget for the action). Its categories are listed in the GA (see Article 6.2), being these:

- A. Direct personnel costs:
 - Costs for employees (or equivalent);
 - Costs for natural persons working under a direct contract;
 - Costs of personnel seconded by a third party against payment;
 - Costs of SME owners who do not receive a salary;
 - Costs of beneficiaries that are natural persons not receiving a salary.
- B. Direct costs of subcontracting.
- C. Other direct costs:
 - Travel costs and related subsistence allowances;
 - Depreciation costs of equipment, infrastructure or other assets;
 - Costs of other goods and services;
 - Capitalized and operating costs of 'large research infrastructure';
 - Costs of internally invoiced goods and services directly used for the action.
- D. Indirect costs.

7.3 Final report

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

The final report will include the following:

- A '**final technical report**' with a summary for publication containing:
 - i. An overview of the results and their exploitation and dissemination.
 - ii. The conclusions on the action.
 - iii. The socio-economic impact of the action.
- 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 including the request for payment of the balance.

7.4 Reporting calendar

The Consortium should respect the following deadlines for reporting:

Table 9. Reporting calendar

Official reporting (to EC)			
	Reporting period	Submission date	Review
Periodic Report 1	M1 – M15	M17 (June 2022)	M18 (July 2022)
Periodic Report 2	M16 – M30	M32 (September 2023)	M33 (October 2023)
Final Report	M31 – M48	M50 (March 2025)	tbd
Internal reporting			
	Reporting period	Submission date	Review
Internal Periodic Report 1	M1 – M15	M10 (November 2021)	NA
Internal Periodic Report 2	M16 – M30	M25 (February 2023)	NA
Final Internal Report	M31 – M48	M42 (July 2024)	NA

7.5 Keeping records – Supporting documentation

The ATHENA beneficiaries must keep records and other supporting documentation for a period of five years in order to prove the proper implementation of the action and the costs declared as eligible.

They must make them available upon request (see Article 17 of GA) or in the context of checks, reviews, audits or investigations (see Article 22 of GA).

If there are on-going checks, reviews, audits, investigations, litigation or other pursuits of claims under the Agreement (including the extension of findings; see Article 22 of GA), the beneficiaries must keep the records and other supporting documentation until the end of these procedures.

The beneficiaries must keep the original documents. Digital and digitalised documents are considered originals if they are authorised by the applicable national law. The Commission may accept non-original documents if it considers that they offer a comparable level of assurance.

7.5.1 Records and other supporting documentation for the costs declared

The beneficiaries must keep the records and documentation supporting the costs declared, in particular the following:

- a) For **actual costs**: adequate records and other supporting documentation to prove the costs declared, such as contracts, subcontracts, invoices and accounting records. In addition, the beneficiaries' usual cost accounting practices and internal control procedures must enable direct reconciliation between the amounts declared, the amounts recorded in their accounts and the amounts stated in the supporting documentation;
- b) For **unit costs**: adequate records and other supporting documentation to prove the number of units declared. Beneficiaries do not need to identify the actual eligible costs covered or to keep or provide supporting documentation (such as accounting statements) to prove the amount per unit.

In addition, **for direct personnel costs declared as unit costs calculated in accordance with the beneficiary's usual cost accounting practices**, the beneficiaries must keep adequate records and documentation to prove that the cost accounting practices used comply with the conditions set out in GA Article 6.2, Point A.

The beneficiaries and linked third parties may submit to the Commission, for approval, a certificate (drawn up in accordance with Annex 6) stating that their usual cost accounting practices comply with these conditions (**'certificate on the methodology'**). If the certificate is approved, costs declared in line with this methodology will not be challenged subsequently, unless the beneficiaries have concealed information for the purpose of the approval.

- c) For **flat-rate costs**: adequate records and other supporting documentation to prove the eligibility of the costs to which the flat-rate is applied. The beneficiaries do not need to identify the costs covered or provide supporting documentation (such as accounting statements) to prove the amount declared at a flat-rate.

7.5.2 Time recording

For **personnel costs** (declared as actual costs or on the basis of unit costs), the beneficiaries must keep **time records** for the number of hours declared.

The time records must be in writing, dated and signed at least monthly by the person working for the action and his/her supervisor. If the time recording system is computer-based, the signatures may be electronic (i.e. linking the electronic identity data (e.g. a password and user name) to the electronic validation data, with a documented and secure process for managing user rights and an auditable log of all electronic transactions).

Time records should include, as a minimum:

- the title and number of the action, as specified in the GA;
- the beneficiary's full name, as specified in the GA;
- the full name, date and signature of the person working for the action;
- the number of hours worked for the action in the period covered by the time record;
- the supervisor's full name and signature;
- a reference to the action tasks or work packages of Annex 1, to which the person has contributed by the reported working hours.

Information included in time-sheets must match records of annual leave, sick leave, other leaves and work-related travel.

In the absence of reliable time records of the hours worked on the action, the Agency may accept alternative evidence supporting the number of hours declared, if it considers that it offers an adequate level of assurance.

As an exception, for **persons working exclusively on the action**, there is no need to keep time records, if the beneficiary signs a **declaration** confirming that the persons concerned have worked exclusively on the action.

A template for time registration is available in the ATHENA SharePoint, within the folder *'Reporting'*.

8 Payments

The payment schedule is defined in Article 21 of GA. There is no payment carried out by the EC directly to each partner. The payments will be made directly to the coordinator who will distribute them as soon as possible among the ATHENA beneficiaries. The following type of payments are foreseen:

1. One **pre-financing payment** at the start of the project (48.33% of EU contribution). It remains the property of the EU until the payment of the balance.
2. **Interim payments** following the approval of the periodic reports. These payments are issued for up to 90% of EU contribution.
3. **Payment of the balance**, reimbursing the remaining part of the eligible costs incurred by the beneficiaries for the implementation of the action. This final payment will be transferred after the approval of the final report and consists of the difference between the calculated EU contribution (on the basis of the eligible costs) minus the amounts already paid.

9 Communication

9.1 Internal communication

9.1.1 E-mail

E-mail is the standard means of communication to exchange information among the ATHENA consortium. As internal rule, it is recommended that all e-mails concerning ATHENA will include the subject starting with the tag 'ATHENA', as in the following scheme:

Subject: ATHENA – [Title of the subject] (as example: *ATHENA – Kick-off meeting minutes*).

A contact list including the members of the ATHENA consortium involved in the project and broke down by beneficiary and their involvement in each WP is shared at the ATHENA SharePoint.

It is required to include the Coordination team in all WP1 and other project coordination e-mail communications.

There have been created three project mailing lists:

- ATHENA General Assembly: athena.ga@consulta-europa.com
- ATHENA Steering Committee: athena.sc@consulta-europa.com
- ATHENA Advisory Board. athena.ab@consulta-europa.com

Requests for changes in the mailing lists should be addressed to Cira Mendoza, Consulta Europa.

9.1.2 Internal communication platform - ATHENA SharePoint

A SharePoint repository has been set up as an internal communication site to host the work developed by the consortium. All members of the consortium have been provided access to the repository.

The SharePoint has initially been organized in the following sections:

- Communication & Dissemination
- Contact details
- Contracts
- Deliverables
- Meetings
- Reading room
- Reporting
- Sister projects
- Templates
- Work Packages

This set up will be updated according to the project needs and development. Required changes to this structure can be sent to Cira Mendoza, CE.

9.2 External communication

External communication refers to communication towards parties outside the consortium: EU RPOs and RFOS, ATHENA networks, target group, stakeholder, etc.

‘WP7 – Dissemination and communication’ will facilitate the external communication of ATHENA partners. The ATHENA partner responsible of WP7 is FRCT (Lina Silveira). The external communication and dissemination actions undertaken under ATHENA framework should be communicated to this partner responsible for the project communication, providing information about:

- In case, name of the person who undertook the action.
- Date and place of the action.
- Supporting information and documents as texts, photos, videos, links or any material used in the action.
- Contact person.

The WP7 responsible partner has shared at the ATHENA SharePoint a file aimed at tracking records on the communication and dissemination actions made by project partners. Partners are invited to update the file on a continuous basis.

Further information on external communication will be available in ‘D7.1 Dissemination and Communication Strategy’.

9.2.1 General requirements

According to Article 38 of the GA, ATHENA beneficiaries must promote the action and its results. In addition, unless it goes against their legitimate interests, each beneficiary must disseminate its results as soon as possible (see Article 29 of GA).

Unless the Agency requests or agrees otherwise or unless it is impossible, any dissemination action (in any form including electronic) must:

- display the EU emblem (when displayed together with another logo, the EU emblem must have appropriate prominence):



- include the following text:
“This project has received funding from the European Union’s Horizon 2020 research and innovation programme under grant agreement No 101006416.

The opinions expressed in this document reflect only the author’s view and in no way reflect the European Commission’s opinions. The European Commission is not responsible for any use that may be made of the information it contains”.

10 Links to relevant documents

- Participant portal [\[LINK\]](#)
- H2020 – Annotated Model Grant Agreement [\[LINK\]](#)
- H2020 Online Manual [\[LINK\]](#)
- National Contact Point [\[LINK\]](#)
- H2020 Reference documents [\[LINK\]](#)
- Questions? Research Enquiry Services [\[LINK\]](#)