



Grant Agreement No.: 825354
Call: H2020-ICT-2018-2020
Topic: ICT-24-2018-2019
Type of action: CSA

NGI4ALL

D5.1 QUALITY ASSURANCE PLAN

Revision: v.0.4

Work package	WP5
Task	Task 5.1
Due date	31/03/2019
Submission date	10/05/2019
Deliverable lead	Martel
Version	0.4
Authors	Martel
Reviewers	Fbox, Tipik

Abstract	<p>The purpose of the deliverable Project Handbook, Quality Plan & Risk Management, which is essentially the Quality Assurance Plan (QAP) of the NGI4ALL project, is to provide a single point of reference on the quality that will be governed during the course of the project. The deliverable at hand defines the project organisation, roles and responsibilities with emphasis on the quality control and quality assurance activities that will be carried out. It describes how the project will execute its day-to-day activities from a quality perspective, and ensures that standards, processes, and procedures are defined so that their execution is continuously monitored and improved. This deliverable defines all the necessary mechanisms and structures for the</p>
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	management and administrative coordination of the project with emphasis on the governance, change management, communication plan, project calendar, stages, milestones, and reporting roles and responsibilities for all the partners is also made.
Keywords	Project Management Plan, change management, scope management, cost management, cost baseline, schedule baseline, schedule management, effort, budget, indicators, quality management, risk assessment, communication management, communication matrix, software management, guidance, administration

Document Revision History

Version	Date	Description of change	List of contributor(s)
v0.1	15/01/2018	1st version of the template	Martel
v0.2	29.03.2019	Full version	Martel
v0.3	07.05.2019	Update of the established communication tools Review	Martel, Tipik, Fbox
V0.4	10.05.2019	Review and preparation for submission	Martel

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Nature of the deliverable:		R
Dissemination Level		
PU	Public, fully open, e.g. web	
CL	Classified, information as referred to in Commission Decision 2001/844/EC	
CO	Confidential to HUB4NGI project and Commission Services	✓



EXECUTIVE SUMMARY

About the EXECUTIVE SUMMARY:

The purpose of the Quality Assurance Plan (QAP) of the NGI4ALL project, is to provide a single point of reference on the quality that will be governed during the course of the project. The deliverable at hand defines the project organisation, roles and responsibilities with emphasis on the quality control and quality assurance activities that will be carried out. It describes how the project will execute its day-to-day activities from a quality perspective, and ensures that standards, processes, and procedures are defined so that their execution is continuously monitored and improved. This deliverable defines all the necessary mechanisms and structures for the management and administrative coordination of the project with emphasis on the governance, change management, communication plan, stages, milestones, and reporting roles and responsibilities for all the partners is also made.



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ACRONYMS AND DEFINITIONS

ACRONYMS

AG	Administration Group
CA	Consortium Agreement
CO	Coordinator; except when referring to a deliverable, in which case it refers to “Confidential”, i.e. only for members of the consortium (including EC Services)
CR	Change Request
D	Demonstrator
DCM	Dissemination and Communication Manager
DL	Deliverable Leader
DMS	Document Management System
DoA	Description of Action
Dx	Deliverable (where x defines the deliverable identification number e.g. D1.1.1)
EC	European Commission
ECAS	European Commission Authentication Service
EU	European Union
FM	Financial Manager
GA	General Assembly
GRA	Grant Agreement
IEM	Innovation & Exploitation Manager
KPI	Key Performance Indicator
MSx	project Milestone (where x defines a project milestone, e.g. MS3)
Mx	Month (where x defines a project month, e.g. M10)
MoM	Minutes of Meeting
O	Other
P	Prototype
PC	Project Coordinator partner (Martel)
PM	Person Month (a unit to count workload)
PMB	Project Management Board
PO	Project Officer
PP	Restricted to other programme participants (including the Commission Services)
PPM	Partner Project Manager
PSTC	Project Scientific & Technical Committee
PU	Public
QA	Quality Assurance
QAP	Quality Assurance Plan



QM	QA Manager
R	Report
RE	Restricted to a group specified by the consortium (including Commission Services)
R&D&I	Research & Innovation & Development
RQM	Risk and Quality Manager
SM	Scientific Manager
TL	Task Leader
TMT	Technical Management Team
WP	Work Package
WPL	Work Package Leader
WPS	Work Package Structure

DEFINITIONS

Beneficiary	EC term used to designate the legal entity which has signed the Grant Agreement. This term is often substituted by the common language term 'partner'.
Consortium	Group of beneficiaries that have signed the Consortium Agreement and the Grant Agreement (either directly as Coordinator or by accession through the Form A).
Consortium Agreement	Contractual document signed by all the beneficiaries (and not the EC), explaining how the Consortium is managed and works together.
Deliverable Leader	Responsible for ensuring that the content of the deliverable meets the required expectations, both from a contractual point of view and in terms of usage within the project. Is also responsible for ensuring that the deliverable follows the deliverable process and is delivered on time.
Description of Action	Annex 1 to the Grant Agreement. It contains information on the work packages, deliverables, milestones, resources and costs of the beneficiaries, as well as a text with a detailed description of the action. The DoA is made of Part A (structured data collected in web forms and workplan tables) and Part B (text document describing the action elements).
Dissemination	EC term for communication of information to a wide audience.
Foreground	The results, including information, whether they can be protected or not, which are generated under the project. Such results include rights related to copyright, design rights, patent rights etc.
Grant Agreement	Contractual document which defines the contractual scope of the NGI4ALL project. It is signed between the EC and the beneficiaries.
Third party	Any legal entity which does not sign the EC Grant Agreement. A subcontractor is a type of third party, but not the only one. In special circumstances, the GRA accepts third parties whose costs may be eligible. Third parties are specified in the DoA, GRA (Article 14) and CA.



1 INTRODUCTION

1.1 DOCUMENT SCOPE

The purpose of this deliverable is to provide a single point of reference on the management and quality that will be governed during the course of the project. It defines the project organisation, roles and responsibilities with emphasis on the quality control and quality assurance activities that will be carried out. It describes how the project will execute its day-to-day activities from a quality perspective, and ensures that standards, processes, and procedures are defined, and their execution is continuously monitored and improved. A reference to all the necessary mechanisms and structures for the management and administrative coordination of the project capitalising on the governance, change management, communication plan, project calendar, stages, milestones, and reporting roles and responsibilities for all the partners is also made.

1.2 DOCUMENT STRUCTURE

This document is comprised of the following chapters:

Chapter 1 presents an introduction to the document.

Chapter 2 offers further project information, to provide the context for this document.

Chapter 3 explains the overall strategy and approach towards managing the project including the management structure, partner roles and responsibilities, procedures, baselines, milestones and indicators.

Chapter 4 establishes the baseline performance of NGI4ALL in terms of schedule, resources, cost and overall quality.

Chapter 5 presents the way the project will handle changes to the established plans and baselines.

Chapter 6 presents the communication flows, instruments and guidelines to the project.

Chapter 7 describes in brief the way the coordination team intends to manage costs and efforts. The two are placed in the same procedure as they are closely linked.

Chapter 8 sets the policy for procurement in the project.

Chapter 9 explains in brief the process of managing project scope.

Chapter 10 outlines the management of project schedule.

Chapter 11 documents the processes and techniques for the evaluation and control of potential project risks, focusing on their precautionary diagnosis and handling.



2 NGI4ALL CONTEXT

2.1 PROJECT SCOPE AND OBJECTIVES

The main mission of the NGI4ALL is to contribute to optimize the NGI brand equity, through the establishment of the **NGI Outreach Office (NOO)** as a **highly-qualified and well-positioned team of professionals to support and coordinate the definition and execution of the communication programme, strategy, branding and marketing activities**. NGI4ALL's core idea is to give a major impulse to the whole NGI community growth and NGI initiative to play a prominent role within the Digital Transformation context. This will be achieved by providing and animating targeted and professional communication and dissemination services, including a rich and dynamic set of activities, tools, contents, processes and collaterals. **The NOO** will be structured as a 360-communication agency at the service of the whole NGI community, including researchers, innovators and policy makers, with the overall ambition to also reach civic society players and people at large. The NOO will improve promotion of the NGI, facilitate exchange and communication of know-how and NGI projects' activities and results, coordinate strategic marketing decisions and plans across the whole programme, foster the establishment of liaisons with relevant projects/initiatives, in EU and beyond, while boosting engagement by stimulating community building.



NGI4ALL will create a strong, fresh and persistent NGI brand at the core of a new approach to run communication and marketing for the NGI programme, which will generate greater resonance and impact in the scientific community, in the media, towards policy makers and the public. The NGI Outreach Office will ensure one voice towards the world enabling each action (from different organisations and projects) to flow in an orchestrated manner even when addressing different audiences. The ambition is to make sure the NGI storytelling will be harmonised and curated contents will ensure conveying the most suitable messages depending on specific target groups.

NGI4ALL will indeed support the various NGI-driven initiatives and projects by offering them concrete opportunities for **being coached on marketing & communication** – from ideas to actions and tools – to help them better strategize, execute and coordinate communication efforts and effective promotion of their work and results, as a typical CSA would do. Moreover, NGI4ALL will also ensure that the NGI programme continues to grow as a unique initiative able to engage all R&D&I actors, including young (and older) researchers, small, medium and large enterprises, start-ups, innovation clusters and incubators, as well as policy makers and public authorities. This will be crucial in achieving sustainable and wide impact. Towards this, the main objectives of NGI4ALL are the following:

Objective 1 – communicating to support transformation of the NGI in a forward-looking perspective: contributing to define and execute a sound vision and strategy for communication and marketing of the NGI, steering efforts across the whole programme by providing critical and professional guidance, including coaching and training, which can empower the transition of the NGI from the Horizon 2020 FP to the FP9.

Objective 2 – creating a strong identity and establishing credibility and trust with the audience by creating a strong and distinguished brand and ensuring extensive online and offline media presence, which reflects in a consistent way the “reloaded identity” of the NGI. Through a brand that effectively reflects the core values the NGI initiative builds upon, and through inspiring storytelling and well-curated contents, it will be possible to increase its credibility and build a strong reputation, also beyond the ICT context.

Objective 3 – building meaningful dialogues with all relevant stakeholders that will contribute to grow, shape, strengthen and sustain the NGI initiative. By mapping and liaising with relevant initiatives across Europe and assisting the NGI stakeholders in their outreach activities, also thanks to the involvement of highly qualified experts and testimonials, NGI4ALL aims to increase impact and attract fresh blood in the ecosystem – grow the insiders’ community and provide meaning to reach towards the outsider’s world.

Objective 4 – building a strong reputation and global visibility on the human-centric Internet debate, reinforcing the existing roster of stakeholders and gaining additional ones that will contribute to the development of a human Internet by creating the proper technological, political and socio-economic conditions. Via a combination of dedicated online and offline activities through a 360 degrees approach, the aim is to ensure increased impact for all NGI initiatives and broad outreach to people at large.

2.2 WORKPLAN

The NGI4ALL work plan is organised in five work packages whose relations are shown in the pert chart below.

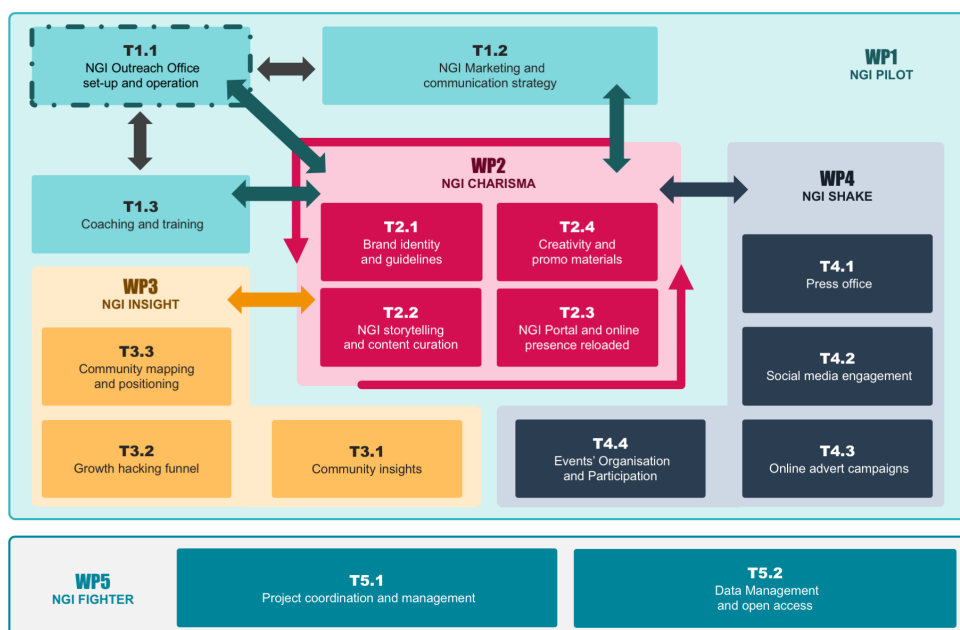


FIGURE 1: NGI4ALL PERT CHART



WP1, NGI PILOT. Strategy and governance will steer communication and marketing across the NGI community for broad reach a large mediatic impact, integrated by dedicated coaching to all NGI stakeholders. Close interaction of WP1 will be ensured with all other WPs so as to align on both strategic and operational aspects necessary to run the NGI Outreach Office effectively.

WP 2, NGI CHARISMA. Branding, identity and online presence reloaded creates a strong identity and establishes credibility and trust by ensuring a distinctive online presence, meaningful contents and distinguished promo materials. It will closely interact with WP1, WP3 and WP4 to establish the NGI identity and personality are reflected in all online and offline messaging.

WP 3, NGI INSIGHT. Providing Meaningful and Actionable Insights invigorates the dialogue with all relevant stakeholders to grow, shape, strengthen and sustain the NGI ecosystem. WP3 interacts with all other WPs and have great exposure to the NGI ecosystem (and not only) reaching out to researchers and innovators at work to build a better Internet of the future.

WP 4, NGI SHAKE. Increasing visibility, reach and impact aims at building a strong reputation and global visibility on the human-centric Internet debate, via a combination of dedicated online and offline activities through a 360 degrees approach. WP4 interacts with all other WPs and have great exposure to the outside media (and not only) audience.

WP 5, NGI FIGHTER – Coordinate, manage and mind the quality under the lead of Martel as experienced EC project coordinators, ensures smooth, non-intrusive, but effective management and coordination of all the project’s activities supervising and coordinating all WPs interactions as needed.

A detailed work package structure is presented in **Annex 1 of the Grant Agreement** within Section 1.3 ‘**Workplan Tables – Detailed Implementation**’ and more specifically under Section 1.3.3 **WT3: ‘Work package description**’ of the DoA.

2.3 MILESTONES

Project milestones are presented in **Annex 1 of the Grant Agreement**, i.e. in the **Description of the Action (DoA)**. The complete milestone table is provided within Section 1.3.4 **WT4: ‘List of milestones**’ of the DoA, but also in the following table.

#	Milestone name	Lead Beneficiary	Due date	Means of verification
MS1	NGI4ALL project kicked off and NGI Outreach Office established	Martel	M01	The first project meeting couple with NOO launch has taken place
MS2	NGI rebranded and initial strategy defined	Martel	M04	The NGI Brand Toolkit and guidelines (D2.1), the release of the new NGI Communication & Marketing Strategy and Plan, (D1.1)
MS3	NGI Community Platform launched	Fbox	M04	The NGI Community Platform is launched and the growth hacking plan strategy is defined (D3.1)



#	Milestone name	Lead Beneficiary	Due date	Means of verification
MS4	NGI Online presence reloaded	Tipik	M06	The rebranded version of the NGI Web Portal, NGI Online Map and social media profiles reloaded (D2.2)
MS5	NGI communications checkpoint – the goods and the bads after year 1	Martel	M12	Check and assessment of the lessons learned in year 1 for updates in strategic activities via D1.2.1, D2.3.1, D3.2.1, D3.3.1, D4.1.2, D4.5.1
MS6	1st project review (typically at month 18 for 3 years projects)	Martel	M18	Successful completion of the 1st year project review and year 1 Periodic Progress report accepted
MS7	NGI communications checkpoint – the goods and the bads after year 2	Martel	M24	Check and assessment of the lessons learned in year 2 for updates in strategic activities via D1.2.2, D2.3.2, D3.2.2, D3.3.2, D4.1.3, D4.5.2
MS8	Handover strategy	Martel	M34	NGI Communication & Marketing Strategy updated and handover strategy proposed (D1.1.3)
MS9	Final project review	Martel	M36	Successful completion of the final project review and year 3 Periodic Progress report accepted

TABLE 1 : NGI4ALL LIST OF MILESTONES

2.4 DELIVERABLES

A detailed deliverable list is presented in **Annex 1 of the Grant Agreement** within Section **1.3.2 WT2: 'List of Deliverables'** of the DoA, but also here:

No.	Deliverable name	WP No.	Lead Beneficiary	Type	Diss. level	Due date
D1.1.1	NGI Marketing and Communication Strategy and Plan	1	Martel	R	PU	M04
D1.1.2	NGI Marketing and Communication Strategy and Plan	1	Martel	R	PU	M18
D1.1.3	NGI Marketing and Communication Strategy and Plan	1	Martel	R	PU	M34
D1.2.1	NGI Comms coaching report	1	Tipik	R	PU	M12
D1.2.2	NGI Comms coaching report	1	Fbox	R	PU	M24
D1.2.3	NGI Comms coaching report	1	Tipik	R	PU	M36
D2.1	The NGI Brand Toolkit and Guidelines	2	Tipik	DEC, R	PU	M04
D2.2	NGI Online Presence Reloaded	2	Martel	DEC	PU	M06
D2.3.1	NGI CHARISMA Activities Report	2	Martel	PU	PU	M12



No.	Deliverable name	WP No.	Lead Beneficiary	Type	Diss. level	Due date
D2.3.2	NGI CHARISMA Activities Report	2	Tipik	PU	PU	M18
D2.3.3	NGI CHARISMA Activities Report	2	Tipik	PU	PU	M36
D3.1	The NGI community platform and growth hacking plan	3	Fbox	DEC, R	PU	M04
D3.2.1	Growth hacking activities and NGI Ambassadors Programme report	3	Fbox	R	PU	M12
D3.2.2	Growth hacking activities and NGI Ambassadors Programme report	3	Fbox	R	PU	M24
D3.2.3	Growth hacking activities and NGI Ambassadors Programme report	3	Fbox	R	PU	M36
D3.3.1	NGI community demographics and evolution	3	Martel	R	PU	M12
D3.3.2	NGI community demographics and evolution	3	Martel	R	PU	M24
D3.3.3	NGI community demographics and evolution	3	Martel	R	PU	M36
D4.1	Media landscape	4	Tipik	R	PU	M12
D4.2	NGI Media database	4	Tipik	DEC	CO	M12
D4.3.1	Annual media and press coverage report	4	Tipik	R	PU	M12
D4.3.2	Annual media and press coverage report	4	Tipik	R	PU	M24
D4.3.3	Annual media and press coverage report	4	Tipik	R	PU	M36
D5.1	Quality Assurance Plan	5	Martel	R	CO	M03
D5.2.1	Data Management Plan	5	Fbox	R	CO	M06
D5.2.2	Data Management Plan	5	Fbox	R	CO	M18
D5.2.3	Data Management Plan	5	Fbox	R	CO	M36

TABLE 2 : NGI4ALL LIST OF DELIVERABLES



3 PROJECT MANAGEMENT APPROACH

3.1 OVERALL MANAGEMENT STRATEGY

The NGI4ALL project management description is found in **Annex 1 of the Grant Agreement (DoA)**, as part of the contract with the European Commission, along with the project scope and baselines. The **Consortium Agreement** is based on the contract with the European Commission and is another legal instrument establishing the fundamental rights and obligations in the relationships **between partners**. In the metaphor of project management being a building, the Annex 1 of the Grant Agreement (DoA) is the foundation, whereas the Consortium Agreement is the skeleton. All other parts of project management rely on these two. **Quality** and **risk management** are the external walls. They permeate all activities of the project and act as safeguards. Quality is assured and risks are assessed for both project products and project management practices. All activities end with the communication of decisions, changes and actions to consortium members and the European Commission. These are the activities that bound project management for NGI4ALL as it is shown in the figure below.

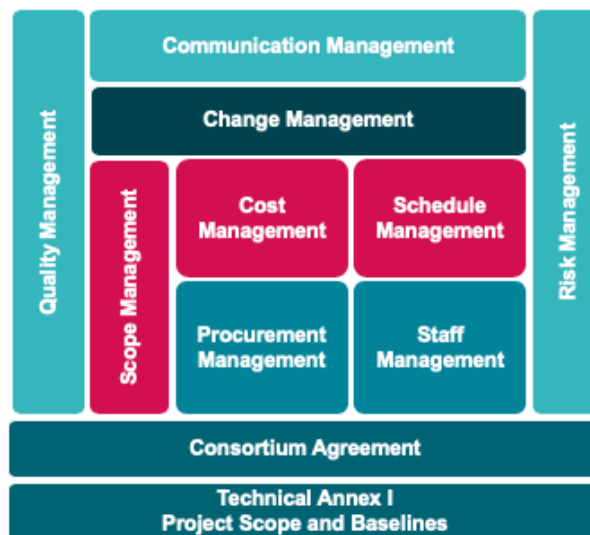


FIGURE 2: NGI4ALL PROJECT MANAGEMENT ARCHITECTURE

The core activities to ensure the project stays on track are the **scope, cost and schedule management**. They keep the project in line with what the Annex 1 of the DoA prescribes that the project should do, cost and how long it should take to accomplish its objectives respectively. **Procurement management** describes how to handle purchases needed to execute the project at a partner level, while **staff management** defines the needs in terms of people, their roles and who is going to fill those roles in terms of their expertise. The core activities of project management lead to decisions and changes in both the work of the project and its management but cannot impose practises or plans to partners without their approval. Core activities are managed through **change management**, which feeds into **communications management** ensuring that information reaches all appropriate audiences. The **quality management** contributes in establishing the relevant to the project quality control and quality assurance activities for ensuring an efficient collaboration among the consortium partners and delivery of project results; whereas the **risk management** is necessary for providing the process and techniques for the evaluation and control of potential project risks, focusing on their precautionary diagnosis and handling.

3.2 PROJECT MANAGEMENT STRUCTURE AND APPROACH

Overall, project management encompasses operational, technical, financial and administrative co-ordination as well as the supervision of various activities within the project. To manage a project of the complexity of NGI4ALL, a professional and flexible management structure is vital. Transparent decision-making processes are required to both encourage project development and foster confidence amongst the project consortium. Conflict management should be focused on prevention and be apparent from project commencement and contingency plans have to be derived. Clear and pragmatic decision-making and communication pathways and prompt reporting mechanisms are necessary. For this reason, each consortium partner will nominate a **Management Representative** (often referred to as partner project manager or primary contact). If necessary, one person can fulfil more than one role.

Furthermore, the **Project Coordinator** (Martel) will nominate the **Coordinator**, the **Financial Manager**, the **Project Manager**, as well as **NOO Account Manager** that they constitute the Project Management and Coordination Team, as shown in the figure below.



FIGURE 3: PROJECT MANAGEMENT AND COORDINATION TEAM

To tackle its coordination and technical goals, NGI4ALL is organized in 5 Work Packages (WPs). WPs are further divided into WP Tasks. Therefore, a **Work Package Leader** per WP and a **Task Leader** per Task are nominated, according to the project plan. WP leaders and Task leaders are responsible for coordinating efforts in the WP and Task level accordingly.

The NGI4ALL project management takes into account all the partners' interests and expertise, in order to ensure an effective project's time-plan and execution. The main objectives of the project management that have been defined are to:

- ➔ Ensure the effective administrative, financial and technical management of the project.
- ➔ Identify quantifiable and targeted measurement criteria of project progress and clear milestones.
- ➔ Ensure that the project results are achieved within the proposed resources (time, cost, resources).
- ➔ Apply quality assurance measures to all project related procedures and products,
- ➔ Provide successful dissemination of project's results and apply efficient exploitation activities and finally.
- ➔ Strengthen the co-operation of all project partners and external participants.

The figure below illustrates the coherent and highly structured management scheme that has been designed for the effective management and co-ordination of the NGI4ALL project.

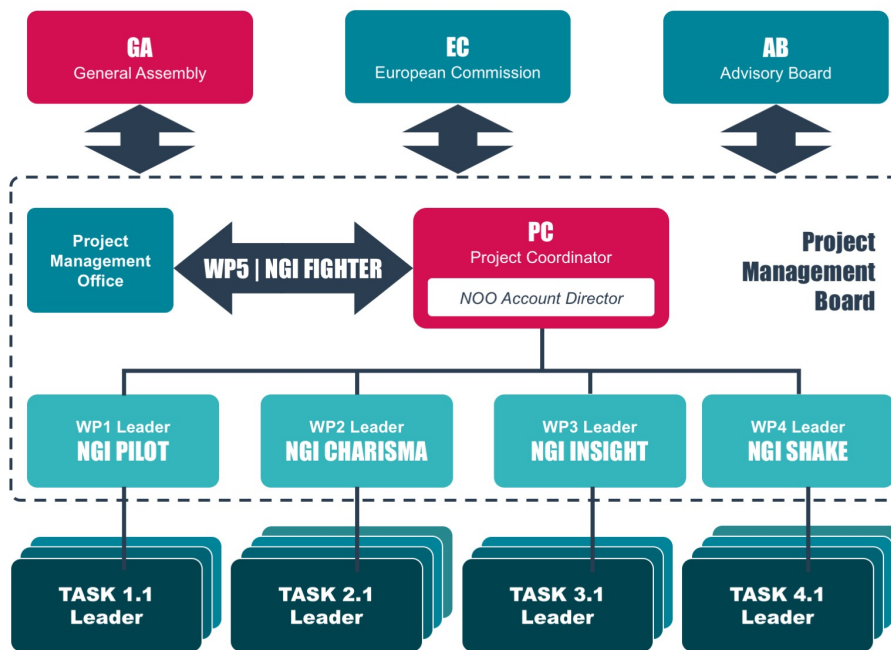


FIGURE 4: NGI4ALL GOVERNANCE STRUCTURE

The NGI4ALL hierarchical organization positioned above is comprised of the:

The Project Management Board (PMP) gathers the PC, and the work package leaders. It is chaired by the CO and is responsible for the day-to-day running of the project. This includes ensuring a clear and coherent technical view across the project, evaluating progress against the milestones according to the project plan, revising the project plan when necessary, taking final responsibility for approving deliverables and handling liaisons external to the project.

The General Assembly (GA) that will comprise one representative of each partner in the NGI4ALL consortium will be chaired by the Project Coordinator, with the goal to keep coordination (between partners and with the EC) as simple and as effective as possible.

The Project Management Office (PMO), in charge of Martel, assists the CO in the day to day project management tasks; manages the delivery and the workflow and follow-up on daily administrative and financial duties, being responsible for project progress reporting and financial matters, collecting, checking and consolidating cost reports from partners, distributing payments and keeping financial records; is a permanent contact point for the CO and all the Partners regarding their participation in the project, responding to any relevant requests and maintaining a high level of communication within the Consortium. The PMO will be in constant communication with the CO on the status of the project (new results, new risks, modifications, doubts, etc.).

In this structure, the key project management persons have specific functions:

- ➔ The **Coordinator (CO)** responsible for the overall management, communication, and coordination of the entire research and innovation project.
- ➔ The **Project Manager (PM)** (as member of the Project Management Office) assists the CO in the day to day project management tasks; is a permanent contact point for the CO and all the Partners regarding their participation in the project, responding to any relevant

requests and maintaining a high level of communication within the Consortium. The PM will be in constant communication with the CO on the status of the project (new results, new risks, modifications, doubts, etc.).

- ➔ The **Financial Manager (FM)** (as member of the Project Management Office) manages the delivery and the workflow and follow-up on daily administrative and financial duties, being responsible for project progress and financial reporting matters, collecting, checking and consolidating cost reports from partners, distributing payments and keeping financial records;
- ➔ The **Work Package Leaders (WPLs)** are in charge of co-ordinating work at work package level, making sure that technical objectives and deadlines of the work package are being met.

Each Work Package/Task is led by the partner most competent in the domain concerned as identified within the Annex 1 of the DoA. Work Package leaders and Task leaders are responsible for co-ordinating efforts in the Work-Package and Task level accordingly. Reporting on the successful completion of tasks, progress on deliverables, and on problems, delays and conflicts and proposals for decision making start from the partners involved at the Task level and escalate up to the final decision body that is the **Project Management Board**. Active support will be given and formal controls will be applied to ensure sufficient feedback loops and close, effective, and efficient inter-relation and co-operation of all parties involved, through the quality and risk management, the project management office and the PSTC.

However, the retains the responsibility to intervene at any point of the management structure if the cohesion of the project is threatened. More specifically, in case of:

- ➔ Decisions which have broader project implications and/or involve communication with the Project Officer and contradict the DoA,
- ➔ Delays, costs overruns or other lack of project progress against the objectives described in the DoA,
- ➔ Conflicts, which the Work Package leader is unable to resolve or whose resolution remains elusive for an extended period of time, threatening overall project progress.

Beyond these roles, also the **Deliverable Leader (DL)** is defined. DLs are listed in the table of Section WT2: 'List of Deliverables' in the Annex 1 of the DoA. They are the **ultimate responsible** partners to produce the deliverable for which they are listed as Lead Beneficiary. They **plan and coordinate** the deliverable production process **following the project guidelines** and they are not precluded from contributing to the deliverable. They are responsible for the content of the deliverable including its veracity, quality and technical integrity. DLs report progress of the work to WPL. Each deliverable is assigned **internal reviewers** agreed by the consortium members. The DL is responsible to incorporate the reviewers' comments in the deliverable. Given that the Consortium is consisted by three partners, as Reviewers as considered the partners that are not DLs for the specific deliverable.

Based on the aforementioned, the various project management bodies and roles are further described in the Annex I of DoA.

3.3 ETHICS

Within the course of NGI4ALL project we foresee to especially cater for ethical issues that might arise, i.e. issues of data privacy, potential for infringement of human rights, personal data collection and misuse of technologies developed. The PMB will ensure that each partner strictly adheres to the highest privacy and ethical standards regarding all activities that will be



carried out within the design and functional implementation during the project, making sure that they conform to the legislation regulations in force in the countries where the research will be carried out, as well as to the EC Ethical Legislation.

Regarding data collection, storage, protection, retention and destruction, it is hereby confirmed that these activities will be rigorously implemented in compliance of the privacy and data collection rules and regulations as they are applied nationally and in the EU, as well as with the H2020 rules. Project Scientific & Technical Committee and WP leaders will safeguard the Privacy and Data Protection, as well as Human Data Collection as follows. Data will be:

- ➔ Fairly and lawfully processed
- ➔ Processed for limited purposes
- ➔ Adequate, relevant and not excessive
- ➔ Accurate
- ➔ Not kept longer than necessary
- ➔ Processed in accordance with the data subject's rights
- ➔ Secure
- ➔ Not transferred to countries without adequate protection

About the GDPR: The EU General Data Protection Regulation (GDPR) is a regulation with the intent to strengthen and unify data protection for individuals within the European Union, which replaces the data protection directive (95/46/EC) from 1995¹. The NGI4ALL project pays special attention to fulfil GDPR requirements:

- ➔ Making sure subscribers may easily change or delete their subscription;
- ➔ Making sure there is no pre-checked or automatically pre-filled forms on the websites;
- ➔ Simplifying the language of the forms on the website;
- ➔ Informing visitors on the website to use Cookies;
- ➔ Informing visitors clearly on the website who is the Data Controller of the personal data and what it means;
- ➔ Making sure Privacy Policy on the website is written in words understandable for everyone.

In case any personal data related to the NGI4ALL project is processed by a third party (a Data Processor) a written contract or other legal act will be prepared between a beneficiary (a Data Controller) of the NGI4ALL project and a third party. The contracts will contain: the subject matter and duration of the processing; the nature and purpose of the processing; the type of personal data and categories of data subject; and the obligations and rights of the controller.

¹ http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=uriserv:OJ.L_.2016.119.01.0001.01.ENG&toc=OJ:L:2016:119:TOC



Currently the data owner of the NGI news-list (736 subscribers) managed within the context of the HUB4NGI project is Martel. According to GDPR regulation any other organisation taking over communication, would have to start from the scratch to create a new list with opt-in subscription process governed by the new data owner. Martel is also the data owner of the ngi.eu² website and of the NGI map³ that visually illustrates NGI actors in Europe.

3.4 MANAGEMENT PROCEDURES

Project and quality management activities will ensure the proper implementation of the project plan and the realisation of its objectives. Decisions will normally be taken by the responsible team members based on the work to be performed, as stated in the **Grant Agreement, the Description of the Action (DoA)** and the individual Work Package or Task plans.

During the project, the participating organisations will have to reach an agreement and resolve various technical issues. This agreement/resolution can be reached by informal contact as a first step, followed by official verification by means of e-mail, letter or minutes. Technical issues/conflicts within the given contractual commitments that do not involve alterations in the **Grant Agreement (DoA)**, in budget and in the overall focus will be initially handled on the Work Package basis.

In the event of a project conflict among partners, the participants, with the intervention of the Project Manager if necessary, settle conflicts at the daily management level. If no consensus is achieved the conflict will be resolved by the PMB. Any issues that cannot be set amicably will be set in accordance to the relevant provisions of the Consortium Agreement.

² <https://ngi.eu>

³ <https://map.hub4ngi.eu/map/>



4 PROJECT BASELINES

4.1 INTRODUCTION

The project's baseline is used to measure how performance deviates from the plan and it is defined as the original scope, cost and schedule and must be completely documented before the project execution and control activities are initiated. Of course, the project performance measurement would only be meaningful if an accurate baseline is set. Once the project is initiated, the project's baseline is put under change control to enable the evaluation of any further change and/or impact on the project. In the event where there is a change to the project baseline, the new baseline is redefined as the original plan plus the approved changes. The project scope is defined in Section 2.1 of this document where a reference to the project original cost and schedule is made within this chapter.

In addition, a Section is dedicated to the quality baseline that records the minimum project indicators, which are an important performance management tool for the project to help measure progress in achieving the associated goals and meeting the basic requirements.

4.2 SCHEDULE BASELINE

The **Overall Gantt chart** in SECTION 3.1 '**Gantt Chart**' within Part B of the Description of Action (DoA), presents the schedule baseline of the project.

4.3 RESOURCE CALENDAR

The **resource calendar** indicates the overall envisaged effort resource consumption spend by all Work packages in person-months per month for the whole project duration. This is derived by cumulating the individual planned effort resource spent by each partner at the beginning of the project according to the efforts declared within the .xlsx file used for project scheduling as explained in SECTION 10.2 "**Schedule Management**". Each WP leader is responsible for submitting to the PMO at the beginning of the project their planned efforts for the whole project duration in relation to the Tasks where assigned person months are allocated, and the PO is responsible for maintaining a consolidated version of it for the whole project.

4.4 COST BASELINE

The **cost baseline** concerns the amount of money that the project is predicted to cost and when that money will be used throughout the project lifespan. This is derived according to the:

- ➔ **Project Budget** (as declared in table of Annex 2 of the Grant Agreement: 'Estimated budget for the action')
- ➔ **Effort Allocation** (as declared in table of SECTION WT6: 'Summary of project effort in person-months' in Annex 1 of the Grant Agreement)
- ➔ **Resource Calendar** (described in previous SECTION WT3)

In essence, the cost baseline converts efforts to personnel cost per month, including indirect, other costs and subcontracting expenses. For the calculation of the project cost baseline the same policy as with the definition of the resource calendar described above is applied. In this instance, all consortium partners at the beginning of the project will need to provide the PMO with their **planned expenses per reporting period**, and their average person rate in case this is different from what it is documented in the Annex 1 of the Grant Agreement (DoA). By the end of each reporting period (**every 18 months**), all partners will be requested to provide to the PMB with the actual costs consumed.



4.5 QUALITY BASELINE

Project indicators are an important performance management tool for projects to help measure progress in achieving their goals and meeting requirements, hence, it is important that the chosen success criteria are quantifiable and critical to the success of the project. These indicators are chosen to be direct (no complex calculations), objective, adequate, practical, and reliable. This section provides **performance indicators** for meeting the specific objectives of the project.

The project will be measured against its performance indicators at a number of stages:

- ➔ **the two 18-month project reviews;** and
- ➔ within additional **internal quality reviews, every twelve months**, as intermediate checking point from the official reporting periods.

The results of performance measurement and evaluation (indicators and their values) will be part of the progress reporting to the European Commission.

The baseline **Key Performance Indicators (KPIs)** that have been identified for the purposes of the NGI4ALL project, are detailed in the following table, in agreement with the KPIs included in **SECTIONs 1.1 and 2.2 of Part B of the DoA**. It is mentioned that for some KPIs the targeted values are set either at yearly or project basis (or both).

Category	KPIs	Target	
		per Year	in total (Year 3)
(Diss. and Comm.) Promotional Material	Posters / rolls up created for dissemination / events	2-4	min 6, max 12
	Number of flyers designed	2-6	min 6, max 18
	Number of flyers distributed (online + offline)	>2500	>7500
	Videos published on NGI YouTube	>12	>36
	Videos	5-6	18
	Merchandising	500	1500
(Diss. and Comm.) Social media and professional networking strategy	Members of NGI LinkedIn Group	5% increase	15% increase (from M0)
	Number of new Twitter followers	>800	>2400
	Number of new views in total in YouTube channel	>1500	>3500
	Number of new Facebook followers	>400	>1200
	Number of new Instagram followers	>400	>1200
(Diss. and Comm.) Portal (web site)	Number of visits / unique visitors	>3000	>9000
	Number of pages visited	>5000	>5000
	Average duration of visit	>1'30"	>1'30"
	Number of news published	>30	>90
	Number of file's downloads	>1500	>4500
(Diss. and Comm.) e-Newsletter / News-flashes	Number of newsletters published	4	12
	Number of newflashes	>12	>36
	Size of the target audience	>500	>1500



Category	KPIs	Target	
		per Year	in total (Year 3)
(Diss. and Comm.) White papers / documents / reports	Published white papers, reports, road mapping and/or strategic and/or technical documents	>15	>45
(Diss. and Comm.) Webinars	Number of webinars	3-4	12
(Diss. and Comm.) Press	NGI media database: entries (media and specialist)	200 (in total)	600
	NGI media database: countries	28 (in total)	28
	Press releases	4	12
	Interviews	4	12
	Interviews (some video clips) to the advisory board? 1 x year?	10	30
	Opinion editorial	1	3
	Press briefings	3	9
	Number of publications per year in traditional press	40	120
(Diss. and Comm.) Events Organized	NGI Conference – participants per edition	>300	
	NGI Conference – speakers per edition	12-15	
	NGI Conference - editions	1	3
	NGI Forum – participants per edition	>80	
	NGI Forum – speakers per edition	6-8	
	NGI Forum - editions	1	3
	Press conferences	1	3
Coaching sessions – collocated with inter-CSAs meetings	>3	>9	
(Diss. and Comm.) Attending external events	Number of attended events - with workshops, exhibition, booth, presentations	7-8	min 21, max 24
	Number of key events attended by EACH partner	3-4	min 9, max 12
(Diss. and Comm.) Training sessions	Number of training sessions	3-4	12
(Impact 1) Shape a more human-centric evolution of the Internet	Promotion to third party organizations via Open Calls of ICT-24 RIAs		~210
	Research and innovation players across Europe to reach through all Open Calls		~400
	Online adverts		~20000 clicks
	Appearances per year across press	40 40% in the main stream media, 60% in the thematic / specialized press	120



Category	KPIs	Target	
		per Year	in total (Year 3)
	Populated database of relevant initiatives		150
(Impact 2) Create a European ecosystem of top researchers, hi-tech start-ups and SMEs with the capacity to set the course of Internet evolution	Number of actors signed up in the NGI Community platform		~15000
	Researchers, both academics and corporate, registered to the NGI Community platform		2,000
	Highly competitive start-ups and SMEs registered to the NGI Community Platform		6,000
	Connections established in the NGI Community Platform on one to one basis		2,000
	NGI Interlocutors		>50
	Advisory Board members (Experts)		8
	Influencers engaged as ambassadors		30
(Impact 3) Generate new business opportunities and new Internet companies with maximum growth and impact chances	Number of entities reached by the project with some of the NGI related funding opportunities offered that could accelerate their businesses		10,000
	Number of entities applying to some funding opportunity related to the NGI initiative		4,000
	Number of contacts done using the NGI map as a point of departure		1,000
	Number of connections generated through the matchmaking tool of the platform		2,000
(Impact 4) Global visibility in the media of the debate on a human-centric Internet; citizens' priorities influencing the evolution of the Internet	Close liaisons with the DSI community (digitalsocial.eu)		1
	Clicks via advert campaigns		15,000
	Visibility to citizens		>2 Millions

TABLE 3: NGI4ALL PROJECT KPIS

In addition to these KPIs, special indicators have been also defined for measuring the performance and success of the project management itself (WP5) that are the following:

Indicator description	Target -Period 1	Target – Period 2
Nr. of Deliverables submitted on time	All Deliverables for the period ≤ 1 month delay	All Deliverables for the period ≤ 1 month delay
Reports to the EC delivered on time	Periodic Report within 60 days after the end of Period 1	Periodic Report within 60 days after the end of Period 2
Project review results	Positive	Positive
Partners satisfaction rate	High/Very high	High/Very high
Progress against work plan KPIs	Stay within targets (± 10%)	Stay within targets (± 10%)

TABLE 4: PROJECT MANAGEMETN KPIS



5 CHANGE MANAGEMENT PLAN

5.1 INTRODUCTION

The **Change Management Plan** sets expectations on how the approach to changes will be managed, what defines a change, the purpose and role of the **PMB**, and the overall change control process. All consortium members are expected to submit or request changes to the NGI4ALL project in accordance with this **Change Management Plan** and all requests and submissions will follow the process detailed herein.

5.2 CHANGE MANAGEMENT APPROACH

The **Change Management approach** is not to be confused with the **Change Control Process** which is detailed in Section 5.6. The approach provides the general principles to which the process must adhere. The Change Management approach introduces the following rules:

- ➔ Ensure changes are within scope and beneficial to the project
- ➔ Ensure that all proposed changes are described adequately, reviewed, and agreed upon, so they can be properly implemented and communicated to all consortium members
- ➔ Determine adequately how the change will be implemented
- ➔ Manage the change and its impacts as it is implemented

The **Change Control Process** has been designed to make sure this **approach** is followed for all changes. By using this approach methodology, the NGI4ALL project will prevent unnecessary changes from occurring and focus its resources only on beneficial changes within the project scope.

5.3 DEFINITION OF CHANGE

There are several types of change that may be requested and considered for the NGI4ALL project. Depending on the extent and type of proposed changes, changes to the project documentation (i.e. project contract, internal or external deliverables, reports and other documentation) may be required. Additionally, the communication of these changes may need to include any approved changes into projects plan and ensure all consortium partners are notified. Types of changes include:

Scheduling Changes: changes that will impact the approved project schedule, i.e. schedule baseline. These changes may require fast tracking or re-baselining the schedule depending on the significance of the impact.

Budget Changes: changes that will impact the approved project budget. These changes may require reallocation of budget or may require changes to the cost baseline and a contract amendment. Under any circumstances, no additional overall project funding will be approved.

Effort Changes: changes that will impact the effort allocated to specific tasks. Depending on the size of these changes, they may require a contract amendment. For minor changes to the planned effort allocation partners with the involvement of WP leaders can address these issues between them while keeping the PMB informed.

Scope Changes: changes that are necessary and impact the project scope which may be the result of unforeseen requirements. These changes will be reported and documented in project reports.



Quality Changes: changes that will impact the quality of project deliverables. Depending on the extent of the impact on quality, these changes may require the modification of impact indicators and the contract with the European Commission. These changes may be reported and documented in project deliverables and reports.

All changes must be communicated to the PMB and management team and examined for their impact to scope, budget/effort, schedule and quality.

The CO must ensure that any approved changes are communicated to the consortium partners. Additionally, as changes are approved, the CO must ensure that the changes are captured in the project documentation where necessary and is ultimately responsible for these changes. These document updates must then be communicated to the consortium partners as well.

5.4 CHANGE PROCESS

Project Management Board is the approval body for all change requests pertaining to NGI4ALL. For major changes affecting the contract and/or have overreaching impact to the project, the PMB will put the changes for approval to the European Commission -through the CO- and/or consortium. The PMB reviews all change requests, determines their impacts on the project risk, scope, cost, and schedule, and filters change requests.

As **Change Requests (CR)** are submitted to the TLs and WPLs by the project team members, they rate them and forward to the PMB. The PMB logs the requests in the change log. All change requests will be reviewed during the PMB meetings. For a change request to be approved, all PMB members must vote in favour. For changes impacting the contract, the PMB will consult the European Commission and initiate a contract amendment. In the event more information is needed for a particular change request, the request will be deferred and sent back to the requestor for more information or clarification. If a change is deemed critical, an ad hoc PMB meeting can be called in order to review the change prior to the next scheduled PMB meeting.

5.5 ROLES AND RESPONSIBILITIES

The following are the roles and responsibilities for all change management efforts related to the NGI4ALL project:

Entity	Responsible / Participants	Responsibilities
Coordinator (CO)	<ul style="list-style-type: none"> • Logs received or generated change requests from consortium members • Conducts preliminary cost, schedule, scope analysis of change prior to PMB meetings • Seeks clarification from change requestors on any open issues or concerns • Makes documentation revisions/edits as necessary for all approved changes • Participates on PMB meeting • Maintains the Change Log • Plans, controls and monitors the implementation of approved change requests 	Authority
Project Management Office (PMO)	<ul style="list-style-type: none"> • Conducts preliminary risk and quality analysis if change prior to PMB meeting 	



Entity	Responsible / Participants	Responsibilities
	<ul style="list-style-type: none"> Seeks clarification from change requestors on any open issues or concerns Makes documentation revisions/edits as necessary for all approved changes Participates on PMB meeting Plans the implementation of approved change requests 	
Work Package Leaders (WPL), Task Leaders (TL)	<ul style="list-style-type: none"> Receives and/or generates, filter all change requests from consortium members and inform the CO Conducts preliminary cost, schedule, scope analysis of change prior to PMB meeting Seeks clarification from change requestors on any open issues or concerns Makes documentation revisions/edits as necessary for all approved changes Participates on PMB meeting Plans the implementation of approved change requests 	Assign priority (i.e. emergency or not) and level of impact (i.e. high, medium, low) on each change request
Partners	<ul style="list-style-type: none"> Submit all change requests through the project hierarchy Provide all applicable information and detail Be prepared to address questions regarding any submitted change requests Provide feedback as necessary on impact of proposed changes Implements and tests approved Changes 	
Project Management Board (PMB)	<ul style="list-style-type: none"> Reviews and prioritises all the Change Requests Accepts or Rejects Changes presented by the PMB 	Approves/Rejects Changes provided the CO

TABLE 5: TABLE OF VCHANGE MANAGEMENT ROLES AND RESPONSIBILITIES

5.6 CHANGE CONTROL PROCESS

The PMB has overall responsibility for executing the change management process for each change request. The Change Control Process for the NGI4ALL Project will follow the steps below.

#	Steps	Who	To whom	When	CR Status
1	Identify the need for a change – Change requester will submit a change request via e-mail up the project hierarchy. The e-mail should contain at minimum the following information: <ul style="list-style-type: none"> Description of the cause of the request Description of the change requested Description of the suggested solution Impacts to schedule, budget, effort, scope, risk and quality 	Consortium partner	WPL, TL, PMO	Immediately	Initiated



#	Steps	Who	To whom	When	CR Status
2	Conducts a preliminary analysis on the impact of the change to risk, cost, schedule, quality, risk and scope and seek clarification from team members and the change requestor. The assigned team members (PMO, WPL, TL) will determine its priority (i.e. Emergency or Standard) and impact (i.e. Critical, Significant, Standard) and forward to the CO along with a decision to continue to discuss the request or not.	PMO, WPL, TL	PMB	Immediately	Initiated
3	Logs the change request and decides to forward to the PMB immediately or wait until next PMB meeting.	PMB	PMB	Immediately	Logged
4	The PMB members will conduct a full analysis on the impact of the change to risk, cost, schedule, quality, risk and scope and seek clarification from project partners and the change requestor.	PMB	PMB	As needed	Evaluation
5	The PMB will discuss the proposed change at the next PMB meeting. It will decide whether or not to approve each change request based on the available information or put the issue for discussion with the Consortium. For changes, which require modification of the Technical Annex I DoA, the Consortium agreement will be required.	PMB	-	During PMB Meeting	Approved/ Rejected
6	If a change is approved by the EC, the CO will update and re-baseline project documentation as necessary. S/he will inform all involved parties and monitor the implementation of the change.	CO	PMB, Consortium	As needed	Implementation

TABLE 6: CHANGE CONTROL PROCESS

5.7 CHANGE REQUEST EVALUATION CRITERIA

Change requests are evaluated using the following **priority** and **impact** criteria:

Priority	Description
Emergency	The change request is time critical and an accelerated authorization and planning is required.
Standard/Low	The change request can wait until the next scheduled project management meeting.

TABLE 7: CHANGE REQUEST PRIORITY CRITERIA



Impact	Description
Critical	Presents an extraordinarily high risk which will impact the delivery of the project and/or may require a contract amendment.
Significant	It requires management decision at the level of the PMB and may have broader impact for the project.
Standard / Low	It is presented to the management for informational reasons only. The matter is routine and can be resolved at the WP level.

TABLE 8: CHANGE REQUEST IMPACT CRITERIA



6 COMMUNICATION MANAGEMENT PLAN

6.1 INTRODUCTION

The **Communication Management Plan** sets the communication framework for NGI4ALL project among the Partners and among the Consortium and the EC. It will serve as a guide for communication throughout the life of the project and will be updated as communication requirements change. This plan identifies and defines the roles of NGI4ALL project partners as they pertain to communications. It also includes a communications matrix, which maps the communication requirements of this project, and communication conduct for meetings and other forms of communication. A project team directory is also included to provide contact information for all partners directly involved in the project.

6.2 COMMUNICATION MANAGEMENT APPROACH

The **project management and coordination team** will take a central and proactive role in ensuring effective communication on this project. The communication requirements are documented in the **Communication Matrices** that are presented in Section 6.4. The **Communication Matrices** will be used as the guide for what information to communicate, who is to do the communicating, when to communicate it and to whom to communicate.

Overall information flow within the project will be ensured by the following means / guidelines:

- ➔ Activities like exchange of information, internal technical and business documents (i.e. meeting minutes), technical documentation generated by the project, notifications of relevant new publications, reports from external / bilateral meetings (if any), notifications of the consortium of any updates from the relevant standardisation bodies, are foreseen to occur in electronic format via the project's web based repository as well as by e-mail. For each document upload the consortium will be notified by email.
- ➔ Urgent correspondence over e-mail will be sent with a request for explicit acknowledgement and indicated in the title with "URGENT".
- ➔ Ordinary mail will be used for strictly formal correspondence, i.e. when executive signatures are required.
- ➔ A defined calendar of Telco meetings will be set, in order to ensure the communication among members.

6.3 PROJECT TEAM DIRECTORY

NGI4ALL maintains a listing with **communication information** for all people identified in this communications management plan, available at the **cloud document repository** (Section 6.4). Based on this directory, a mailing list has been created including representatives from all partners: all@ngi4all.eu.

6.4 COMMUNICATION CHANNELS

This section presents several communication matrices with all the types of communication needs, which have been identified in the context of the project such as meetings, reports, reviews etc. In addition, the attributes of each identified type are specified.

The communication requirements from the project stakeholders in terms of the type, level of detail, and format of the information that they need will be analysed and documented. The documents from the Commission or other projects will be circulated as appropriate. For all



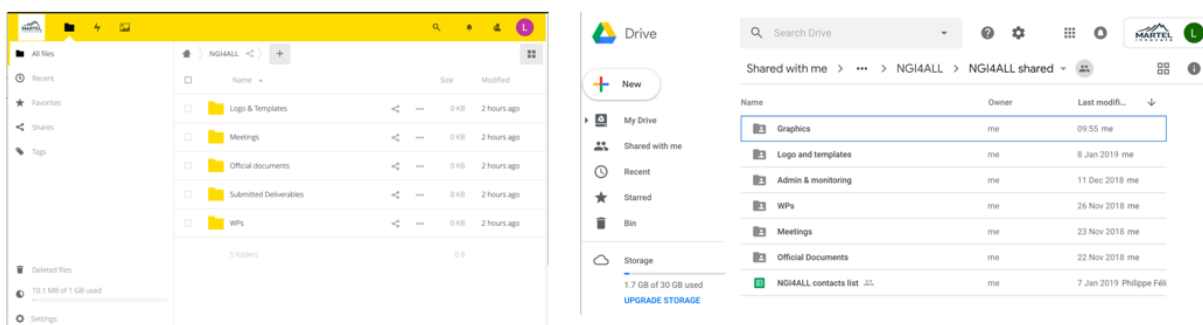
matters within the scope of the project, there will be no limitations on access to information from the Partners and this is also foreseen in the project Consortium Agreement.

External communication: For external communications, the consortium will establish its own website and also communicate with external stakeholders by e-mail, social media accounts and social platforms. For relevant aspects of the work, the partners shall produce high quality presentations and digital material / news items, announcements for publication in the online presence means. These efforts will be pursued throughout the project to raise awareness, ensure high visibility of the project results and objectives, and establish the grounds for knowledge transfer and proper support of the project activities.

Internal communication: The project will use advanced ICT means, like audio and video conferencing (**Skype, GoToMeeting**⁴), instant messaging, electronic mail, e-mailing lists (all@ngi4all.eu), along with thematic ones where necessary, online Docs (**GoogleDocs**)⁵ and Document Management System (DMS) within **cloud infrastructure offered by Martel**⁶. Moreover, the project will hold various physical meetings hosted in turn by Partners. At least two to four plenary (meetings are planned yearly to guarantee consistency and integrity of the project. PMB meetings will be held in this context. Additional workshops or meetings will be held as required by the work plan and the needs identified by the project.

The **GoogleDrive** and **Cloud** tools set up and maintained by Martel, will be utilised for the exchange of working documents and ideas for brainstorming, as well as keeping an action plan of activities. This platform will provide a digital workspace to support the electronic communication and cooperation between project team members. Through this platform, users will have access to a wide range of tools and features necessary for the successful coordination of the team, such as e-mail, on-line forums, dynamic news board, document management etc. The platform will support the team to share project files, exchange and co-edit files, share information and organize discussions across members of the consortium.

The main difference between these two tools is that the first one will be used for collaborative documents, online processing, live monitoring and reporting/tracking documents, since the Cloud will be used for archiving final documents, versioning, official documents and history tracking. The main structure for both is presented in the figures below.

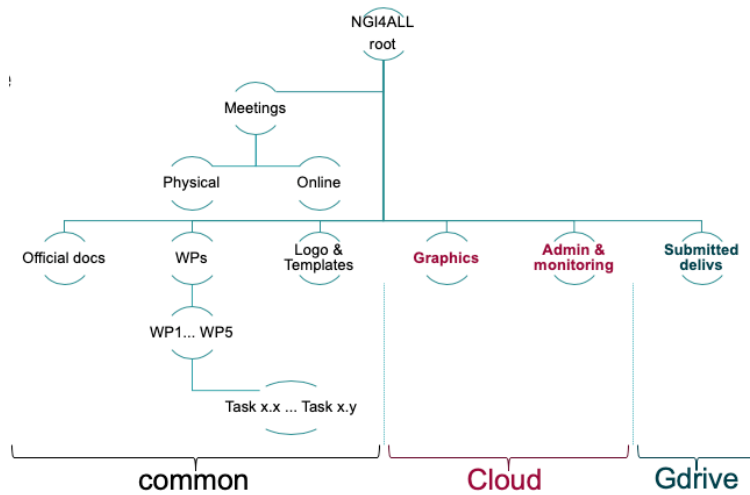


(a) Physical structure of repositories

⁴ <http://www.gotomeeting.com>

⁵ <https://bit.ly/2RWtemm>

⁶ drive.martel-innovate.com



(b) Logical structure of repositories

FIGURE 5: GDRIVE AND CLOUD REPOSITORIES STRUCTURE

For reporting purposes Martel will also provide an online space in the projects.h2020-proposal.eu/ platform. The partners will use the same account for both the Cloud and the Reporting tools.

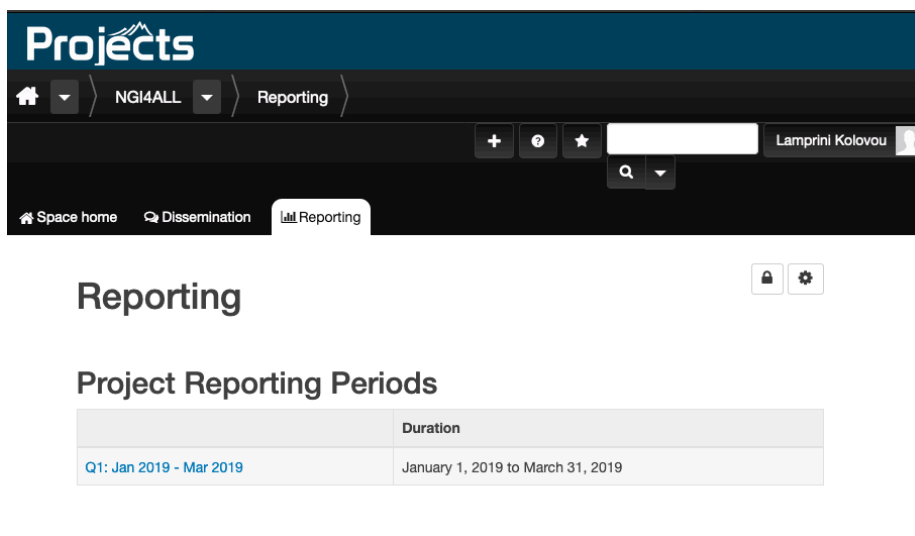


FIGURE 6: REPORTING PLATFORM

6.4.1 Project Meeting Matrix

The following table identifies the communication requirements for project coordination.

Meeting	Objectives	Audience	Frequency / Time	Prior Notice	Chair	Medium / Location	Deliverables
Kick-Off Meeting	Introduce the team, roles and members. Review project history, scope, objectives, planning and management approach.	All project partners	Once M1	1 month	PMB	Face-to-Face	Agenda Meeting presentations Minutes - Action Plan



Meeting	Objectives	Audience	Frequency / Time	Prior Notice	Chair	Medium / Location	Deliverables
Interim Project Review	Evaluation of project results by European Commission.	All project partners, EC	Within 60 days after M18	Upon communication with the EC	EC, PMB	Face-to-Face	All deliverables to be submitted by M18
Physical Plenary Meetings	To direct the project, ensure correct implementation of activities at all project levels, monitor the project's progress, and examine future plans	All project partners	To be held every 4-6 months	2 months	PMB	Face-to-Face	Agenda Meeting presentations Minutes Action Plan
Online plenary meetings			To be held every 2 weeks	Set once for the project lifetime	PMB	Online	Agenda, minutes, action plan
WP meetings	Each WP leader will define the meeting schedule according to the needs and the coordinating actions among the involved parties for the implementation of WP activities.	WP related partners	TBD by the WP leader – needs based	15 days to 1 month	WP participating partners	TBD per case	WP related issues
Ad hoc meetings	Organised in case of an emergency or a conflict resolution as specified in the escalation procedure.	PM	Ad hoc		PM	TBD per case	Agenda Decisions taken Action Plan
Final Project Review	Evaluation of project results by European Commission.	All project partners, EC	Within 60 days after project completion	Upon communication with the EC	EC, PMB	Face to Face	All deliverables to be submitted by M36

TABLE 9: PROJECT MEETING MATRIX

6.4.2 Project Report Matrix

The following table identifies the Project Reporting Matrix.

Meeting	Objectives	Frequency / Time	Leader	Contributors	Output
Interim Progress Reports	18-month reporting progress of project achievements and effort consumption for evaluation by the European Commission.	18 months	CO	All Partners	Delivery of interim project progress report following the structure of the European Commission H2020 Guidance Notes on Project Reporting .doc



Meeting	Objectives	Frequency / Time	Leader	Contributors	Output
					template and the format of the NGI4ALL Deliverable .doc template Upload of Form C (and Certificate of Financial Statement; where needed) to the European Commission Participant Portal (ECAS system).
Deliverables	Concise document reporting the outcomes of the work for the deliverable. For deliverables which are not reports, an executive summary providing information about the deliverable should be provided.	According to 'List of Deliverables' at section WT2: 'List of Deliverables' in the Annex 1 of the DoA	DL	Contributing Partners	Utilising the NGI4ALL Deliverable .docx template.

TABLE 10: PROJECT REPORTING MATRIX

6.5 COMMUNICATION GUIDELINES

6.5.1 Meeting Guidelines

6.5.1.1 Meeting Requests

Meetings will be organized using the **Doodle online service** (<http://www.doodle.com>) for determining the dates most partners are available. The meeting chair is responsible for initiating meeting organization. Meetings will be colocated with other events that the partners participate when possible to minimize expenses and travel time of partners. The strategy is to hold fewer but larger meetings in order to reduce costs.

6.5.1.2 Participants to Meetings

All partners are required to be present to meetings either themselves or through substitute or proxy. Additionally, they must participate in a cooperative manner. During the management meetings the representatives should be in the position to take decisions.

6.5.1.3 Meeting Agenda

For face-to-face meetings, a draft meeting Agenda will be prepared by the meeting chair and distributed 15 business days in advance of the meeting following the template that is available; the meeting agenda is also maintained within the **Gdrive and the Cloud** (the final one). Any partner can add an item to the original agenda by written notification to all the other partners no later than 10 calendar days preceding the meeting (7 calendar days for an extraordinary meeting). During the meeting the consortium can add new items on the agenda following a unanimous decision. Any agenda item requiring a decision from the Consortium body must be identified as such on the agenda. For Telco meetings, the same policy applies with the only exception on the meeting announcement date that may be less than a week.



6.5.1.4 Meeting Minutes

Meeting minutes will be distributed within 10 calendar days following the meeting by the chair; the meeting minutes template is also maintained within the Redmine DMSF and **all meeting minutes of all nature will be uploaded at the document repository**. The minutes (or a corrected version of them) shall be considered as accepted if, within 15 calendar days from distributing them, no partner has sent an objection in writing to the chairperson. All decisions become binding after they have been recorded in the meeting minutes and the meeting minutes are accepted. The following Figure depicts the template for the MoM.

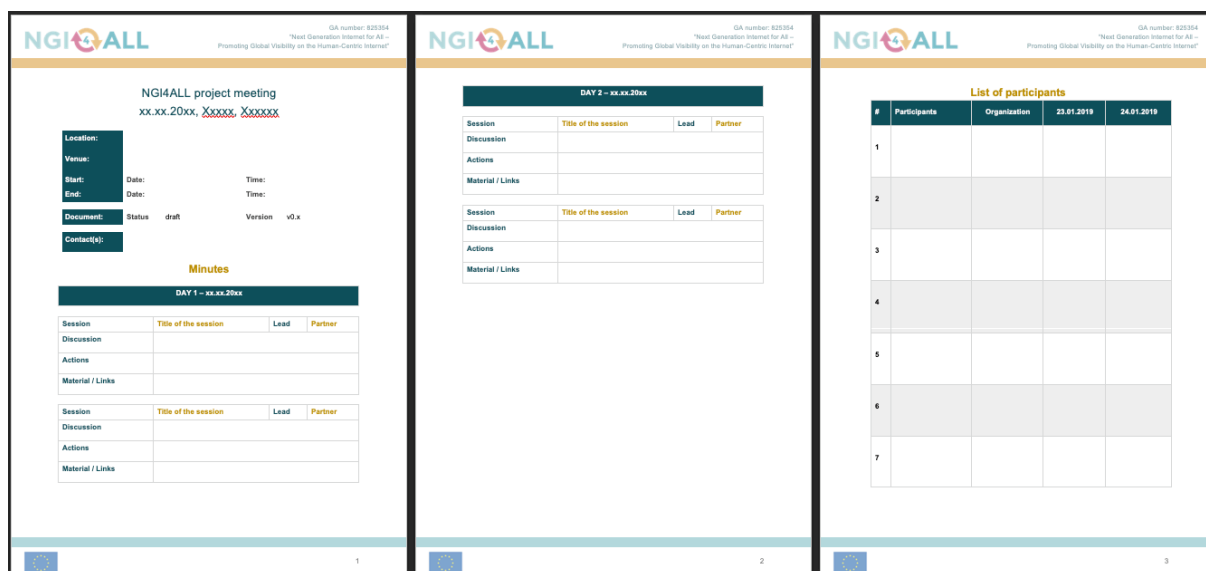


FIGURE 7: MOM TEMPLATE

6.5.1.5 Meeting Chair Person

The Chair Person is responsible for distributing the meeting agenda, facilitating the meeting and distributing the meeting minutes. The Chair Person will ensure that the meeting starts and ends on time and that all presenters adhere to their allocated time frames.

6.5.1.6 Resources for Meetings

Budget for meetings has been allocated and can be found under SECTION 3.4.1 of Part B of the DoA.

6.5.2 Document Formats

The following software formats and version of production tools shall be used in the project:

Data Type	File Format	Production Tool	Version
Word processing	.docx	Microsoft Word	“Word 2016” and later, Google Docs
Tabular spread sheet information and graphs	.xlsx	Microsoft Excel	“Excel 2016” and later, Google Docs
Presentations	.pptx	Microsoft PowerPoint	“PowerPoint 2016” and later, Google Docs
Project Planning	.xlsx	Microsoft Project or Microsoft Excel	“Excel 2016” and later, Google Docs



Data Type	File Format	Production Tool	Version
Images	.jpeg	Any software tools that can produce .jpeg files	
Portable Document Format	.pdf	Any software that can produce .pdf files	
Compressed files	.zip, .rar	Any software that can produce .zip and .rar files	

TABLE 11: ELECTRONIC FILE FORMATS

If the partner responsible for the delivery of any document using one of these format is using a higher version than the one mentioned, then the original version should also be included (preferably through a .zip format).

It is recommended that changes to draft Word documents are made with track changes on, unless the document author requests otherwise.

The partner shall ensure that the images are suitable for printing and, especially for those images to be used for dissemination purposes, that they can be embedded in larger printing.

The use of the PDF format is limited to its capability of obtaining files that are printable with the same layout regardless of the printer. This explicitly excludes the use of any modification capability that can be offered by a PDF capable tool.

6.5.3 Filename Conventions

The partners are expected to exchange several documents between them during the project’s lifetime. In order to facilitate document identification and differentiation between multiple versions of the same document, the following file naming convection should be used for the final version of the documents uploaded in Redmine:

```

NGI4ALL _<document name>_<version>_<date>_<company/person>.extension
<date> : dd.mm.yyyy, e.g. 22.10.2019
<document name> short (3-4 words) document name, e.g. D1.1 Project Handbook
<version>: increasing number with decimals between public releases
<company/person>: consortium partner short name e.g. Martel or sender initials e.g. LK for Lamprini Kolovou
e.g. "NGI4ALL_D1.1_PM Plan_V03_20.11.2019.docx"
    
```

When a partner makes comments or changes to a file, he/she should append his/her “_<company/person>” field just before the .extension.

These filename conventions apply to other electronic objects, besides documents, that are used to exchange project information, e.g. prototype code. If such an object is composed of multiple files organized within a directory structure (e.g. source code that has not been zipped into one file), the filename convention requirement applies only to the top directory name.

6.5.4 Deliverable Preparation Guidelines

A total of 27 deliverables will need to be submitted to the European Commission in the course of NGI4ALL project. To ensure smooth and timely delivery of deliverable as well as homogeneous presentation, a set of guidelines for the preparation of deliverables is presented here.

6.5.4.1 Deliverable Types and Confidentiality Levels

The deliverables are classified according to the following types:

P: Prototype

R: Report

D: Demonstrator

O: Other

Insofar the confidentiality of deliverables and other documents, including presentations, is concerned, the following four (4) levels of security are considered:

PU: Public Usage. No restrictions on access (in secured PDF format).

PP: Restricted to other programme participants (including the Commission Services).

RE: Restricted to a group specified by the consortium (including the Commission Services).

CO: Confidential, only for members of the consortium (including the Commission Services).

6.5.4.2 Deliverable Preparation and Peer Review Process

All deliverables should be formed according to the Deliverable template maintained within the documents repositories. The template provides a deliverable identity sheet and specifies formatting for the most used elements of deliverable report. The partners responsible for the deliverable are required to ensure that before releasing the first deliverable draft to partners, it is in the correct template, specified format and the identity sheet is complete. The table below shows the process to be observed for preparing deliverables.

Who	Action	To Whom	Deadline
DL	<ul style="list-style-type: none"> Prepares Table of Content (ToC) and Circulates for agreement by partnership Proposes Assignments on the ToC and agrees with the contributors Presents timetable for intermediate versions 	Contributing Partners, Review Team	> 6-7 weeks PTD
DL	<ul style="list-style-type: none"> Updates ToC according to gathered comments 	Contributing Partners	> 1 month PTD
Contributing Partners	<ul style="list-style-type: none"> Work on the document Issue intermediate releases 	Contributing Partners	Ad Hoc
DL	<ul style="list-style-type: none"> Consolidates all input Issues initial complete draft Circulates for comments 	Contributing Partners and WPL	2-3 weeks PTD
Contributing Partners and WPL	<ul style="list-style-type: none"> Review the document Provide comments 	DL	2 weeks PTD
DL	<ul style="list-style-type: none"> Document update addressing comments received Consolidates all input Issue updated complete draft 	Consortium Review	1 week PTD



Who	Action	To Whom	Deadline
	<ul style="list-style-type: none"> Returns document for internal Peer Review 		
Review Team	<ul style="list-style-type: none"> Review the document Provide comments 	DL	1 week PTD
DL	<ul style="list-style-type: none"> Final editing: Update document addressing comments received 	WPL, DL, RQM, SM, TMT	5 days PTD
QM	<ul style="list-style-type: none"> Final approval (if not approved it returns immediately back to the DL for revision) 	CO	2 days PTD
CO	<ul style="list-style-type: none"> Submits Deliverable to the European Commission Places the submitted PDF version on the DMS under the respective WP folder 	European Commission	1 day PTD

TABLE 12: DELIVERABLE PREPARATION PROCESS

6.5.4.3 Deliverable Reviewers

Due to the composition and size of the Consortium all the Partners except the DL are responsible to participate to the Review process.

6.5.5 Communication Tools Guidelines

To support the project management of the project and facilitate the collaboration of the partners a number of tools have been provided. This section provides guidelines for the use of these tools:

- ➔ **Virtual or Face-to-face meeting:** Guidelines for meetings can be found in Section 6.5.1, where a list of the main consortium contacts may be found at Redmine.
- ➔ **E-mail:** To facilitate e-mail mass communication for the project a mailing list (all@ngi4all.eu) including all consortium members active to the project is compiled. Every email relevant to NGI4ALL, either sent to a NGI4ALL mailing list or to a number of members, should have a **subject starting with “[NGI4ALL]”**, to easily distinguish NGI4ALL emails from others.
- ➔ **Document Management System (DMS):** Due to the need for frequent exchange of documents which often exceed the file size limit of e-mail systems and the structuring of project information, a secure document management system to store and facilitate the exchange of documents is available at **Gdrive** and **Cloud**.
- ➔ **Online collaboration tools:** Partners are encouraged to utilize online collaboration tools (such as **Skype**, **GoToMeeting (CITRIX)**, **Cloud**, **Google Docs**, **Google Drive** etc.) to facilitate their day to day work. NGI4ALL project management places no restriction on the use of tools, however, strongly advises the partners to examine the terms and conditions of these tools in relation to licenses, copyright restrictions and confidentiality as inadvertently may be disseminating confidential information to the public.
- ➔ **NGI4ALL public website** (<https://www.ngi.eu/>) is the public website of the project.



7 EFFORT AND COST MANAGEMENT PLAN

7.1 INTRODUCTION

The **CO** with the support of the **PMO** is responsible for managing and reporting on the project's budget and effort consumption at the project level to the European Commission throughout the duration of the project. During the internal semi-annual, interim and annual progress reports, the CO collects, presents and reviews the project's effort and cost performance for the preceding period. Performance is measured comparing actual consumption against planned. The CO is responsible for accounting for cost and effort deviations and presenting the consortium with options for getting the project back on budget.

7.2 EFFORT AND COST MANAGEMENT APPROACH

Effort and costs for this project will be managed at the Task level of the Work Package Structure (WPS). The financial performance of the project will be measured and managed through comparisons between the actual comparison and the effort calendar and cost baselines. Activity effort is detailed at the task level and costs at the WP level. To avoid confusion and complications due to conflicts between National and European Union reporting rules, all efforts are to be reported in full hours. Euro amounts are to be reported in two decimals.

Effort and cost variances of **+/- 10% in the cost and effort performance** indexes will change the status of the cost to cautionary. Cost variances of **+/- 20% in the cost and effort performance** indexes will change the status of the cost to an alert stage. These will serve as input to Risk Assessment and may require corrective action by the CO in order to bring the cost and/or effort performance variations below the alert level. Corrective actions will require a project change request and be must approved by the PMB before it can become within the scope of the project.

7.3 PLANNING AND REPORTING EFFORT AND COSTS CONSUMPTION

7.3.1 Planning Effort and Costs Consumption

Planning effort and cost consumption occurs through the completion of the project schedule MS-Excel file referenced in Section 8 for the entire project at the beginning of the project. Additionally, apart from the personnel costs that are reported as envisaged costs that may be consumed under each Task in person hours, all partners should provide a list of planned other direct costs (i.e. travel and other specific costs) for the whole project duration per reporting period. Finally, all partners should report on their average personnel rate, if the one used in the Annex 1 of the DoA is no longer valid. This information is consumed by the PMB to produce the Cost Baseline and Effort Schedule.

7.3.2 Reporting Effort and Budget Consumption

The following reports are established:

- ➔ Periodic Progress Reports (for external reporting to EC)
- ➔ Semi-annual Progress Reports (internal reporting to CO)
- ➔ Short progress reports (internal reporting before each GA meeting)

The PMB on a semi-annual basis updates internally the project progress status via the semi-annual progress reports, i.e. effort / resource consumption xlsx files received by all partners,



and the activity bulleted reports provided by the WPLs. More specifically the overall reporting per project period is as follows:

#	Steps per period	Who	To Whom	When	Instrument
1	Each partner provides period effort & cost consumptions, with the effort consumptions, accompanied by work progress description, at Task level.	Partners	PMB	20 days after the end of each year's half	resource consumption xlsx file, work description, word file, email
2	WPLs will perform a consistency check between effort and activities taken place by partners in each task and if needed adaptation/rationalization of effort/activities reported may take place; otherwise this information is transferred to the PMB.	WPL	PMO, CO or PMB	4 days after receipt of reports	e-mail
3	For every reporting period, WPLs should manage the collection of task reports from Task leaders. TLs (also in collaboration with the partners involved in each task) should provide a consolidated report and send this to the respective WPL. The reporting should follow the guidelines set by the European Commission for H2020 Programme ⁷ and the format of the NGI4ALL Deliverable .docx template. These reports should also reference any deviations occurred to the project time plan at Task level along with their contingency planning.	Partner TL	TL WPL	TC by each WPL and not later than the end of each reporting period	
4	PMB consolidates all information received and delivers a complete report to European Commission following the guidelines set by the European Commission within H2020 Programme ⁸ and the format of the NGI4ALL Deliverable .docx template	PMB	European Commission	60 days after the end of the reporting period (M18 and M36)	Interim/annual deliverable, email
5	Upload of Form C (and Certificate of Financial Statement; where needed) to the European Commission Participant Portal (ECAS system)	Partners	European Commission	20 days after the end of the reporting period (M18 and M36)	European Commission Participant Portal
6	WPL provides a short WP progress report before each GA physical or teleconference meeting	WPL	PMO	2 calendar days before the meeting	Word template, email

TABLE 13: EFFORT AND BUDGET CONSUMPTION REPORTING PROCEDURE

⁷ http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/amga/h2020-amga_en.pdf

⁸ http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/amga/h2020-amga_en.pdf

NOTES:

- * Project quarters end on M3, M6, M9, M12, M15, M18, M21, M24, M27, M30, M33, M36.
- * The preparation of each internal Periodic Progress Report requires steps 1 - 3
- * The preparation of each Interim Progress Report requires steps 1 (for 6-month duration) and 4 - 6.
- * The preparation of each Periodic Progress requires steps 1 (for 18-month duration) and 4 - 6.

7.3.3 Guidelines for Unplanned Expenses

The **Annex 1 to the Grant Agreement** details a **budget** for each partner and for each task or activity in NGI4ALL. Any effort or cost allocation which deviates from this plan presents an unplanned expense. In general terms, unplanned expenses are not allowed. However, due to the realities of implementing a project, there is the possibility that reasonable and justifiable expenses contributing to the project and not contradicting the rules of the project may be eligible.

If a partner has a cost which they believe falls under this category, they must obtain permission from the Project Officer before incurring the cost. To do so, they need to discuss the issue with their WPL as first step. If they concur, they should e-mail the PMB with a justification to the cost requesting from the PMB to obtain approval from the Project Officer. Follow due diligence, the PMB may reject the justification and inform the partner or accept it and forward the justification to the Project Officer. Once the PMB receives a response from the Project Officer they inform the partner.

For **travel outside the European Union** for dissemination the procedure is particularized as follows: Partners must send a request via e-mail to the dissemination leader well in advance of the trip. The e-mail must contain the following information:

- ➔ Who is travelling
- ➔ Destination of the trip
- ➔ Date of the trip
- ➔ The trip's relevance to the NGI4ALL project.

The dissemination leader will examine the request and upon approval will forward it to, with the recommended action, to the PMB. In the event the request is accepted the PMB will forward the request to the Project Officer who has the final say on the matter. The partner will be informed of the decision.

7.4 MEASURING PROJECT EFFORT AND COSTS

Following each internal semi-annual management report, the PMB will use a comparison between actual against planned to measure variance.

If the effort and cost have a variance of between 10% and 20% of planned, the reporting Partner must report the reason for the exception. If the variance is greater than 20% the reporting Partner must report the reason for the exception and provide the PMB with a detailed corrective plan to bring the project's performance back to acceptable levels.

7.5 EFFORT AND COST VARIANCE RESPONSE PROCESS

Once the variation exceeds the 20% threshold the reporting PM must present the PMB with options for corrective actions. The PMB will meet to select the best option. The PMB will



develop corrective action plan to bring the project back on track. Once the PMB approves the plan, the change control procedure will be activated and the action plan will become part of the project plan.

7.6 COST CHANGE CONTROL PROCESS

The cost change control process will follow the established project change request process. Approvals for extreme project effort/cost changes may require a contract amendment.



8 PROCUREMENT

During the project, partners will may be required to acquire from third parties the following services:

- ➔ Auditing Services for partners exceeding the threshold funding value
- ➔ Software or hardware equipment (e.g. laptops, license software for additional services etc.). From the original proposal and NGI4ALL DoA, we do not foresee such costs. However, the consortium should investigate this possibility, in case hosting services will be necessary.
- ➔ Organization for online or offline meetings for training, dissemination and project meetings.
- ➔ Production of dissemination material.
- ➔ Transportation and accommodation for travel.

The number of each item and budget allocation for each category is detailed in the **Annex 1 of the DoA**.

The CO and PMO have oversight of the procurement for the project through the Financial Reports. The actual management for procurement activities falls with the budget holding partner and as these activities are described analytically in the DoA (experts' procurement procedure, reputation management subcontractor). The partner assigned with subcontracting budget is responsible for following the procedure agreed in the DoA and /or mentioned in the EC guidelines. The partners are required to strictly adhere to the Annex 1 of the DoA and Grant Agreement guidelines for purchases. For deviations in purchases, partners must obtain approval before proceeding with procurement according to Section 6.3.3.



9 PROJECT SCOPE MANAGEMENT PLAN

9.1 INTRODUCTION

The **Scope Management Plan** provides the scope framework for this project. This section documents the scope management approach, verification and control measures. Roles and responsibilities as they pertain to project scope, scope definition, scope change control, and the project's work breakdown structure have been discussed in earlier chapters. Any project communication which pertains to the project's scope should adhere to the **Communication Management Plan** (Section 6).

9.2 SCOPE VERIFICATION

The project deliverables will need to be verified against the original scope as defined in the **Annex 1 of the Grant Agreement (DoA)** in the **WT3: 'Work package description'**. The verification against the scope occurs through the peer review and approval process described in SECTION 6.5.4 of this document. The European Commission review of the deliverables during the period review meeting is the final check point of the acceptance of the deliverables.

9.3 SCOPE CONTROL

The Partners will work together to control of the scope of the project. The project team will leverage the Annex 1 of the DoA using it as a statement of work for each deliverable. The project team will ensure that they perform the work described in the Technical Annex of the DoA and generate the defined deliverables keeping as ultimate guide the project vision. When the WPS does not seem to serve the project vision, partners will introduce change requests through the project structure. The CO along with the Management Team and the PMB will oversee the project team and the progression of the project to ensure that this scope control process is followed.

If a change to the project scope is needed the change control process for recommending changes to the project must be carried out. Any partner can request changes to the project scope. All change requests must be submitted to the CO, WPL, or TL in the form of a change request e-mail and the process in Section 5 will be followed.



10 SCHEDULE MANAGEMENT PLAN

10.1 INTRODUCTION

The **project schedule** is the roadmap for how the project will be executed. Schedules are an important part of any project as they provide the consortium with a clear picture of the project’s status at any given time. The purpose of the **schedule management plan** is to define the approach to project schedule management including monitoring and controlling changes to the baseline. This includes identifying, analysing, documenting, prioritizing, approving or rejecting, and publishing all schedule-related changes.

10.2 SCHEDULE MANAGEMENT APPROACH

Project schedules will be in the form of **Gantt Charts**. Schedule planning occurred during proposal stage of the project and can be found in the DoA.

A working version of the current schedule may be found in the following figure. The first column presents the work package and task structure of the project. In the first and second row the calendar year and the calendar months of the projects are shown respectively. Within the area of the three-year duration, the coloured cells indicate the months where each task is active and the Deliverables that are planned for each Task and project month.

WP #	Tasks #	Year 1						Year 2						Year 3						
		1	2	3	4	5	6	7 - 11	12	13 - 17	18	19 - 23	24	25 - 33	34	35	36			
WP1	NGI PILOT	MS 1	MS 2				MS 5				MS 7				MS 8					
	T1.1																			
	T1.2				D 1.1.1							D 1.1.2					D 1.1.3			
	T1.3						D 1.2.1				D 1.2.2				D 1.2.3					
WP2	NGI CHARISMA	MS 1	MS 2			MS 4			MS 5			MS 7								
	T2.1	D 2.1																		
	T2.2							D 2.3.1			D 2.3.2			D 2.3.3						
	T2.3	D 2.2																		
	T2.4																			
WP3	NGI INSIGHT	MS 1	MS 3				MS 5				MS 7									
	T3.1	D 3.1																		
	T3.2							D 3.2.1			D 3.2.2			D 3.2.3						
	T3.3							D 3.3.1			D 3.3.2			D 3.3.3						
WP4	NGI SHAKE	MS 1					MS 5				MS 7									
	T4.1					D 4.3.1			D 4.3.2			D 4.3.3								
	T4.2							D 4.1												
	T4.3	D 4.2																		
	T4.4																			
WP5	NGI FIGHTER	MS 1	MS 6											MS 9						
	T5.1																			
	T5.2	D 5.1		D 5.2.1				D 5.2.2				D 5.2.3								

FIGURE 8: NGI4ALL GANTT CHART – PROJECT SCHEDULE

This table will be enhanced with extra columns and rows to depict the estimated effort allocation for each partner at task level. The sums of efforts for each WP, per month and as a WP total, will be automatically calculated and displayed in the table. In the event of delays or rescheduling the white cells also will contain effort allocations i.e. to indicate task extensions. When, the project is on schedule only coloured cells will contain effort allocations. A total row will be added, automatically calculating the effort for each month at the project level as well. In addition, it is important to mention that every project schedule should be accompanied by an action items list indicating the main activities conducted at WP level. This action items list



should be composed by the WPLs in collaboration with the TLs and provided to the CO and PMO for review.

In the Annex 1 of the DoA, the project activities were identified organized in work packages which were broken into tasks. The outcomes of one or more tasks are reported in one deliverable. Task sequencing was used to determine the order of tasks. Task duration estimates were performed to months required to complete tasks within the constraints of the program. Duration and resource estimates are used to assign resources to tasks in order to complete schedule development.

The project schedule will be reviewed by the PMO, CO and WPLs on a continuous six-month basis until the project end. In case of deviations, project partners must agree to the proposed resources, effort assignments, durations, schedule, and once this is achieved the PMB will review and approve the schedule which will become the new baseline.

The CO with the support of the PMO and PMB will be responsible for facilitating the schedule development and adjustments. The PMO will also create the project schedule using MS-Excel and validate the schedule with the partners. The CO may obtain schedule approval by the Project Officer before re-baselining the schedule especially when that entails major calibrations of the agreed schedule.

The partners are responsible for participating in activity definition, sequencing, and duration and resource estimating. Partners will also review and validate the proposed schedule and perform assigned activities once the schedule is approved.

The European Commission will participate in reviews of the proposed schedule through the annual project review and contract amendments as necessary.

10.3 SCHEDULE CONTROL

The **project schedule** will be reviewed as necessary on a **monthly basis** by the respective WPLs following recommendations and input received by the CO and TLs. Better control of the project schedule would be anyway performed during the bi-weekly WP online calls, as they are foreseen to take place during the project course. If a variance of **1 month or more** is observed against the Schedule baseline at WP level, the respective WPL will inform the PMB and PMO who in turn will review the project schedule. Otherwise, project schedule reviews will be held regularly by the PMB and partners **on a quarterly basis** through the preparation of the internal quarterly work package progress status report.

The **PMB members** are responsible for discussing schedule variances during the **PMB meetings**, determining impacts; submitting schedule change requests; and reporting schedule status in accordance with the project's communications plan.

The partners are responsible for participating in schedule variance resolution activities as needed.

The CO will communicate to the European Commission of the project schedule status and review/approve any schedule change requests as necessary.

10.4 SCHEDULE CHANGES AND THRESHOLDS

If any partner determines that a change to the schedule is necessary, the **change control procedure** will be initiated. The CO, PMB, WPL, and PMO must analyse the request and determine:

- ➔ Which tasks will be impacted and in what way,



- ➔ Variance as a result of the potential change,
- ➔ Alternatives or variance resolution activities they may employ to see how they would affect the scope, schedule, risks, quality and resources.

If analysis shows that the proposed change may affect the duration of any individual task or the overall project by 2 months, a change request is required. Any other change requests that do not meet this threshold may be submitted for consideration.

Once the change request has been reviewed and approved, the CO and PMO are responsible for adjusting the schedule and communicating all changes and impacts to the consortium and the European Commission. The PMO must also ensure that all change requests are documented in the change log.



11 RISK MANAGEMENT PLAN

11.1 INTRODUCTION

Risk is an “event/issue” that may happen and have an impact on our project. The purpose of the **Risk Management Plan** is to prevent those events from happening or minimize their impact in case they happen.

NGI4ALL is a complicated and demanding project and its success highly depends on the effectiveness of the **risk management process**. The objective of the risk management procedure is to provide the processes and techniques for the evaluation & control of potential project risks, focusing on their precautionary diagnosis & handling. The **Coordinator** with the cooperation of the **PMB** and the rest of the project management roles (WP and Task Leaders) will be mainly responsible to handle risks and inform all partners when necessary.

11.2 RISK METHODOLOGY

Risk management is as an overarching process that encompasses **risk planning** (identification, assessment, analysis, mitigation planning) and **risk abatement** (mitigation plan implementation, tracking, risk reassessment), in an **iterative cycle** until the end of the project, to ensure that risks are identified in a timely manner and handled proactively.

In more detail, this involves the **identification** of a risk, the **assessment** of its importance and the **evaluation** of whether the risk level is higher than the risk that could be accepted for the project. In case that a risk exceeds the acceptable levels, a risk **analysis** activity will be instantiated that will define the required actions, in order to set the risk within acceptable levels. In addition, the management of risks also involves the planning of the required activities to handle the risk, the redistribution of resources, the evaluation of the results, as well as ensuring the stability of the new status.



FIGURE 9: RISK MANAGEMENT PROCESS

Timely awareness and reaction to potential problems are crucial to effective risk management. That is why it is essential for NGI4ALL to effectively manage changes. Changes may arise in **project scope, project cost, time-schedule or techniques employed**. In NGI4ALL, change management will be realized with standard activities (as described in Chapter 5) ensuring that potential changes will happen only if necessary, and that they will be reported appropriately. This involves the **evaluation** of the **necessity** of a change and the assessment of its **consequences**. The primary objective is to avoid reasonless project breaks, budget excess and uncontrolled time-schedule extensions, and for that purpose a number of internal and external risks were identified even from the beginning of the project and will be constantly be updated; these are described in the following subsections.

Internal risks will be minimized and managed by using well-established methodologies for project planning and project control. The splitting of project work into individual packages also

minimizes internal risks. The CO in cooperation with the project management roles will be mainly responsible to handle internal risks and inform all partners when necessary. The management of external risks lays primarily on the hands of the PMB. External risks will be minimized by following closely on technological and business development in the field as well as on pertinent regulatory issues.

11.3 RISK IDENTIFICATION

Risk Identification is the first key activity that examines each element of the program to identify associated risks and set the stage for their successful management. The risks that will be documented in the context of NGI4ALL will be classified according to their probability and severity following the below **three axes**:

- ➔ **administrative and organization risks:** including lack or shortage of availability of key resources, withdrawal of the participation of a partner having a key role, lack of communication;
- ➔ **technical implementation risks:** including methodologies and tools replacement issues, inadequate tools integration and collaboration, inadequate project results; and
- ➔ **communication and business risks:** like low interest of the targeted community / stakeholders, insufficient impact in standards liquidation of a partner business during the course of the project.

A baseline set of risks shall be identified and entered as risk statement through a Risk Information Form. Each risk is identified by number (for configuration control) and have a responsible partner/person (s) assigned as risk owner. The risk owner has the overall responsibility for risk management activities until final closure of the risk.

11.4 RISK ASSESSMENT AND ANALYSIS

Once the Risks have been identified they should be analysed and assessed as to the likelihood (what’s the “chance” it will go wrong) and consequence of occurrence (what’s the “effect” on the project if it does go wrong).

The level of likelihood of each risk is established utilizing the following specific criteria.

Level	Likelihood	Probability of Occurrence
1	Not Likely	~10%
2	Low likelihood	~30%
3	Likely	~50%
4	Highly Likely	~70%
5	Near Certainty	~90%

TABLE 14: LEVEL OF RISK LIKELIHOOD

The level of consequence of each risk is established utilizing a number of criteria related to a concrete situation or a recognized hazard. Finally, the overall impact is assessed and the level of consequence is calculated as follows:



Level	Impact of occurrence
1	Negligible
2	Minor
3	Moderate
4	Significant
5	Severe

TABLE 15: LEVEL OF RISK CONSEQUENCE

Each partner should contribute to the risk assessment process by the definition and the identification of the different kind of risks and hazards that might be generated by a specific module of the NGI4ALL platform. The collection and classification of the risks needs specific description and formulation in a unique matrix for each subsystem/module, in order to make feasible their systematic analysis. The following matrix calculates quantitatively the risk “score” as illustrated in the matrix below. The matrix is not symmetric as consequence values are weighted more than likelihood values.

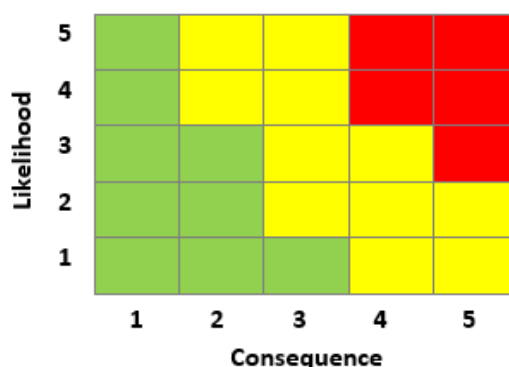


FIGURE 10: ASSESSMENT OF THE IDENTIFIED RISK ACCORDING TO ITS LIKELIHOOD AND CONSEQUENCE LEVELS

The following table converts the score to a qualitative risk assessment.

Risk Level	Definition
LOW	Has little potential to cause disruption of schedule, increase in cost, or disruption of performance. Normal company effort will probably be able to overcome difficulties
MODERATE	Can potentially cause some disruption of schedule, increase in cost, or disruption of performance. However, special effort will probably be able to overcome difficulties.
HIGH	Likely to cause significant serious disruption of schedule, increase in cost, or degradation of performance even with special effort and close monitoring of the contracting activity.

TABLE 16: RISK SCORE ASSESSMENT

11.5 RISK MITIGATION

Risk mitigation planning identifies, evaluates, and selects options to lower risk at acceptable levels given program constraints and objectives.

This can be accomplished through reduction in likelihood, reduction in consequences, or a combination of both. It includes the specifics of **what** should be done, **when** it should be accomplished, **who** is responsible, and the **resources** required to implement the risk mitigation plan.

11.6 RISK MITIGATION PLAN IMPLEMENTATION

The next key activity is the Risk Mitigation Plan Implementation which ensures successful risk mitigations occurs. It:

- ➔ Directs the teams to execute the defined and approved risk mitigations plans,
- ➔ Outlines the risk reporting requirements for on-going monitoring and
- ➔ Documents the change history.

Implementing risk mitigation should be accomplished by risk category (technical performance, schedule, cost) and it's important for this process to be worked through the WBS level to scrub and endorse the risk mitigations of lower levels. It is important to mitigate risk where possible before passing it up to the next WBS level.

11.7 RISK TRACKING

The final key activity is risk tracking which is the activity of systematically tracking and evaluating the performance of risk mitigation actions. The PMB monitors progress and regularly updates risk status and information. Risk tracking is actually a feedback procedure where risk abatement plans may be revised or updated based on risk status update. If the plan is not effective, alternative plans must be put in place to ensure that risk is appropriately handled.

A project **Risk Register** is to be kept and reviewed at the PSTC physical meetings. For each identified risk the Risk Register shall detail at least:

- ➔ Risk title;
- ➔ Risk description;
- ➔ Description of the risk impact;
- ➔ Log date;
- ➔ Likelihood;
- ➔ Its potential consequence on the project;
- ➔ Work package in which the risk is managed;
- ➔ Risk owner;
- ➔ Risk status (Open / Occurred / Not occurred / Cancelled);
- ➔ A list of envisaged solutions / mitigation plan
 - action number
 - action description



- target date for action
- current action status
- ➔ The deadline for decision;
- ➔ Progress / comments.

Available here:

https://docs.google.com/spreadsheets/d/1jG32tW6XT3NJrNC42_vLYIWToghTLqfFZExDpTbDfHo/edit?usp=sharing

11.8 RISK BASELINE

The NGI4ALL consortium partners have realized that they take the responsibility of an ambitious, innovative project with major strategic impact. As a result, a preliminary list of identified risks along with their contingency planning is presented in Section **1.3.5 WT5: Risk assessment and mitigation plans of Part A of the GA**.



APPENDIX A – PROJECT DOCUMENTS TEMPLATES

DELIVERABLES TEMPLATE



PRESENTATIONS TEMPLATE

1

NGI4ALL | Content

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3

4

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PHYSICAL MEETING'S AGENDA TEMPLATE

NGI4ALL kick-off meeting
23-24.01.2019, Zurich, Switzerland

Location: Zurich, Switzerland

Venue: Technopark Zurich, Room "Pauli 3012"

Start: Date: 23.01.2019 Time: 13:00

End: Date: 24.01.2019 Time: 16:00

Document: Status draft Version v02

Contact(s): [Lamprini Kolovou, 0041 79 938 26 14, lamprini.kolovou@unimed.it, kolovou@unimed.it](mailto:lamprini.kolovou@unimed.it)
[Sandra Willner, 0041 79 487 97 80, 0041 31 994 25 25, sandra.willner@unimed.it, willner@unimed.it](mailto:sandra.willner@unimed.it)

Agenda

DAY 1 - 23.01.2019			
Start	End	Session	Lead
13:00	13:10		
13:10	13:40		
13:40	14:10		
14:10	14:30		
14:30	14:45		
14:45	16:00		
16:00	17:00		

Social dinner: 19.30

NGI4ALL

DAY 2 - 24.01.2019			
Start	End	Session	Lead
9:30	10:40	•	
10:40	10:55		
10:55	12:05	•	
12:05	13:05		
13:05	14:15	•	
14:15	14:30		
14:30	15:40	•	
15:40	16:00	•	

Wifi Connection:
SSID: House.Wifi
Password: fo49by02

NGI4ALL

Practical information

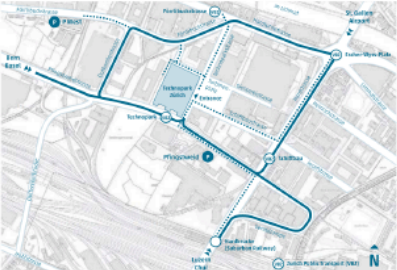
Travel information:
 Technopark Zurich (<https://www.technopark.ch/en/>)
Address: Foundation TECHNOPARK® Zürich
 Technoparkstrasse 1, 8005 Zurich, Switzerland
Room: Pauli 3012, 3rd floor ([Map of rooms](#))

How to get there:
By public transport

- Tram no. 4 to Technopark, walk 2 minutes
- Tram no. 17 to Forthbüchelstrasse, walk 4 minutes
- Tram no. 4, 13 or 17 to Escher-Wyss-Platz, walk 8 minutes
- Bus no. 33 to Schiffbau, walk 4 minutes
- Bus no. 72 to Schiffbau, walk 4 minutes
- S-Bahn lines S3 / S5 / S6 / S7 / S9/ S12 / S15 / S16 to Hardbrücke, walk 8 minutes

More information about how to get to the venue:
<https://www.technopark.ch/en/contact/>
[SBB/S-Bahn timetable](#)

A map is available here:



https://www.technopark.ch/wp-content/uploads/2014/07/tp_how_to_find_us.pdf
<https://goo.gl/maps/aM2M2i5iB2>

NGI4ALL

List of participants

#	Participants	Organization	23.01.2019	24.01.2019



PHYSICAL MEETING'S MINUTES TEMPLATE

<p>GA number: 825354 "Next Generation Internet for All – Promoting Global Visibility on the Human-Centric Internet"</p> <p>NGI4ALL project meeting xx.xx.20xx, Xxxxx, Xxxxxx</p> <p>Location: Venue: Start: Date: Time: End: Date: Time: Document: Status draft Version v0.x Contact(s):</p> <p>Minutes</p> <p>DAY 1 – xx.xx.20xx</p> <table border="1"> <thead> <tr> <th>Session</th> <th>Title of the session</th> <th>Lead</th> <th>Partner</th> </tr> </thead> <tbody> <tr> <td>Discussion</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Actions</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Material / Links</td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>Session</th> <th>Title of the session</th> <th>Lead</th> <th>Partner</th> </tr> </thead> <tbody> <tr> <td>Discussion</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Actions</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Material / Links</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Session	Title of the session	Lead	Partner	Discussion				Actions				Material / Links				Session	Title of the session	Lead	Partner	Discussion				Actions				Material / Links				<p>GA number: 825354 "Next Generation Internet for All – Promoting Global Visibility on the Human-Centric Internet"</p> <p>DAY 2 – xx.xx.20xx</p> <table border="1"> <thead> <tr> <th>Session</th> <th>Title of the session</th> <th>Lead</th> <th>Partner</th> </tr> </thead> <tbody> <tr> <td>Discussion</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Actions</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Material / Links</td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>Session</th> <th>Title of the session</th> <th>Lead</th> <th>Partner</th> </tr> </thead> <tbody> <tr> <td>Discussion</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Actions</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Material / Links</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Session	Title of the session	Lead	Partner	Discussion				Actions				Material / Links				Session	Title of the session	Lead	Partner	Discussion				Actions				Material / Links				<p>GA number: 825354 "Next Generation Internet for All – Promoting Global Visibility on the Human-Centric Internet"</p> <p>List of participants</p> <table border="1"> <thead> <tr> <th>#</th> <th>Participants</th> <th>Organization</th> <th>23.01.2019</th> <th>24.01.2019</th> </tr> </thead> <tbody> <tr><td>1</td><td></td><td></td><td></td><td></td></tr> <tr><td>2</td><td></td><td></td><td></td><td></td></tr> <tr><td>3</td><td></td><td></td><td></td><td></td></tr> <tr><td>4</td><td></td><td></td><td></td><td></td></tr> <tr><td>5</td><td></td><td></td><td></td><td></td></tr> <tr><td>6</td><td></td><td></td><td></td><td></td></tr> <tr><td>7</td><td></td><td></td><td></td><td></td></tr> </tbody> </table>	#	Participants	Organization	23.01.2019	24.01.2019	1					2					3					4					5					6					7				
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ONLINE AGENDAS AND MINUTES

GA number: 825354
"Next Generation Internet for All – Promoting Global Visibility on the Human-Centric Internet"

NGI4ALL Online meeting - "Xxxxxx xxxxxxx"

XXXXXX, xx.xx.20xx, xx:00 CET

Connecting with GotoMeeting

<p>Access Code: 658-644-621</p> <p>https://global.gotomeeting.com/join/658644621</p>	<p>You can also dial in using your phone.</p> <table border="1"> <tr> <td>Belgium: +32 28 93 7002</td> <td>Netherlands: +31 207 941 375</td> </tr> <tr> <td>Denmark: +45 32 72 03 69</td> <td>Norway: +47 21 93 37 37</td> </tr> <tr> <td>Finland: +358 923 17 0556</td> <td>Spain: +34 912 71 8488</td> </tr> <tr> <td>France: +33 170 950 590</td> <td>Sweden: +46 853 527 818</td> </tr> <tr> <td>Germany: +49 692 5736 7300</td> <td>Switzerland: +41 225 4599 60</td> </tr> <tr> <td>Ireland: +353 15 295 146</td> <td>United Kingdom: +44 330 221 0097</td> </tr> <tr> <td>Italy: +39 0 230 57 81 80</td> <td></td> </tr> </table>	Belgium: +32 28 93 7002	Netherlands: +31 207 941 375	Denmark: +45 32 72 03 69	Norway: +47 21 93 37 37	Finland: +358 923 17 0556	Spain: +34 912 71 8488	France: +33 170 950 590	Sweden: +46 853 527 818	Germany: +49 692 5736 7300	Switzerland: +41 225 4599 60	Ireland: +353 15 295 146	United Kingdom: +44 330 221 0097	Italy: +39 0 230 57 81 80	
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Germany: +49 692 5736 7300	Switzerland: +41 225 4599 60														
Ireland: +353 15 295 146	United Kingdom: +44 330 221 0097														
Italy: +39 0 230 57 81 80															

At the meeting:

Partner	Participant(s)	Partner	Participant(s)
Martel		Tipik	
Fbox			

Useful links:

- Draft agenda for kick-off meeting: <https://docs.google.com/document/d/1u2IXWZSS5sOodkqkZCanAduSHJVeEW-Q05nUDYdazwi/edit?usp=sharing>
- Templates (presentations, logo, deliverables): <https://drive.google.com/drive/folders/1pZ8qDduklievCczNREVUxc0xpu0Pzmq?usp=sharing>
- Important deadlines and milestones: <https://docs.google.com/presentation/d/1HW373CLP0PIn5yZRpFSSX1Yv6PpP-3jRxbSJUNY/edit?usp=sharing>
- Telcos minutes: <https://drive.google.com/drive/folders/1HaxWfTonbhhm5QU91gev4udawveq143?usp=sharing>

1

GA number: 825354
"Next Generation Internet for All – Promoting Global Visibility on the Human-Centric Internet"

Milestones status (M1-M12):

#	Milestone name	WPs	Beneficiary / Due	Means of verification	Status & explanation for the SYGMA portal
MS1	NGI4ALL project kicked off and NGI Outreach Office established	ALL	Martel M01	The first project meeting couple with NOO launch has taken place	Achieved, SYGMA updated
MS2	NGI rebranded and initial strategy defined	1, 2	Martel M04	The NGI Brand Toolkit and guidelines (D2.1), the release of the new NGI Communication & Marketing Strategy and Plan, (D1.1)	NGI rebranded and initial strategy defined
MS3	NGI Community Platform launched	3	Fbox M04	The NGI Community Platform is launched and the growth hacking plan strategy is defined (D3.1)	
MS4	NGI Online presence reloaded	2	Tipik M06	The rebranded version of the NGI Web Portal, NGI Online Map and social media profiles reloaded (D2.2)	
MS5	NGI communication's checkpoint – the goods and the bads after year 1	1, 2, 3, 4	Martel M12	Check and assessment of the lessons learned in year 1 for updates in strategic activities via D1.2.1, D2.3.1, D3.2.1, D3.3.1, D4.1.2, D4.5.1	

2



GA number: 825354
"Next Generation Internet for All –
Promoting Global Visibility on the Human-Centric Internet"

Deliverables status (M1-M12):

Del. No.	Deliverable name	WP	Leader	Type	Dis. level	Del.	Status
D5.1	Quality Assurance Plan	5	Martel	R	CO	M03	Ongoing - to be reviewed by all
D1.1.1	NGI Marketing and Communication Strategy and Plan	1	Martel	R	PU	M04	Ongoing - to be reviewed by all
D2.1	The NGI Brand Toolkit and Guidelines	2	Tipik	DEC, R	PU	M04	Ongoing
D3.1	The NGI community platform and growth hacking plan	3	Fbox	DEC, R	PU	M04	Ongoing
D2.2	NGI Online Presence Reloaded	2	Martel	DEC	PU	M06	
D5.2.1	Data Management Plan	5	Fbox	R	CO	M06	
D1.2.1	NGI Comms coaching report	1	Tipik	R	PU	M12	
D2.3.1	NGI CHARISMA Activities Report	2	Martel	PU	PU	M12	
D3.2.1	Growth hacking activities and NGI Ambassadors Programme report	3	Fbox	R	PU	M12	
D3.3.1	NGI community demographics and evolution	3	Martel	R	PU	M12	
D4.1	Media landscape	4	Tipik	R	PU	M12	Ongoing
D4.2	NGI Media database	4	Tipik	DEC	CO	M12	Ongoing

3

GA number: 825354
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Promoting Global Visibility on the Human-Centric Internet"

D4.3.1	Annual media and press coverage report	4	Tipik	R	PU	M12	
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Topics & discussion

1. NGI PILOT (Martel)

Actions from the last meeting

action	OWNER	Deadline	Status / comments
❖			
❖			

2. NGI CHARISMA (Tipik)

action	OWNER	Deadline	Status / comments
❖			
❖			
❖			

3. NGI INSIGHT (Fbox)

action	OWNER	Deadline	Status / comments
❖			
❖			
❖			

4

GA number: 825354
"Next Generation Internet for All –
Promoting Global Visibility on the Human-Centric Internet"

4. NGI SHAKE (Fbox)

action	OWNER	Deadline	Status / comments
❖			
❖			

Discussion:

- NGI Events - keep reminding the projects to add to this in the NGI Comms TF calls

5. NGI FIGHTER (Martel)

action	OWNER	Deadline	Status / comments
❖			

Discussion:

-

Actions:

-

5

