

DELIVERABLE

D1.2: Management and Quality Assurance Report - v.2

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PROJECT INFORMATION

Project summary

Circular economy aims at reducing value loss and avoiding waste, by circulating materials or product parts before they become waste. Today, lack of support for sharing data in a secure, quality assured, and automated way is one of the main obstacles that industry actors point to when creating new circular value networks. Together with using different terminologies and not having explicit definitions of the concepts that appear in data, this makes it very difficult to create new ecosystems of actors in Europe today. This project will address the core challenges of making decentralized data and information understandable and usable for humans as well as machines. The project will leverage open standards for semantic data interoperability in establishing a shared vocabulary (ontology network) for data documentation, as well as a decentralized digital platform that enables collaboration in a secure and privacy-preserving manner.

The project addresses a number of open research problems, including the development of ontologies that need to model a wide range of different materials and products, not only providing vertical interoperability but also horizontal interoperability, for cross-industry value networks. As well as transdisciplinary research on methods to find, analyse and assess new circular value chain configurations opened up by considering resource, information, value and energy flows as an integral part of the same complex system. Three industry use cases, from radically different industry domains, act as drivers for the research and development activities, as well as test beds and demonstrators for the cross-industry applicability of the results. The developed solutions will allow for automation of planning, management, and execution of circular value networks, at a European scale, and beyond. The project thereby supports acceleration of the digital and green transitions, automating the discovery and formation of new collaborations in the circular economy.

Project start date and duration

1st of June 2022, 36 months

Project consortium

No	Partner	Abbreviation	Country
1	Linköping University	LiU	Sweden
2	Interuniversitair Micro-Electronica Centrum	IMEC	Belgium
3	Concular Ug Haftungsbeschränkt	CON	Germany
4	+Impakt Luxembourg Sarl	POS	Luxembourg
5	Circularise Bv	CIRC	The Netherlands
6	Universitaet Hamburg	UHAM	Germany
7	Circular.Fashion Ug (Haftungsbeschränkt)	FAS	Germany
8	Lindner Group Kg	LIN	Germany
9	Ragn-Sells Recycling Ab	RS	Sweden
10	Texon Italia Srl	TEXON	Italy
11	Rare Earths Industry Association	REIA	Belgium



Document reference

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0.2	16 November 2023	Second draft	S. Stekovic	Sent to reviewer
0.3	26 November 2023	Third draft	S. Stekovic	
1.0	28 November 2023	Final version, minor updates after last check	E. Blomqvist	

Document approval

Version	Date	Name	Role in the project	Beneficiary
0.2	21 November 2023	Charis Lüdtke	Reviewer	UHAM
1.0	28 November 2023	Eva Blomqvist	PC	LIU

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1. Overall summary

This document, D1.2 Management and Quality Assurance Report - v.2, is a 2nd version of D1.1 that was submitted at M2. D1.1 outlined the planned management procedures and tools to be used for project management and reporting, as well as quality assurance and benchmarking of all delivered artefacts. D1.2 will in addition include a half-time evaluation of the management procedures and tools, as well as quality assurance procedures in use, and any adjustments for the second half of the project that have been brought up during the project meetings.

To summarise, the main updates are related to:

- Update of the meetings planned in the project (Table 1).
- Update of the deliverable review process.
- Update of the WP updates.
- Update of the dissemination and exploitation reporting.
- Update of the risk table (Appendix VI).

2. Introduction

This deliverable is a first update of the D1.1 deliverable submitted at M2 in the project. D1.2, the current document, gives an update and revision of the management procedures, tools and the quality assurance procedures used in the project. In addition to D1.1 and D1.2, the project is also managed and governed by the grant agreement and consortium agreement.

The objectives of this deliverable are to:

- To evaluate the management and quality assurance procedures outlined in D1.1,
- To update any information that has changed since D1.1 was published, and
- To adjust the management and quality assurance procedures according to the feedback from the project meetings.

D1.2 follows same structure as D1.1 but with updates and adjustments under each section. The appendices are also updated to reflect the status of the project at this stage, i.e. Appendix I shows the updated recommendation table from the EEAB and EA, Appendix II remains the same, Appendix III and V provide the updated list of deliverables with reviewers, Appendix IV also remains the same, and Appendix VI covers the updated risks table (two new risks are added).

2.1. Quality assurance

The project is structured around a set of deliverables, which are a central focus of quality assurance and control within the project. In addition, the following activities are also in place to ensure quality:

- i. to monitor the WP activities with the WP leaders (WPL),
- ii. to monitor and guide the implementation and assessment of milestones and deliverables,
- iii. to take necessary actions to adjust, modify and expedite the activity of work packages,
- iv. to decide whether deliverables pass internal review and can be submitted to the EC, and
- v. risk management.

As part of the quality assurance within the project, the safeguarding of ethics has been also included in WP1 to assist and facilitate the work and the decisions made by the Ethical Advisor.

Comments and suggestions by the External Advisory Board (EEAB) recorded in the meeting minutes have been tracked in a table for follow-up action as outlined in D1.1. At the end of the project, the PC will provide an evaluation report covering the most important findings and achievements of Onto-DESIDE throughout the project's lifetime.

The quality assurance activities have been the following:

- i. Bi-weekly meetings have been held between PC and PM to assess the project progress, review the remaining actions and decide on next steps.

- ii. Monthly meetings have been organised and held with the WP leaders. The minutes have been taken and shared via the internal file server with the consortium.
- iii. The PM and PC regularly monitor and assess deliverables and milestones. Both lists are regularly reviewed at the WPLs meetings and consortium meetings.
- iv. The process set up to review the deliverables before submission has been working well regarding the deliverable quality. However, few participants wish the process to start earlier to allow more time for agreeing on deliverable scope and outlines, as well as the review and approval. This is addressed in Table 2.
- v. The risk table has been regularly updated at the meetings. Two new risks have been added.

2.2. Risk management

An initial risk assessment has been performed during the proposal stage and at the start of the project in D1.1. This assessment has been re-evaluated throughout the project (every 6 months during the consortium and GA meetings, and every month during the WPL meetings) and whenever major deviations from the plan occur. The process has been working very well. The updated risk table is given in Appendix VI.

3. Project organisation and decision-making bodies

3.1 Organisation structure

The overall project management structure is the same and can be found in D1.1.

3.2 Decisions, operational management and procedures

The initial decision and operational management and procedures can be found in D1.1. They have not changed since their establishment. The WPLs meetings provide a forum to discuss any major scientific/technical and administrative issues and delays. Any major decisions and plans then go to the GA for further discussions and approval. All reports including deliverables, and milestones are discussed and approved internally by the review process before they are submitted to the EC. The decision making has been following a majority vote by e-mail and at face-to-face meetings. The agenda of the GA meeting was sent as planned, i.e. at least 14 days before the meeting. Draft minutes were also produced according to the plan, 10 calendar days after the meeting.

4. Management procedures

The general management structure of the project is same as presented in Figure 1 in D1.1. The management team also remains same as presented in Table 1 in D1.1.

The Management and Quality Assurance plan has been reviewed during the GA meetings. These reviews are focusing on the results from previous project reviews, results from internal audits, status of deliverables and milestones, any problems and risks occurred during the previous period and corrective actions to be taken during the next period, which has been documented in minutes.

One issue that has been raised is related to the deliverable setup and review process and

timeline which does not give enough time to set the scope, agree on outlines, and then draft and review the deliverables. It was suggested to set up earlier reminders when the deliverables are due, to kick-off the discussion on scope and outline earlier than what was suggested in D1.1.

4.1 Internal communication

The internal communication has been working well since the project start. The consortium uses the NextCloud server for document storage and exchange, which has been working but with some problems with formatting documents and access by few partners. These issues are unfortunately inherent to the platform and are not possible to change. Hence, agreement has been made that in some cases also files can be shared through other secure platforms hosted by the project partners, during a writing process, as long as the final results are uploaded on the NextCloud platform to be shared with all partners.

All project meetings are either held in hybrid form or online, i.e. even at face-to-face meetings there is always a hybrid option. The contact list is regularly updated by the PM and shared via the server. Agendas are sent in advance as planned, likewise with the meeting minutes. The PM and PC have been responsible for all minutes while the participating partners have been reviewing them. The website is also regularly updated and used to communicate the project activities as well as share open access documents and data within and outside the consortium.

4.2 External communication

The external communication has been related to support overall coordination and reporting to the EC representatives, including the submission of all project documentation and deliverables. Reporting of risks and requests for amendments are also included in this task. The PC and PM are the official point-of-contact with the EC and therefore all formal exchanges of information and reporting with the EC has been handled through them.

The first periodic report is due at M20 (two months after the 1st project period finishes at M18). The PC and PM will be responsible for submitting the periodic report to the EC. The PM will circulate templates to all partners to collect the required information for both technical and financial report. A one-day meeting is planned for preparing this activity in December 2023. The partners will have 45 days to complete the templates and send them back to the PC and PM. Then, the PC and PM will consolidate all reports to review and check them, before returning them to the partners for the final approval before submission to the EC.

In addition, a first review meeting with an external expert is being organised on 18th of December 2023 by the PC, PM and Project Officer.

The project has not had any amendments since the start. There is one request for a change of the budget between two cost categories at Texon, which does not require an amendment but approval by the PO.

4.3 Meetings

The schedule of all project meetings has been updated and is presented in Table 1. Bi-weekly meetings between the PC and PM have been added. Overall, meetings are organised at different layers consisting of bi-weekly meetings between the PC and PM, monthly WPLs meetings, consortium meetings, EEAB meetings, GA meetings and intermediary meetings. Overall, the frequency of meetings have been increased since the start of the project, due to requests from the partners. For instance, additional online consortium meetings have been arranged, in order to keep the partners updated on the progress and share results.

Table 1: Overview of the meetings planned in the project (updated from D1.1)

	Ordinary meeting	Extraordinary meeting
General Assembly meetings	At least twice a year and once with the EEAB	At any time upon written request of 1/3 of the Members of the GA
External Expert Advisory Board meetings	At least two times a year, may coincide with GA meetings.	At any time upon written request of any Member of the GA.
Consortium meetings	At least twice a year, preferably every 3-4 months (may coincide with GA meetings)	At any time based on a GA decision
WPL meetings	Monthly and additional if needed	At any time upon request from any partner, task leader and WP leader.
Intermediary meetings	As needed	At any time upon request from any partner.
PC and PM meetings	Bi-weekly and when needed	Any time when requested by PC or PM.

The following list presents an overview of Onto-DESIDE project meetings (only management meetings and meetings involving more than one task, or WP, are included in the list). Meetings that have already taken place are written in green.

- 20th of June 2022, kick-off meeting (part I) with the GA and EEAB members, all other participants in the project, and the Ethical Advisor, online by using Zoom.
- 22nd of June 2022, kick-off meeting (part II) with the project officer, online by using Zoom.
- 12th of July 2022, WP6 task leader meeting (online).
- 2nd of August 2022, WP6 task leader follow-up meeting (online).
- July 2022, GA decision without a meeting (through e-mail) to appoint EEAB and EA.
- August-September 2022, WP6 deliverable (D6.1) coordination meetings (online).
- 5-6th of September 2022, face-to-face consortium meeting, including GA and EEAB meetings, and with EA participation, physical meeting in Sweden.
- September-October 2022, WP2 requirements analysis meetings, and deliverable coordination (D2.1) (online).
- February 2023, Second consortium meeting and GA meeting.
- May 2023, Third consortium meeting (Online)
- June and August 2023 – Evaluation planning meetings between WPs 3, 4 and 6.

- September 2023, Fourth consortium meeting and GA meeting, hybrid, Italy and by Teams. The Ethical Advisor also attending the meeting.
- 13 WPLs meetings have been held online (the first Monday of every month).
- 4th and 15th of December 2023, Review rehearsal and planning meetings.
- 18th of December 2023, Review meeting, online.
- December 2023 or January 2024, Project meeting on reporting and other issues, online.
- Continuous bi-weekly between the PC and PM,
- Monthly meetings between the WP leaders.
- Consortium meeting in February-March 2024, including the EEAB and GA meeting.

The tools and procedures proposed in D1.1 have been implemented in the project and followed up by both the PC and PM. Agenda and minutes from all meetings are available on NextCloud. Each meeting has actions points that have been reviewed at the next following meeting and/or WPL meetings.

4.4 Data and document management

Data management is addressed in the Data Management Plan (D7.4 (v1) and D7.5 (v2)) in WP7 as well as in the grant agreement and consortium agreements.

4.5 Deliverables and milestones

In total, the project must submit 47 deliverables during the project lifetime. To ensure a proper and timely submission of every deliverable, the project has defined procedures and approval processes for their development and submission, which were presented in Table 4 in D1.1. However, this table has been updated to reflect the feedback received during the September 2023 consortium meeting. It was suggested that the PM and PC inform both the deliverable owner and the reviewer about the upcoming deliverable and deadlines earlier than initially determined. The first reminder shall be sent out to the deliverable owner and reviewer as early as three months in advance to ensure sufficient time to coordinate between all partners involved in the deliverable, e.g. for setting the scope and planning the outline of the deliverable well in advance of actually writing the actual report. This reminder is to be repeated after one month – so two months before the deliverable deadline – and then as scheduled previously in D1.1.

4.5.1 Quality assurance

All deliverables have to be delivered according to Table 2 and associated guidelines. The authors are to comply with general recommendations given for scientific and technical reporting and publishing such as use of references, citations, and publisher or authority specific guidelines. In most cases, the deliverables were processed and submitted as planned and following guidelines. In few cases, there were some delays that were resolved with additional meetings.

4.5.1 Approval process and storage

The approval process was described in D1.1. However, the approval and delivery process has been updated to reflect the feedback from the September 2023 consortium meeting,

see Table 2. A list of default partners responsible for providing a reviewer for each deliverable is given in Appendix III.

Table 2: Update of the delivery approval process

Step	When	What	Who	How
1	3 months before deadline	Information about deliverable and a reminder about the deadline – suggesting to start discussing the scope and outline	PM and PC to owner and reviewer	Automatic reminders
2	2 months before deadline	Reminder about deliverable and deadline – deliverable outline should be uploaded by owner	PM or PC to owner and reviewer	Automatic reminders
3	Day 1, 45 days before deadline	Reminder about deliverable and deadline	PM or PC to owner and reviewer	E-mail
4	Day 7, 38 days before deadline	Lead Author and Reviewer nomination sent to PC and PM	Deliverable owner	E-mail, update the deliverable status
5	Day 31, 14 days before deadline	Complete draft of deliverable content submitted to WP leader and the Reviewer	Lead Author	E-mail, update the deliverable status
6	Day 35, 10 days before deadline	Feedback on draft submitted by Reviewer and WP leader to Author	Reviewer	E-mail, phone, update the deliverable status
7	Day 38, 7 days before deadline	Final draft submitted to WP leader, Reviewer, and PC	Lead Author	E-mail, update the deliverable status
8	Day 40, 5 days before deadline	Latest day to provide remaining feedback on Author's changes by Reviewer and WP leader	Reviewer, WP leader	E-mail, update the deliverable status
9	Day 41, 4 days before deadline	Final version submitted to the PC and PM	Deliverable owner	E-mail, update the deliverable status
10	Day 43, 2 days before deadline	Approval from the PC	PC	Sign/date then scan and sent by e-mail to the PM

11	Day 45, due date	Submit the deliverable to the EC	PC and PM	Participant portal, update the deliverable status
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If the above dates correspond to a holiday, the deadlines will be brought forward or postponed to the nearest working day. During the delivery submission process, it is mandatory to use NextCloud where folders have been set up for this purpose.

To ensure the project's internal quality assurance for monitoring of deliverables and work progress, a review template has been created, see Appendix IV. A list of all deliverables is given in Appendix V, which has been updated regularly by the PC and PM.

4.6 Internal reporting

The update of the internal reporting is the following:

- Instead of the semi-annual written WP updates from the WP leaders to the PC and PM, monthly meetings are held between the PC, PM and WP leaders. The meetings have an agenda and are followed by minutes and action lists. During the meeting, the WP leaders are presenting progress of their WP and any issues arising since the previous meeting.
- Instead of the semi-annual dissemination and exploitation reports from partners to the PC and PM, these activities are reported during monthly WP leader meetings (via e-mail exchange, to be compiled into a report by the PC and PM). The templates have been set up by the PM on NextCloud and followed up during the WP leader as well as the project meetings.
- Annual reports from partners on the spending in terms of personal costs and other direct costs to the PM as per article 7.1.4 on Excess Payment in the consortium agreement. The 1st review of the financial costs was given at the September 2023 consortium meeting.
- Input from the partners for periodic reporting for the WP1 to the EC. The 1st periodic reporting is due at M20, end of January 2024.

4.6 Project reporting

The project reporting is well described in D1.1. The procedure and timelines remain the same as presented in Table 3 in D1.1. These procedures will be reviewed after the project's first reporting is finalised and then updated if needed.

5. Risk management

Risk management has been part of the project activities since the start and was described in D1.1.

5.1 Identification of risks

Ten management, scientific and technological risks that may compromise the implementation of the project and achievements of its objectives were identified previously in Table 6 in D1.1 and Appendix VI in this deliverable. Mitigation actions have also been proposed. These risks have been re-evaluated during the meetings and updated (see

Appendix VI). In addition, two new risks related to openness and standardisation have been identified and added to the risk table.

5.2 Qualification of risks

The assessment of the risks, their ranking and status have also been monitored and updated using the template in Appendix VI.

5.3 Management of risks

The management of risks continues in the project as described in D1.1.

5.4 Monitoring of risks

The PC and PM will continue to monitor and assess risks together with the GA, and as described in D1.1. In addition, the risk table specifies specific monitoring responsibility for each risk, depending on which WP it is related to.

6. Conclusion

This deliverable provides a half-time evaluation of the management procedures and tools, as well as quality assurance procedures as described in D1.1. and any adjustments for the second half of the project. The main updates that have been covered are the following:

- Update of the meetings planned in the project (Table 1).
- Update of the deliverable review process.
- Update of the WP updates.
- Update of the dissemination and exploitation reporting.
- Update of the risk table (Appendix VI).

Concluding, the Onto-DESIDe project has been progressing as planned with few changes of the management and the quality assurance.

Appendix I: Recommendations from the EEAB for follow-up

EEAB Recommendation Table					
No	Meeting	Recommendation (EEAB Member)	Partner	Followed up?	Status
1	Kick-off meeting (online)	Agree on definitions of terms used in the project, such as “value” (Hans Kröder)	UHAM	In several meetings, and concretely by the work in WP5.	Managed in direct discussions between Hans and WP5.
2	2 nd consortium meeting in the Hague	Align to and use the emerging CE standards, and results from related projects (Hans Kröder)	LIU	Regarding standards in T2.4, and otherwise in discussions with related project by the PC	D2.7 delivered M18, several meetings held with related projects
3	2 nd consortium meeting in the Hague	Start with a “minimal” scenario and platform setup, for the first evaluation iteration (Oscar Corcho)	LIU (followed up in WP6)	Several meetings on evaluation scenario in summer 2023.	Initial dataset outlines in D6.4, and scenarios from the textile and construction use cases available.
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Appendix II – Template for GA and EEAB meetings

General Assembly agenda example:

1. Welcome and introduction of participants
2. General information from PC and PM, including external information from PO
3. WP1 update by PM
4. WP2-6 update(s) – for all relevant active WPs, by WP leaders
 - a. WP progress including upcoming and recently completed deliverables
 - b. Risks
 - c. Other issues
5. WP7 update and discussion, by task leaders
 - a. Communication progress and opportunities
 - b. Dissemination progress and opportunities
 - c. Exploitation opportunities and plans
 - d. Training opportunities
6. Other decision points
7. Future meeting date(s) & location(s)

EEAB meeting agenda example:

1. Welcome and introduction of participants
2. Objectives of the meeting
3. Presentation of project overview and status of activities
4. Comments on the overall vision and direction of the project from the EEAB
5. Proposals from the EEAB on specific WPs/tasks and activities
6. Other suggestions from the EEAB

Appendix III – Deliverable review responsibilities

WP No	No	Deliverable Title	Lead Beneficiary	Review responsible partner	Due Date
WP1	D1.1	Management and Quality Assurance Report - v.1	LIU	RS	31 Jul 2022
WP1	D1.2	Management and Quality Assurance Report - v.2	LIU	UHAM	30 Nov 2023
WP1	D1.3	Ethics assessment report v1	LIU	UHAM	31 May 2023
WP1	D1.4	Ethics assessment report v2	LIU	CIRC	31 May 2024
WP1	D1.5	Ethics assessment report v3	LIU	REIA	31 May 2025
WP2	D2.1	Project requirements specification and research methodology - v.1	RS	LIU	30 Nov 2022
WP2	D2.2	Project requirements specification and research methodology - v.2	RS	LIU	31 Jan 2024
WP2	D2.3	Project requirements specification and research methodology - v.3	RS	LIU	31 Oct 2024
WP2	D2.4	Software and protocol releases - v.1	RS	CIRC	31 May 2023
WP2	D2.5	Software and protocol releases - v.2	RS	CIRC	31 May 2024
WP2	D2.6	Software and protocol releases - v.3	RS	CIRC	28 Feb 2025
WP2	D2.7	Standardisation plan - v.1	POS	REIA	30 Nov 2023
WP2	D2.8	Standardisation plan - v.2	POS	CIRC	30 Nov 2024
WP3	D3.1	Ontology network architecture, methodology and alignment plan - v.1	LIU	UHAM	28 Feb 2023
WP3	D3.2	Ontology network architecture, methodology and alignment plan - v.2	LIU	UHAM	31 May 2024
WP3	D3.3	FAIR integrated ontology network - v.1	LIU	IMEC	31 Mar 2023
WP3	D3.4	FAIR integrated ontology network - v.2	LIU	IMEC	31 Mar 2024
WP3	D3.5	FAIR integrated ontology network - v.3	LIU	IMEC	31 Dec 2024
WP3	D3.6	FAIR integrated ontology network - v.4	LIU	IMEC	28 Feb 2025
WP3	D3.7	Ontology maintenance plan	LIU	FAS	28 Feb 2025
WP4	D4.1	Digital twin concept design, including ontology-based data sharing platform architecture and methodology - v.1	IMEC	RS	28 Feb 2023
WP4	D4.2	Digital twin concept design, including ontology-based data sharing platform architecture and methodology - v.2	IMEC	RS	31 May 2024
WP4	D4.3	Digital twin concept design, including ontology-based data sharing platform architecture and methodology - v.3	IMEC	RS	28 Feb 2025
WP4	D4.4	Open circularity platform - v.1	IMEC	CON	31 Mar 2023
WP4	D4.5	Open circularity platform - v.2	IMEC	CON	31 Mar 2024
WP4	D4.6	Open circularity platform - v.3	IMEC	CON	31 Dec 2024
WP4	D4.7	Open circularity platform - v.4	IMEC	CON	28 Feb 2025
WP5	D5.1	State of knowledge review	UHAM	RS	28 Feb 2023
WP5	D5.2	Multi flow circular value network design & development method - v.1	UHAM	RS	31 May 2024
WP5	D5.3	Multi flow circular value network design & development method - v.2	UHAM	RS	31 May 2025
WP6	D6.1	Use case needs analysis and circular value flow mapping - v.1	CIRC	LIU	31 Aug 2022
WP6	D6.2	Use case needs analysis and circular value flow mapping - v.2	CIRC	LIU	30 Nov 2023
WP6	D6.3	Use case needs analysis and circular value flow mapping - v.3	CIRC	LIU	31 Aug 2024
WP6	D6.4	Resulting research data sets - v.1	CIRC	IMEC	31 May 2023

WP6	D6.5	Resulting research data sets - v.2	CIRC	IMEC	31 May 2024
WP6	D6.6	Resulting research data sets - v.3	CIRC	IMEC	28 Feb 2025
WP6	D6.7	Report on evaluation results - v.1	CIRC	LIU	30 Nov 2023
WP6	D6.8	Report on evaluation results- v.2	CIRC	LIU	31 Aug 2024
WP6	D6.9	Report on evaluation results - v.3	CIRC	LIU	31 May 2025
WP7	D7.1	Dissemination and communication plan - v.1	LIU	UHAM	30 Nov 2022
WP7	D7.2	Dissemination and communication plan - v.2	LIU	UHAM	30 Nov 2023
WP7	D7.3	Dissemination and communication plan - v.3	LIU	UHAM	31 May 2025
WP7	D7.4	Exploitation and Data Management Plan - v.1	LIU	POS	30 Nov 2022
WP7	D7.5	Exploitation and Data Management Plan - v.2	LIU	POS	30 Nov 2023
WP7	D7.6	Exploitation and Data Management Plan - v.3	LIU	POS	31 May 2025
WP7	D7.7	Training material	UHAM	FAS	31 May 2025
WP8	D8.1	OEI - Requirement No. 1	LIU	UHAM	31 Aug 2022

*green colour means submitted deliverable

Appendix IV – Internal review report template

Internal Review Report			
Report		Title	
Work package		WP title	
Task no		Task title	
Author(s)			
Date of review			
Document file name			
General comments			

Quality assurance:

Who	Name
Reviewer 1	
Reviewer 2	

#	Document review aspect	Comment/Request for updates
1	Are deliverable title, number, type and dissemination level in accordance with the DoA?	
2	Is the deliverable following the template (project branding, front page, document history, table of contents, list of figures & tables, fonts used, headings, spacing, captions, page numbers, etc.)?	
3	Are the objectives of the deliverable and its reported results/activities clearly stated? Is the deliverable consistent with its objectives and in line with its definition in the DoA? If this is not the case, is there a justification for the deviation?	
4	Does the document contain an “Executive summary”/”Abstract” section, and an “Introduction” correctly positioning the deliverable in the project and defining its objectives? Is the summary sufficiently informative, when read as a standalone text?	
5	If relevant, does the deliverable explain its relationship with other project deliverables (including other versions of this deliverable – past and future)?	

6	Is the organization and layout of the deliverable satisfactory (e.g. section structure with introduction and objectives, methods, results, conclusions, bibliography, etc.)?	
7	Is the scientific / technical approach sound, adequate and state of the art?	
8	Are interpretations of results and conclusions sound, justified by the data and consistent with the objectives of the deliverable?	
9	Is the quantity, quality and level of detail of data/information presented inside the report adequate to make the work verifiable and/or results reproducible by others? Is data published in addition to the deliverable/report document? If yes, is that data accessible and appropriately documented?	
10	Does the content justify the length?	
11	Are the figures and tables all necessary and correctly referenced? Are the figures and tables complete (e.g. content, numbers and captions), clearly presented and of good quality? Are there figures/tables missing?	
12	Are the references cited relevant and up to date? Are all the cited references in the bibliography and are all references in the bibliography used in the text?	
13	Is the deliverable written in appropriate language, with good syntax and grammar, and adequate language for the target group(s)? Are symbols and abbreviations explained?	
14	Do hyperlinks and references work?	
15	Additional comments and suggestions to the author(s) (if any)	

Appendix V – Deliverable list and monitoring

Deliverables												
Work Package No	Deliverable Related No	Deliverable No	Deliverable Name	Description	Lead Beneficiary	Type	Dissemination Level	Due Date	New Due Date (if delay)	Delivery Date	Approval Date	Status
WP1	D1.1	D1	Management and Quality Assurance Report - v.1	The first version will outline the planned management procedures and tools to be used for project management and reporting, as well as quality assurance and benchmarking of all delivered artefacts. The second version will in addition include a half-time evaluation of the management procedures and tools, as well as quality assurance procedures, in use, and any adjustments for the second half of the project.	LIU	R	PU	31 Jul 2022				Submitted
WP6	D6.1	D28	Use case needs analysis and circular value flow mapping - v.1	Report describing the industrial needs from the perspective of the three use cases, and a detailed mapping of the targeted value flows in each use case. Updates in M18 and M27 to reflect new and changed needs identified after first and second prototype evaluation.	CIRC	R	PU	31 Aug 2022	30-Sep-22			Submitted
WP8	D8.1	D44	OEI - Requirement No. 1	This research would benefit from an independent ethics advisor. The necessary background would have to include privacy and data protection issues on one side and the knowledge of the EU Ethics Appraisal process on the other side. It is recommended that the advisor submits yearly reports to the PO (so that the PO has sufficient information on the ethics compliance aspects of the project before reporting period 1 and project review as well as before the final review on M36).	LIU	ETHICS	SEN	31 Aug 2022				Submitted
WP2	D2.1	D3	Project requirements specification and research methodology - v.1	Initial set of requirements for prototype 1 summarised at M6, extended and updated versions for prototype 2 and 3 delivered at M20 and 29 respectively. Report will also include a section on research methodology.	RS	R	PU	30 Nov 2022				Submitted
WP7	D7.1	D37	Dissemination and communication plan - v.1	Report detailing the communication and dissemination activities planned, revised in M18, and including a summary of the carried out activities in M36.	LIU	R	PU	30 Nov 2022				Submitted
WP7	D7.4	D40	Exploitation and Data Management Plan - v.1	Detailed data management plan, including the plans for open source and open access publishing, as well as exploitation plans and opportunities identified. To be updated at M18 and M36.	LIU	R	PU	30 Nov 2022				Submitted
WP3	D3.1	D11	Ontology network architecture, methodology and alignment plan - v.1	Report describing the tailored ontology development methodology, the ODP catalogue and the overall ontology network architecture, as well as alignment strategies and plans.	LIU	R	PU	28 Feb 2023				Submitted
WP4	D4.1	D18	Digital twin concept design, including ontology-based data sharing platform architecture and methodology - v.1	Description of the digital twin concept, including the technical design and architecture of the ontology-based data sharing platform, encompassing data transformation, retrieval and querying. In v2 also encompassing verifiable statements and credentials, i.e. targeting legal, ethical, security and privacy aspects.	IMEC	R	PU	28 Feb 2023				Submitted
WP5	D5.1	D25	State of knowledge review	Overview of the current knowledge in the field, scoped by the requirements from WP2.	UHAM	R	PU	28 Feb 2023	30-Apr			Submitted
WP3	D3.3	D13	FAIR integrated ontology network - v.1	Releases of the ontology network itself, including online documentation, with change management requests until deliverable date.	LIU	OTHER	PU	31 Mar 2023				Submitted
WP4	D4.4	D21	Open circularity platform - v.1	Software releases, including documentation, to be integrated by WP2, with final change request management until the deliverable date.	IMEC	OTHER	PU	31 Mar 2023				Submitted
WP1	D1.3	D45	Ethics assessment report v1	First version of the ethics assessment report, but the external ethics advisor.	LIU	R	SEN	31 May 2023				Submitted
WP2	D2.4	D6	Software and protocol releases - v.1	Documented software, including data documentation and sharing protocols, released in the three project iterations.	RS	OTHER	PU	31 May 2023				Submitted
WP6	D6.4	D31	Resulting research data sets - v.1	Research datasets to be partly used for technical development, e.g. technical testing in WPs 2-4, as well as to be used for the use case-based evaluations in T6.1-3.	CIRC	DATA	SEN	31 May 2023				Submitted
WP1	D1.2	D2	Management and Quality Assurance Report - v.2	The first version will outline the planned management procedures and tools to be used for project management and reporting, as well as quality assurance and benchmarking of all delivered artefacts. The second version will in addition include a half-time evaluation of the management procedures and tools, as well as quality assurance procedures, in use, and any adjustments for the second half of the project.	LIU	R	PU	30 Nov 2023				Pending
WP2	D2.7	D9	Standardisation plan - v.1	First version will target an overview of existing standards the project will align to and use, while the second version will add a standardisation plan for the ontologies and protocols developed by the project.	POS	R	PU	30 Nov 2023				Pending
WP6	D6.2	D29	Use case needs analysis and circular value flow mapping - v.2	Report describing the industrial needs from the perspective of the three use cases, and a detailed mapping of the targeted value flows in each use case. Updates in M18 and M27 to reflect new and changed needs identified after first and second prototype evaluation.	CIRC	R	PU	30 Nov 2023				Pending
WP6	D6.7	D34	Report on evaluation results - v.1	Report on the evaluation results from each use case, regarding prototypes 1-3 in each version of the deliverable respectively.	CIRC	R	PU	30 Nov 2023				Pending
WP7	D7.2	D38	Dissemination and communication plan - v.2	Report detailing the communication and dissemination activities planned, revised in M18, and including a summary of the carried out activities in M36.	LIU	R	PU	30 Nov 2023				Pending
WP7	D7.5	D41	Exploitation and Data Management Plan - v.2	Detailed data management plan, including the plans for open source and open access publishing, as well as exploitation plans and opportunities identified. To be updated at M18 and M36.	LIU	R	PU	30 Nov 2023				Pending

WP2	D2.2	D4	Project requirements specification and research methodology - v.2	Initial set of requirements for prototype 1 summarised at M6, extended and updated versions for prototype 2 and 3 delivered at M20 and 29 respectively. Report will also include a section on research methodology.	RS	R	PU	31 Jan 2024				Pending
WP3	D3.4	D14	FAIR integrated ontology network - v.2	Releases of the ontology network itself, including online documentation, with change management requests until deliverable date.	LIU	OTHER	PU	31 Mar 2024				Pending
WP4	D4.5	D22	Open circularity platform - v.2	Software releases, including documentation, to be integrated by WP2, with final change request management until the deliverable date.	IMEC	OTHER	PU	31 Mar 2024				Pending
WP1	D1.4	D46	Ethics assessment report v2	Second version of ethics assessment report by external ethics advisor.	LIU	R	SEN	31 May 2024				Pending
WP2	D2.5	D7	Software and protocol releases - v.2	Documented software, including data documentation and sharing protocols, released in the three project iterations.	RS	OTHER	PU	31 May 2024				Pending
WP3	D3.2	D12	Ontology network architecture, methodology and alignment plan - v.2	Report describing the tailored ontology development methodology, the ODP catalogue and the overall ontology network architecture, as well as alignment strategies and plans.	LIU	R	PU	31 May 2024				Pending
WP4	D4.2	D19	Digital twin concept design, including ontology-based data sharing platform architecture and methodology - v.2	Description of the digital twin concept, including the technical design and architecture of the ontology-based data sharing platform, encompassing data transformation, retrieval and querying. In v2 also encompassing verifiable statements and credentials, i.e. targeting legal, ethical, security and privacy aspects.	IMEC	R	PU	31 May 2024				Pending
WP5	D5.2	D26	Multi flow circular value network design & development method - v.1	Description of the developed methods, in v2 including a 'how-to' guide or manual aimed at a business audience.	UHAM	R	PU	31 May 2024				Pending
WP6	D6.5	D32	Resulting research data sets - v.2	Research datasets to be partly used for technical development, e.g. technical testing in WPs 2-4, as well as to be used for the use case-based evaluations in T6.1-3.	CIRC	DATA	SEN	31 May 2024				Pending
WP6	D6.3	D30	Use case needs analysis and circular value flow mapping - v.3	Report describing the industrial needs from the perspective of the three use cases, and a detailed mapping of the targeted value flows in each use case. Updates in M18 and M27 to reflect new and changed needs identified after first and second prototype evaluation.	CIRC	R	PU	31 Aug 2024				Pending
WP6	D6.8	D35	Report on evaluation results- v.2	Report on the evaluation results from each use case, regarding prototypes 1-3 in each version of the deliverable respectively.	CIRC	R	PU	31 Aug 2024				Pending
WP2	D2.3	D5	Project requirements specification and research methodology - v.3	Initial set of requirements for prototype 1 summarised at M6, extended and updated versions for prototype 2 and 3 delivered at M20 and 29 respectively. Report will also include a section on research methodology.	RS	R	PU	31 Oct 2024				Pending
WP2	D2.8	D10	Standardisation plan - v.2	First version will target an overview of existing standards the project will align to and use, while the second version will add a standardisation plan for the ontologies and protocols developed by the project.	POS	R	PU	30 Nov 2024				Pending
WP3	D3.5	D15	FAIR integrated ontology network - v.3	Releases of the ontology network itself, including online documentation, with change management requests until deliverable date.	LIU	OTHER	PU	31 Dec 2024				Pending
WP4	D4.6	D23	Open circularity platform - v.3	Software releases, including documentation, to be integrated by WP2, with final change request management until the deliverable date.	IMEC	OTHER	PU	31 Dec 2024				Pending
WP2	D2.6	D8	Software and protocol releases - v.3	Documented software, including data documentation and sharing protocols, released in the three project iterations.	RS	OTHER	PU	28 Feb 2025				Pending
WP3	D3.6	D16	FAIR integrated ontology network - v.4	Releases of the ontology network itself, including online documentation, with change management requests until deliverable date.	LIU	OTHER	PU	28 Feb 2025				Pending
WP3	D3.7	D17	Ontology maintenance plan	Report describing the ontology maintenance plan and evolution strategies, beyond the project.	LIU	R	PU	28 Feb 2025				Pending
WP4	D4.3	D20	Digital twin concept design, including ontology-based data sharing platform architecture and methodology - v.3	Description of the digital twin concept, including the technical design and architecture of the ontology-based data sharing platform, encompassing data transformation, retrieval and querying. In v2 also encompassing verifiable statements and credentials, i.e. targeting legal, ethical, security and privacy aspects.	IMEC	R	PU	28 Feb 2025				Pending
WP4	D4.7	D24	Open circularity platform - v.4	Software releases, including documentation, to be integrated by WP2, with final change request management until the deliverable date.	IMEC	OTHER	PU	28 Feb 2025				Pending
WP6	D6.6	D33	Resulting research data sets - v.3	Research datasets to be partly used for technical development, e.g. technical testing in WPs 2-4, as well as to be used for the use case-based evaluations in T6.1-3.	CIRC	DATA	SEN	28 Feb 2025				Pending
WP1	D1.5	D47	Ethics assessment report v3	Third and final ethics assessment report by the external ethics advisor.	LIU	R	SEN	31 May 2025				Pending
WP5	D5.3	D27	Multi flow circular value network design & development method - v.2	Description of the developed methods, in v2 including a 'how-to' guide or manual aimed at a business audience.	UHAM	R	PU	31 May 2025				Pending
WP6	D6.9	D36	Report on evaluation results - v.3	Report on the evaluation results from each use case, regarding prototypes 1-3 in each version of the deliverable respectively.	CIRC	R	PU	31 May 2025				Pending
WP7	D7.3	D39	Dissemination and communication plan - v.3	Report detailing the communication and dissemination activities planned, revised in M18, and including a summary of the carried out activities in M36.	LIU	R	PU	31 May 2025				Pending
WP7	D7.6	D42	Exploitation and Data Management Plan - v.3	Detailed data management plan, including the plans for open source and open access publishing, as well as exploitation plans and opportunities identified. To be updated at M18 and M36.	LIU	R	PU	31 May 2025				Pending
WP7	D7.7	D43	Training material	Training material online.	UHAM	DEC	PU	31 May 2025				Pending

Appendix VI – Risk list and monitoring form

Risk factor (Table 6)	Impact qualification (Table 7)	Probability qualification (Table 7)	Priority (Table 7)	Owner	Status and explanation
R1	High	Low	4	RS (WP2 leader)	(Will be monitored once first set of requirements are agreed in WP2)
R2	Medium	Medium	3	PC	(Related to both technical development in all WPs and the evaluations in WP6, will be monitored by PC throughout the project as soon as technical development starts, in close collaboration with WP6 and WP2 leaders.)
R3	High	Low	4	CIRC (WP6 leader)	(Will be monitored as soon as data collection start in WP6)
R4	Medium	Low	5	LIU (WP3 leader)	(Will be monitored as soon as WP3 starts)
R5	High	Low	4	IMEC (WP4 leader)	(Will be monitored as soon as WP4 starts)
R6	Medium	Low	5	RS (WP2 leader)	(Will be monitored as soon as technical development starts in WP3 and 4, and subsequent integration in WP2)
R7	High	Low	4	PC	Continuously monitored by PC, to ensure the appropriate involvement of all partners in meetings and tasks. Current focus is on involvement in use case descriptions of D6.1, as well as all partners participating in consortium meeting.
R8	Medium	Medium	3	RS (WP2 leader)	Currently mitigated through ensuring close collaboration between WP2 and WP6 during the initial use case description development for D6.1

R9	Medium	Medium	3	PM	Monitoring the status of the involved partner organisations, ensuring that all key personnel has appointed deputies, collecting contact information to all parties etc.
R10	Medium	Low	5	PM & PC	Setting up and describing internal communication and coordination procedures as described in this document (D1.1) as well as technical support and templates (towards Milestone 1)
New risks added					
R11	High	Medium	2	CIRC (WP6 leader)	Openness of the project, e.g. open source code, FAIR publishing, and public deliverables, might become a problem for the industry partners. In D6.1 this was mitigated by not mentioning the actual stakeholders but merely their types and categories.
R12	High	Low	4	POS (lead of the standardisation task T2.4)	Many standards in the area are still emerging, and can only partly be taken into account at this point since they are not fixed. This could result in poor alignment to standards at the end of the project. Currently mitigated by doing a thorough overview of standards and existing ontologies in WP2, 3 and 4.
R13					