



Self Assessment Towards Optimization of Building Energy

Deliverable 9.1

Project Management Handbook

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EXECUTIVE SUMMARY

The Project Management Handbook is an agreement between the Project Partners¹ on the common project work procedures and internal communication. General rules for the project cooperation are outlined in the document. The handbook shall be discussed and reviewed and approved by the Project Partners.

The whole project is based on cooperation and Partnership. Only by working together, the Project Partners may achieve the project goals. All Partners must be aware of their responsibilities and duties and of the content of the Project Management Handbook, and give all the necessary support to the Work Package Leaders and the Task Leaders on their work.

This document deals only with internal project issues and procedures.

If any conflict between this document and the Grant Agreement (GA) arises, the GA will prevail over the Project Management Handbook.

Any mention to the GA refers to "Grant Agreement number: 957128 – SATO – H2020-LC-SC3-2018-2019-2020 / H2020-LC-SC3-EE-2020-1".

¹ Annex 1 presents the list of Partner organizations

1. Work Breakdown Structure

1.1. Overall structure of the work plan

SATO work plan structure is designed to efficiently implement the project approach and to address its objectives. The project is organized in nine work packages over thirty-six months.

The work structure is fully aligned with the project goals and milestones. It has been designed to ensure technical feasibility within certainly defined tasks, assigning core responsibilities according to each involved Partner core expertise. Each Work Package (WP) is characterized by well-defined objectives and measurable outcomes.

To ensure an integrated demonstration with clear pathways towards commercial exploitation, the crosscutting/overarching WPs of the SATO work plan are allocated in four phases (listed in Table 1) aiming at a broad uptake of the developed solutions as well as replication across the demonstration sites. Each of the demonstration sites is incorporated in one task according to the pilot type, while respecting the differences in regional stakeholders, regulations, and agreements with stakeholders (e.g. on data).

Table 1: Work plan phases

Phase	Phase title
Phase I	Requirements and specifications
Phase II	Development
Phase III	Demonstration
Phase IV	Uptake, exploitation, and replication

Figure 1 represents the SATO project overall approach and methodology. In line with the Four-Phase approach, SATO work packages are well-defined in their interfaces, as shown in the figure.

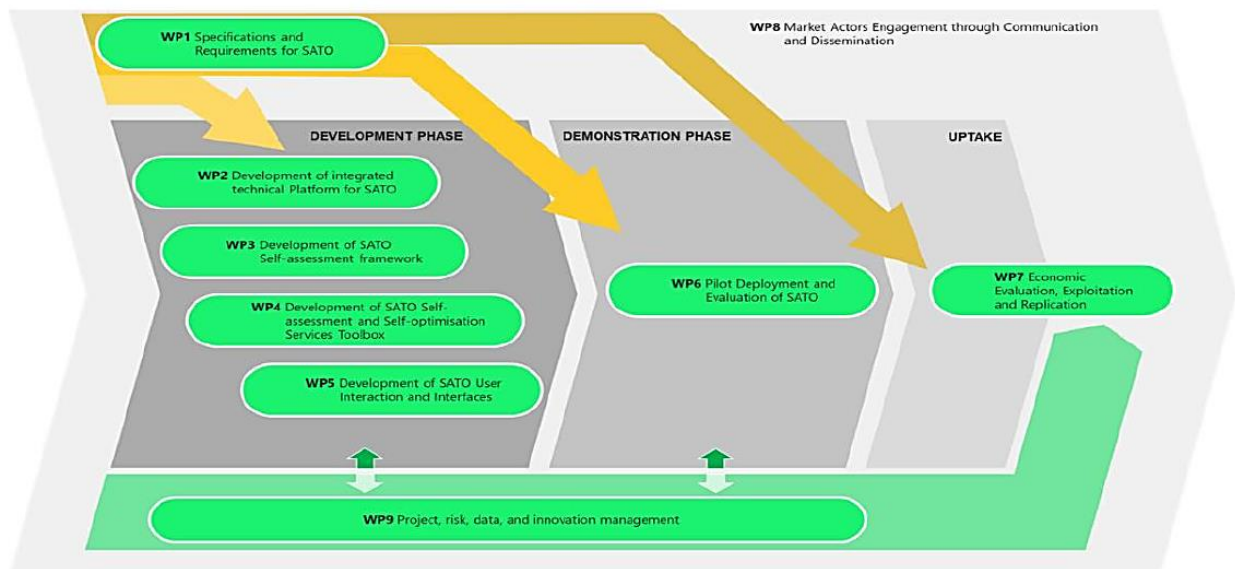


Figure 1: SATO project methodology

The overarching and continuously designed WP1 facilitates a harmonized and consistent handling of key issues throughout the project and establishes the fundamental requirements and specifications of the

three subsequent phases, namely the Development Phase, the Demonstration Phase and the Uptake Phase. This design will ensure a continuous iteration of the requirements of the concept while it simultaneously enables the developers to integrate the users feedback in all phases of SATO. Furthermore, this specific design will secure the efficient and solid development of the SATO platform, the Self-Assessment Framework, the SATO Services tool set and user interfaces as well as the user engagement strategies within the Development Phase of the project (carried out in WP2 to WP5).

The developments are directed towards a user-centred approach, taking into consideration the user inputs collected during each phase of the project. In WP2, the technical infrastructure for the cloud-based platforms will be developed and integrated into an aggregated platform serving as a nutritious ecosystem upon which the self-assessment and self-optimization services of the project will be developed in WP3 and WP4. This development and integration process will be accompanied by a sound evaluation and validation that shall focus on quantitative and qualitative KPIs.

The users feedback will be a guideline for the development of the concept towards the user by incorporating this in WP5. To allow adjustments of the development streams in WP2 to WP5, each of the development tasks is designed sequentially to address the feedback received during the demonstration phase. Hence, the developments yield in a first prototype that will be validated during the Demonstration Phase and streamlined into a commercially available product.

To evaluate and validate the developed solutions, the concept is deployed in eight comprehensive demonstrators in WP6, which will seamlessly integrate smart systems, smart controls and smart appliances into existing buildings, and demonstrate how the self-assessments developed in WP3 allow improved, user-centered (WP5), self-optimized energy management services developed in WP4.

The validation and evaluation of the results of the operational experiments in the pilots will set the foundation to design the replication and exploitation plans in WP7. Moreover, the compliance and certification of the developed solutions will be guaranteed.

The four-phase work plan is closely accompanied by WP8 which will focus on the communication and dissemination of the project process and results, aiming to engage a wide range of different market actors and stakeholders throughout the entire project runtime.

Finally, the objectives of WP9 are to ensure the activities are conducted in accordance to the plan and budget, with high levels of quality, safety and synergy between the Partners.

1.1.1. Work packages list

For a better understanding of each existing WP, each related period of execution, and the corresponding lead participant, Table 2 provides a summary.

Table 2: Work packages list

WP no.	WP title	Lead participant	PMs	Start month	End month
1	Specifications and Requirements for SATO	EDP CNET	93	1	36
2	Development of integrated technical Platform for SATO	FC.ID	85	4	33
3	Development of SATO Self-assessment framework	AAU	174	3	33
4	Development of SATO Self-assessment and Self-optimization Service Toolbox	FC.ID	128	7	33

5	Development of SATO User Interaction and Interfaces	CYPE	55	8	33
6	Pilot Deployment and Evaluation of SATO	EDP CNT	136	16	36
7	Economic Evaluation, Exploitation and Replication	CORE	31	1	36
8	Market Actors Engagement through Communication and Dissemination	POLIMI	65	1	36
9	Project, risk, data and innovation management	FC.ID	47	1	36

1.2. Timing of SATO’s work packages, tasks and deliverables

Figure 2 represents SATO’s WP, tasks and deliverables through time and also shows who’s the WP leader of each WP and who’s the task leader of each task.

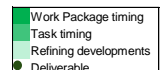
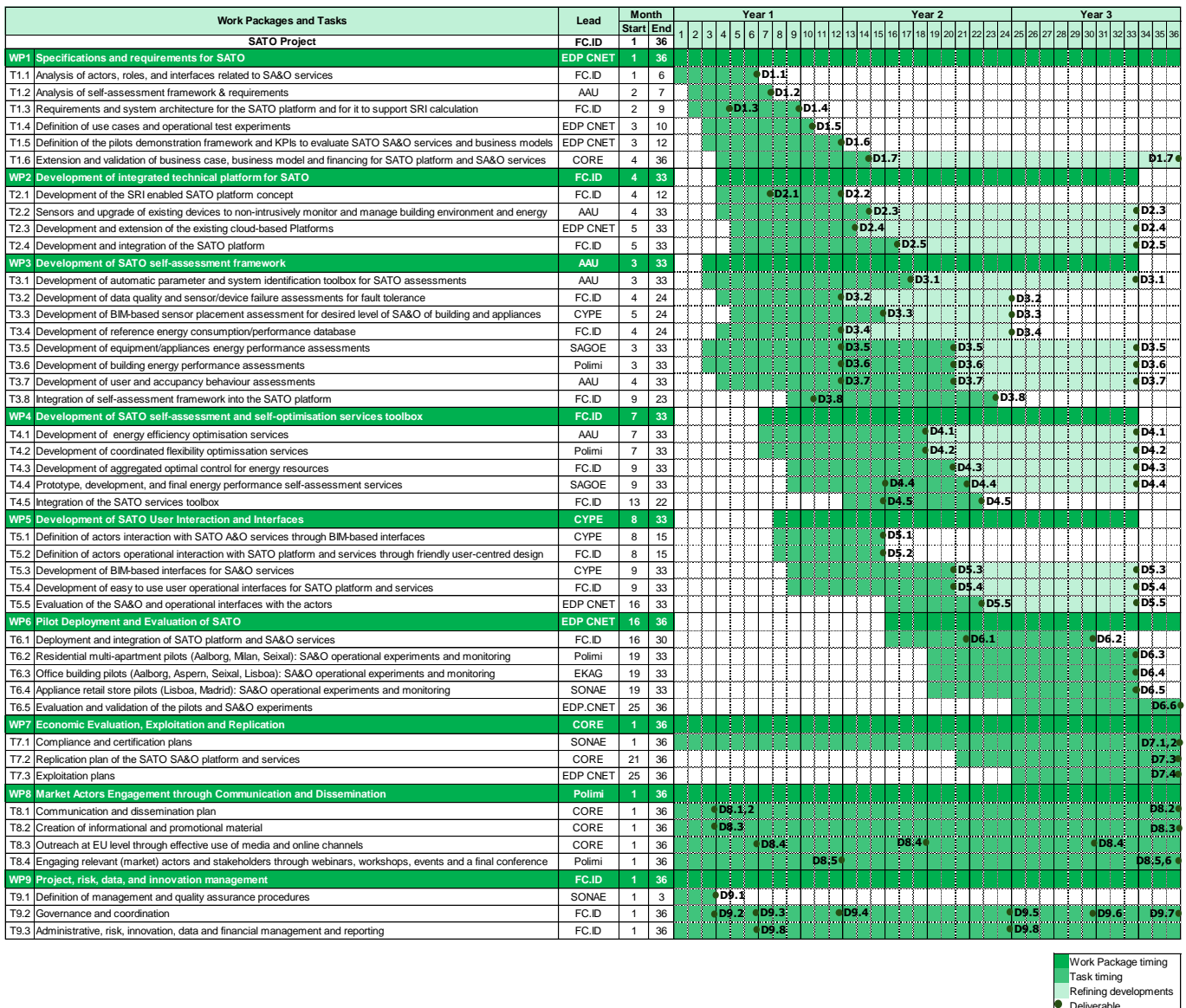


Figure 2: Timing of SATO’s WP, tasks and deliverables

2. Organizational Structure

The organization of the SATO project is structured according to the GA, as shown in Figure 3.

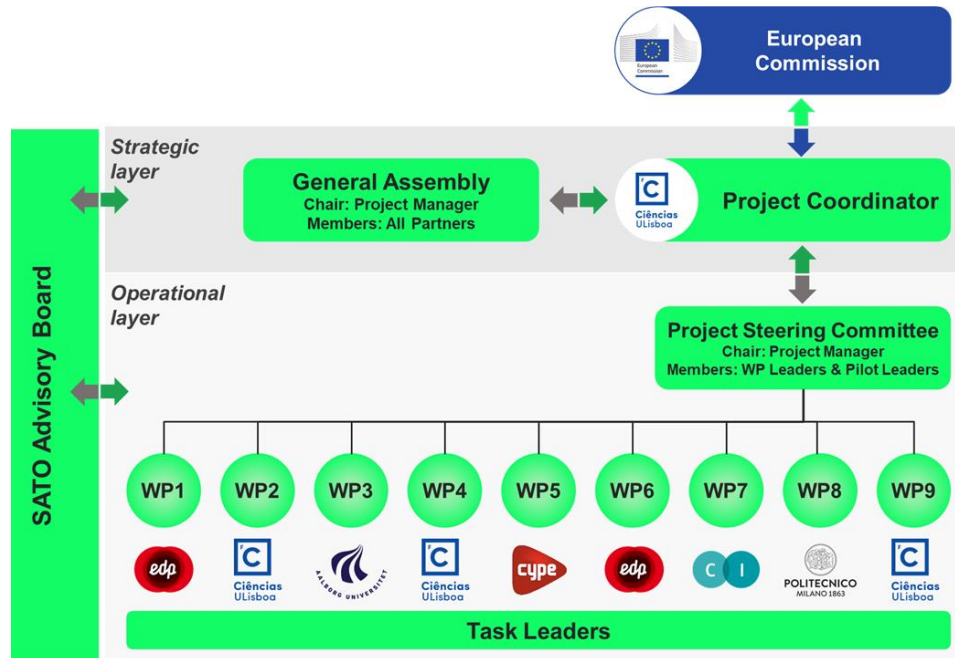


Figure 3: Project management structure

SATO organizational structure is designed towards the specific characteristics of the composition of the Consortium. The Project Management Structure chosen deals with the governance structure, the role and responsibilities of the various actors and the contract with the European Commission (EC or Commission).

The overall management, communication and coordination between the different Partners and stakeholders, as well as the monitoring of the scientific and technical progress of the entire project, by means of the supervision of the achieved milestones, the management of the risks and establishment of contingency plans, gender equality, and other non-technical aspects is incorporated by the Project Management Structure. Besides, it provides outputs for knowledge management and other R&D&I related activities, such as Intellectual Property Rights (IPR) and dissemination, solving problems as they may arise. Furthermore, it promotes networking with other related projects, networks, and other initiatives.

2.1. Governance structure

The overall Project Management framework, organizational structure and decision-making mechanisms, have been accommodated to the size and complexity of the project. A project involving sixteen Partners requires a large number of decisions which have to be managed and adopted in an effective manner but with a global view of the whole project.

2.1.1. Strategic layer

The strategic layer of the general management structure of SATO includes the Project Coordinator (PC), the General Assembly (GA) and the Management Support Team (MST). The following sections summarize these two entities and the different roles they play to cooperate and interact to guarantee a smooth coordination and management of the project.

2.1.1.1. Project Coordinator

The main responsibility of the PC is to ensure the timely and effective overall progress of the project according to the GA. The PC, assisted by the PC resources, and supported by the Project Steering Committee and the Management Support Team, is responsible for the day-to-day administrative, legal and financial issues. Namely:

1. Ensuring the timely and effective overall progress of the project;
2. Monitoring compliance by the Partners to their obligations;
3. Keeping the address list of members and other contact persons updated and available;
4. Acting as an interface between the Consortium and the EC – assuring the circulation of respective information and communications;
5. Collecting and reviewing to verify consistency and submitting reports, other deliverables and specific requested documents to the Funding Authority;
6. Transmitting documents and information connected with the project to any other Partners concerned;
7. Providing, upon request, the Partners with official copies or originals of documents that are in his sole possession when such copies or originals are necessary for the Partners to present claims;
8. Organizing Project Steering Committee meetings, project reviews and co-ordination of dissemination and exploitation events;
9. Managing all the aspects connected with payment of financial contributions.

If one or more of the Partners are late in submission of any project deliverable, the PC may nevertheless submit the other Partners' project deliverables and all other documents required by the GA to the Funding Authority in time. If the PC fails in its coordination tasks, the General Assembly may propose to change the PC to the Funding Authority.

The PC shall not be entitled to act or to make legally binding declarations on behalf of any other Partner or of the Consortium, unless explicitly stated otherwise in the GA or the CA. Furthermore, the PC shall not enlarge its role beyond the tasks specified in the CA and in the GA.

SATO PC is FC.ID, a non-profit private association, endowed with legal personality, which brings to the project a wealth of experience in the participation of EU projects, ensuring that SATO satisfies the needs of the EC and the Consortium.

2.1.1.2. General Assembly

The Sato General Assembly is the high-level management body of the SATO project in which all participants are represented and is also the ultimate decision-making body of the Consortium. It is chaired by the PC (unless decided otherwise in a General Assembly meeting) and its membership consists of at least one representative from each Partner, hereinafter General Assembly Member, that each shall have a deputy.

The General Assembly is responsible for the approval of the management structure, the project direction and the CA and will be responsible for all important decisions of general nature within the frame of the GA signed with the EC and the CA signed among all Partners, especially when such decisions may affect the agreements reached in these two contracts, as in the cases of, but not limited to: changes in the management structure, changes in the Consortium composition, changes in the work plan, major technical decisions, contingency plans and planning decisions affecting the resources or the time for the implementation of the project.

The Partners agree to abide by all decisions of General Assembly, but this does not prevent them to submit a dispute to resolution in accordance with the provisions of Settlement of disputes in Section 11.8 of the CA.

General Assembly shall be free to act on its own initiative to formulate proposals and make decisions. In addition, all proposals made by the Project Steering Committee shall also be considered and decided upon by it.

The following decisions shall be taken by General Assembly:

1. Content, finances and intellectual property rights, namely:
 - a. Proposals for changes to Annexes 1 and 2 of the GA to be agreed by the Funding Authority;
 - b. Changes to the Consortium Plan;
 - c. Modifications to Attachment 1 of the CA;
 - d. Additions to Attachment 3 of the CA;
2. Evolution of the Consortium, namely:
 - a. Additions to Attachment 4 of the CA;
 - b. Entry of a new Partner to the Consortium and approval of the settlement on the conditions of the accession of such a new Partner;
 - c. Withdrawal of a Partner from the Consortium and the approval of the settlement on the conditions of the withdrawal;
 - d. Identification of a breach by a Partner of its obligations under the CA or the GA;
 - e. Declaration of a Partner to be a Defaulting Party according to what's defined in the CA;
 - f. Remedies to be performed by a Defaulting Party;
 - g. Termination of a Defaulting Party's participation in the Consortium and measures relating thereto;
 - h. Proposal to the Funding Authority for a change of the PC;
 - i. Proposal to the Funding Authority for suspension of all or part of the SATO project;

Proposal to the Funding Authority for termination of the SATO project and the CA.

2.1.1.3. Management Support Team

The Management Support Team (MST) shall be proposed by the PC and appointed by the Project Steering Committee. Its main job is to assist and facilitate the work of these two bodies.

The MST is composed of FC.ID staff, who shall provide assistance to the PC for executing the decisions of the General Assembly as well as the day-to-day management of the SATO project. In particular, the MST shall be responsible for the following tasks:

1. Operational responsibility for the project;
2. Interface towards the Funding Authority;
3. Administering the financial contribution of the Funding Authority and fulfilling the financial tasks described in section 7.3 of the CA;
4. Provide and maintain communication infrastructures and processes;
5. Assuring the knowledge and risk management;
6. Quality assurance.

2.1.2. Operational layer

The operational layer in the general management structure of SATO includes the Project Steering Committee (PSC), the Work Package Leaders (WPL) and the Task Leaders (TL). The following sections summarize these three entities, their organization and the different roles they play in relation to the project.

2.1.2.1. Project Steering Committee

The executive decision-making of the project is incorporated in the body of the PSC. Its role is to supervise the execution of the project and to decide about various management issues, specifically of technical, financial, exploitation, dissemination, planning and control matters, provided that these decisions do not entail major project and/or contractual issues managed by General Assembly.

The PSC will be responsible for commencing the strategic planning and direction of the project and monitoring:

1. The project's progress and the revision of milestones and risk assessment;

2. The establishment of the risk assessment and contingency plan and its follow-up;
3. The approval of the Stakeholder Management Plan and the revision of the Data Management Plan;
4. The approval of the periodic technical and financial reports, the final report and the project deliverables before submission to the EC;
5. The approval of networking activities with other related European projects and initiatives;
6. The approval of the dissemination and communication plan and of the exploitation plan, and their deployment.

Additionally, it has the responsibility to monitor the effective and efficient implementation of the project and it shall collect information, at least every six months, on the progress of the project, examine that information to assess the compliance of the project with the Consortium Plan and, if necessary, propose modifications of the Consortium Plan to the General Assembly.

This body shall, also, execute the following tasks:

1. Prepare meetings, propose decisions and prepare the agenda of General Assembly;
2. Seek a consensus among the Partners and be responsible for the proper execution and implementation of the decisions of General Assembly;
3. Agree on the Members of the MST, upon a proposal by the PC;
4. Support the PC in preparing meetings with the Funding Authority and in preparing related data and deliverables;
5. Prepare the content and timing of press releases and joint publications by the Consortium or proposed by the Funding Authority in respect to the procedures in Article 29 of the GA.

In the case of abolished tasks as a result of a decision of General Assembly, the PSC shall advise the General Assembly on ways to rearrange tasks and budgets of the Partners concerned. Such rearrangement shall take into consideration the legitimate commitments taken prior to the decisions, which cannot be cancelled.

The PSC is the core steering and decision-making body of the SATO project, reporting to and being accountable to the General Assembly. It is chaired by the PC (unless decided otherwise by a majority of 2/3) and composed by one representative from each beneficiary that leads at least one WP. Each representative, member of the PSC, has one voting right as stated in the CA.

Minutes of PSC meetings, once accepted, shall be sent by the PC to the General Assembly Members to inform them.

2.1.2.2. Work Package Leader

The Work Package Leader (WPL) will be responsible for managing the tasks grouped in the Work Packages (WP) as well as overseeing and monitoring the work under their coordination, in particular by defining and implementing an internal management and communication structure (providing the necessary input for the Project Management Plan). To do so, each organization involved in SATO will appoint a WP Manager.

Each WPL shall be responsible and manage the work within the respective WP, in what concerns:

1. The timely delivery of reports and results to General Assembly and the MST;
2. Alerting the MST and the PC in case of delay in the performance of the WP or in case of breach of responsibilities of any Partner under the respective WP;
3. Analyzing and documenting, at the request of the MST, a presumed breach of responsibilities of a Partner and preparing a proposal of remedies to present to the MST and General Assembly;
4. Advising the MST of any exchange of tasks and related budgets between Partners in a WP;
5. Communicating any plans, deliverables, documents, and information related with the WP among its members and to the MST;
6. Coordinating, on a daily basis, the progress of the technical work under the respective WP;
7. Assuring the compliance with the Deliverables Review Process approved by General Assembly;
8. Following up decisions made by the Consortium bodies whenever they affect the respective WP.

As mentioned above, all the WPL – namely, EDP, CNET, FC.ID, AAU, CUPE, CORE and POLIMI – are members in the PSC and report to it, to ensure the timely fulfilment of duties from the scientific and technical points of view. Also, the WPL will always inform the PSC when modifications to the WP content or budget need to be made (including budget allocations, content and quality of deliverables provided and subcontracting).

Furthermore, the WPL assure the coordination between the different project teams that collaborate with the aim of exchanging intermediate results. They will ensure the timely execution of tasks included in each WP, stimulating the interaction between the various Partners involved and are responsible for the consolidation of the reports and execution of the tasks within each WP.

2.1.2.3. Task Leaders

The TL are responsible for the technical follow up of their specific task and the detailed coordination with the other dependent tasks within the WP and the SATO project.

They will assure the timely and proper execution of their tasks and report to the WPL in case any deviation occurs, or any risk arises. Also, TL are responsible for leading the preparation of the deliverables corresponding to their tasks and for coordinating the contributions from other Partners to their task as well as for the preparation and delivery of internal task progress reports to the WPL.

2.1.3. Advisory cross-cut layer

2.1.3.1. Advisory Board

The SATO Advisory Board (SAB) will be appointed and steered by the General Assembly and it shall assist and facilitate the decisions made by the later.

SAB is a key element of the project. It will be assembled during the project's first months and composed of representatives from all sectors of the involved Consortium Partners and stakeholders from the organizations which signed the letters of support.

This body will give qualitative advice to the PSC regarding requirements, project objectives, impacts, standardization, exploitation and dissemination of the design tools.

SAB members will contribute by participating in formal meetings (usually connected to General Assembly meetings) and conference calls and by giving written feedback. They will be in an influential position to guide the direction of the project and ensure that the platform and services developed are appropriate for the needs of the industry and centrally for the user. Additionally, they will have an advisory role but will also serve as a relevant body involved in the dissemination and exploitation of results, enabling scalability and replicability of the developed solutions.

The PC will ensure that a non-disclosure agreement is executed between all Partners and each SAB member. Its terms shall not be less stringent than those stipulated in the CA, and it shall be concluded no later than sixty calendar days after their nomination or before any confidential information is exchanged, whichever date is earlier. Furthermore, the PC shall write the minutes of SAB meetings and prepare the implementation of the suggestions.

The members of SAB shall be allowed to participate in General Assembly meetings upon invitation but have no voting rights.

2.2. Decision-making rules

The overall management of the SATO project will be performed by an open teamwork organizational model.

2.2.1. Decisions

2.2.1.1. Decisions for important matters

Decision-making for important matters within the scope of the GA signed with the EC and the CA signed among all Partners, especially when such decisions may affect the agreements reached in these two contracts, will be tackled by the General Assembly.

2.2.1.2. Meeting decisions

Meeting decisions will normally be taken by seeking consensus.

2.2.1.3. Administrative decisions

Decision-making in the administrative domain is the responsibility of the PC with the support of the PSC. Individual financial issues are primarily the responsibility of the Partner itself.

2.2.1.4. Decisions by elections

Elections will be conducted at face-to-face meetings or through an online system when there are time-critical restrictions. In terms of online submission, the topics on which to decide have to be published at least two weeks in advance.

Decision-making by elections are valid if at least 2/3 of the involved Partners submit a vote. If less than 2/3 of the involved Partners submit a vote, the election can be postponed once by two additional weeks.

2.2.1.5. Technical decisions

In general, all major technical issues and the related decisions are announced to all Partners, even if the issue is not directly connected to the participation of each of them. Decision-making on technical aspects affecting a specific WP or task will preferably be solved by the participants in that WP or task.

In case of disagreement or when the decision affects more than one WP, first, the Partner or Partners involved will make an effort to immediately deal with the contingency. In case this is not achieved, the following steps – in their respective order – will be followed:

1. Involvement of the WPL (if applicable) to resolve the issue;
2. Involvement of the PC;
3. Notification to General Assembly.

If resolution is not achieved after all these steps are taken, the issue will be brought to the attention of the EC.

Unresolved disputes arising after following the above procedure shall be settled in a final manner.

In accordance with the CA provisions for decision making, the Quality Assurance Plan will set the procedures, flows and rules for decision-making, as well as for risk management, internal reporting and monitoring and reporting to the EC.

2.2.2. Conflict resolution procedure

For the resolution of conflicting positions, the approval of a 2/3 majority of Partners may be applied to avoid deadlocks in SATO's operational progress. Either the PSC or the PC can initiate the conflict resolution procedure.

3. Innovation Management Process

Innovation management allows organizations to realize opportunities and use these to create and introduce new ideas, processes, or products industriously.

By following an effective innovation management process, SATO will ensure that the developments and results of this project are released in a coordinated manner and business models are designed for the changing market and needs, ensuring customer satisfaction.

To accomplish these objectives, the SATO structure and work plan have been carefully designed to implement all the relevant phases of the innovation process from the stakeholder and market needs to the creation of SATO assessments concept, demonstration and testing the introduction to the building energy market, as represented in Figure 4.

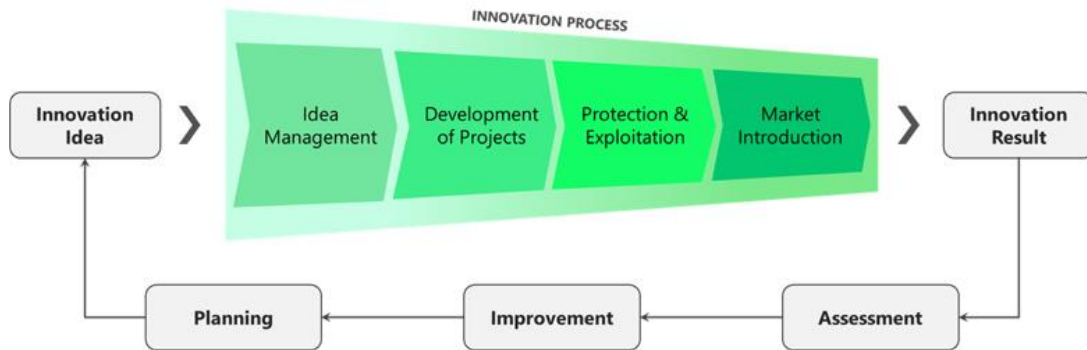


Figure 4: Innovation process

The innovation management system implemented follows the first EU Standard for Innovation Management CEN/TS 16555-1 in which a systematic innovation management process is defined.

In WP9, the Innovation Management procedures and results will be reviewed and updated in the fifteenth month and at the end of the project.

In conclusion, SATO innovation management will establish a streamlined innovation process to manage the innovation within the project with the goal of maximizing the project capability of producing successful future products, services, and processes through the combination of a technical and market-wide perspective and creativity.

4. Stakeholder Management and Engagement

The Stakeholder Management Plan will serve as a strategic framework and a Consortium-wide approach to engage and sustain support for the SATO project from both internal and external stakeholders during its entire life cycle. This will facilitate bringing stakeholders into the project and will be complemented by the communication plan incorporating a broad spectrum of communication techniques targeted at diverse stakeholder groups.

As SATO objective includes the upgrade of existing buildings through innovation for legacy equipment, the proposed solutions and demonstration pilots will interact with the personal/intimate space of the occupants of the building and, if not appropriately managed, may cause major disruptions and discontentment. Hence, from the very first hour, stakeholder engagement and management will be a priority of SATO.

SATO's stakeholder management incorporates four steps, as shown in Figure 5:

1. Stakeholder identification: to characterize each stakeholder and gather thorough information such as identity, contact, personal data, classification (client, supplier, partner or legal authority), associated risks and mitigation measures;
2. Stakeholder assessment: to assess and understand the stakes and classify the roles of the stakeholders such as classification of their capacity to influence (positively or negatively) the project, exposition of the stakeholders to the project, motivation, interests and expectations;
3. Stakeholder development: to describe the strategies and actions that will be used to manage the stakeholders according to their power and interest in the project;
4. Action plan creation: to ensure execution and discipline in stakeholder management according to the project's progress. This step includes behavior prediction, stakeholder monitoring and the

implementation of mitigation measures and responses to address each stakeholder's expected behavior.



Figure 5: Stakeholder management steps

The stakeholders considered in the project can be classified in three types: external, internal, expanded. The Stakeholder Management Plan will document the approach and describe the strategies and actions that will be used to manage the stakeholders according to their power and interest in the project – in accordance with the power-interest matrix represented in Figure 6.

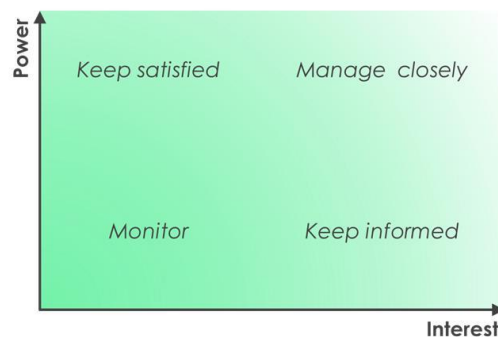


Figure 6: Power-interest matrix

The plan needs to address each stakeholder's expected behavior. Once known, the behaviors and attitudes of various stakeholders towards the project will be analyzed and appropriate mitigation measures will be designed and implemented.

To execute the Stakeholder Management Plan, SATO's Communication Plan will ensure the continuous communication with the identified stakeholders, since keeping the various stakeholders informed as the project progresses is critical to the project's success and sound stakeholder management.

5. Procedures

5.1. Reporting

The PC must submit to the Agency the technical report and financial report set out in Article 20 of the GA. These reports include requests for payment and must be drawn up using the forms and templates provided in the electronic exchange system.

Reports are developed through a reporting template that can be found here: <https://repository.sato-cloud.eu/index.php/apps/files/?dir=/SATO-project/00-Project-Info/Templates&fileid=1311>.

5.1.1. Reporting periods

As shown in Table 3, there are two reporting periods (RP).

Table 3: Reporting periods

Reporting period	Months of the project (M)
RP1	M1-M18, 1 st October 2020 – 31 st March 2022
RP2	M19-M36, 1 st April 2022 – 30 th September 2023

5.1.2. Periodic reports

The PC must submit a periodic report (PR) within sixty days following the end of each reporting period (see Table 4) and it must include a periodic technical report and a periodic financial report.

Table 4: Periodic reports date

Periodic report	Reporting period	Submission date
PR1	M1-M18, 1 st October 2020 – 31 st March 2022	M20, 31 st May 2022
PR2	M19-M36, 1 st April 2022 – 30 th September 2023	M38, 30 th November 2023

5.1.2.1. Periodic technical report

The periodic technical report should contain:

1. An explanation of the work carried out by the beneficiaries;
2. An overview of the progress towards the objectives of the action, including milestones and deliverables. This report must:
 - a. Justify the differences between the work expected to be carried out in accordance with Annex 1 of the GA and that actually carried out;
 - b. Detail the exploitation and dissemination of the results and, if required in Annex 1 of the GA, an updated plan for the exploitation and dissemination of the results;
 - c. Indicate the communication activities.
3. A summary for publication by the Agency;
4. The answers to the questionnaire, covering issues related to the action implementation and the economic and societal impact, notably in the context of the Horizon 2020 key performance indicators and the Horizon 2020 monitoring requirements.

5.1.2.2. Periodic financial report

The periodic financial report should contain:

1. An individual financial statement (in accordance to Annex 4 of the GA) from each beneficiary and from each linked third party, for the reporting period concerned, that must detail the eligible costs for each budget category. All beneficiaries and linked third parties must be aware that:
 - a. All eligible costs (even if for actual costs, unit costs and flat-rate costs) that exceed the amounts indicated in the estimated budget (in accordance to Annex 2 of the GA) must be declared. The amounts which are not declared will not be taken into account by the Agency;
 - b. If an individual financial statement is not submitted for a reporting period, it may be included in the periodic financial report for the next reporting period;
 - c. The individual financial statements of the last reporting period must detail the receipts of the action (as set out in Article 5.3.3 of the GA);

- d. They are obliged to certify the following:
 - i. The information provided is full, reliable and true;
 - ii. The costs declared are eligible (as set out in Article 6 of the GA);
 - iii. The costs can be substantiated by adequate records and supporting documentation that will be produced upon request or in the context of checks, reviews, audits and investigations;
 - iv. For the last reporting period, all the receipts have been declared.
2. An explanation of the use of resources and the information on subcontracting and in-kind contributions provided by third parties from each beneficiary and from each linked third party, for the reporting period concerned;
3. A periodic summary financial statement, created automatically by the electronic exchange system, consolidating the individual financial statements for the reporting period concerned and including (except for the last reporting period) the request for interim payment.

5.1.3. Final report

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

The final report must include:

1. A final technical report with a summary for publication containing:
 - a. An overview of the results and their exploitation and dissemination;
 - b. The conclusions on the action;
 - c. The socio-economic impact of the action.
2. A final financial report containing:
 - a. A final summary financial statement, created automatically by the electronic exchange system, consolidating the individual financial statements for all reporting periods and including the request for payment of the balance;
 - b. A certificate on the financial statements (drawn up in accordance with Annex 5 of the GA) for each beneficiary and for each linked third party, if it requests a total contribution of €325,000 or more, as reimbursement of actual costs and unit costs calculated on the basis of its usual cost accounting practices.

5.1.4. General aspects

5.1.4.1. Language

All technical reports and financial reports (including financial statements) must be submitted in the language of the GA. In other words, all reports must be written and submitted in English language.

5.1.4.2. Currency, financial statements, and conversion into euros

Financial statements must be drafted in euro. Beneficiaries and linked third parties with accounting established in a currency other than the euro must convert the costs recorded in their accounts into euro, at the average of the daily exchange rates published in the C series of the Official Journal of the European Union, calculated over the corresponding reporting period.

In case no daily euro exchange rate is published in the Official Journal of the European Union for the currency in question, they must be converted at the average of the monthly accounting rates published on the Commission's website, calculated over the corresponding reporting period.

Beneficiaries and linked third parties with accounting established in euro must convert costs incurred in another currency into euro according to their usual accounting practices.

5.1.5. Consequences of non-compliance

If the reports submitted do not comply with Article 20 of the GA, the Agency may suspend the payment deadline and apply any of the other measures described in Chapter 6 of the GA.

If the PC breaches its obligation to submit the reports and if it fails to comply with this obligation within thirty days following a written reminder, the Agency may terminate the GA or apply any of the other measures described in Chapter 6 of the GA.

5.2. Meetings

5.2.1. Face-to-face meetings

Meetings shall not start earlier than 09:00 and/or last longer than 18:00 for any SATO Partners time zone, unless otherwise agreed by all the participants.

The host shall organize beverages during the meeting. Lunch breaks shall be foreseen within the agenda and the lunch itself should be paid by the host. For meetings lasting several days a common dinner shall be offered to the participants, which should also be paid by the host.

At each meeting, a participant list should be circulated by the host (one for each meeting day), scanned and stored for reporting and audit purposes and the date for the next meeting of such kind should also be defined and indicated in the Meeting Minute.

If there is a need for an additional meeting, which is not foreseen within the project application, the date for the meeting shall be announced as soon as possible.

Although not ideal, if a participant cannot be physically present in a face-to-face meeting, he can ask the host to be present through an online tool.

5.2.2. Online meetings

If the meeting is online, the host shall have enough hardware and tools to carry it out without problems (e.g. camera, microphone, internet connection, etc.). Teleconferences may be recorded, and the host will be the responsible for its management.

Just like the face-to-face meetings, online meetings shall not start earlier than 09:00 and/or last longer than 18:00 independently of the time zone, unless otherwise agreed by all the participants.

5.2.3. Language

All project meetings are in English language, although meetings on national level are not affected by this rule.

5.3. Communication

5.3.1. Internal communication

5.3.1.1. Project website

To enhance the project workflow and communication, a common virtual workplace will be created and managed. Task 8.3 of the SATO project, whose leader is POLIMI, reflects the necessity to create and manage a Website dedicated to the activities and goals of the project.

The Website will act as a portal to all stakeholders providing both an open and closed platform with various levels of accessibility. It will provide public information on the SATO project, of upcoming events organized or attended by the project Partners, social media integration to actively share content with a larger audience and an internal repository of material for all the Partners to access.

The foreseen web-based communication channels, according to the dissemination plan from Task 8.1, will be active during the whole project lifetime, reporting any advances within a dedicated report (according to Deliverable 8.4) at a periodic consolidated basis while being populated and supported by the respective visual and multimedia material development from Task 8.2.

A coherent and aggressive dissemination strategy will be designed for the web and social networks, accompanied by the high outreach potential given by the social media platforms presence (such as LinkedIn, Facebook, Twitter, and YouTube), issued early in the project while maintained and evaluated periodically until its completion (Deliverable 8.4). Moreover, there will be project newsletters and web-press releases, with news and info project activities, events, and available outcomes.

5.3.1.2. Project WIKI page

To complement the website, a WIKI page has been setup to allow easy access to project organizational, operational, and management information. The WIKI page is privately available to designated project members and is stored in an FC.ID private server exclusively used for the SATO project.

The SATO WIKI is accessed through the address <https://wiki.sato-cloud.eu/>. Currently, it provides continuously updated information on project aspects, such as:

1. Governance structure, indicating the existing roles, appointed persons, and respective contacts;
2. Existing mailing lists with updated information on list members and contacts;
3. Information on the SATO project repository;
4. Information on past and upcoming meetings;
5. Information on deliverables production planning.

Figure 7 shows the deliverables planning WIKI page.

The screenshot displays the SATO project WIKI page for deliverables planning. The page features a navigation menu on the left with links to 'SATO wiki', 'Governance structure', 'Mailing lists', 'File Repository', 'Meetings', and 'Deliverables'. The main content area is titled 'Deliverables planning' and includes a 'Table of Contents' on the right. The 'Future deliverables' section is highlighted, showing two entries: 'D8.1 - Dissemination and Communication Plan, including project Identity' and 'D8.2 - Project brochure, posters, roll-up, and Infographics'. Both entries list 'Leader partner: CORE' and include a table with columns for 'Draft version ready', 'Reviews', 'Reviewed version', 'Deliverable Approval', and 'Deliverable Submission'. The 'Draft version ready' column shows dates like '10/12/2020'. The 'Reviewed version' column shows dates like '21/12/2020 (by leader)'. The 'Deliverable Approval' column shows dates like '28/12/2020 (by leader and coordinator)'. The 'Deliverable Submission' column shows dates like '31/12/2020 (by coordinator)'. The 'Reviewer 1' and 'Reviewer 2' columns show names like 'FC.ID' and 'EDP CNET'. The page also includes a search bar, a login status for 'Pedro Ferreira (pferreira)', and various utility links like 'Update Profile', 'Admin', and 'Log Out'.

Figure 7: SATO project WIKI page on deliverables planning

5.3.1.3. File repository

To facilitate private file sharing between the project partners, a privately stored file repository has been setup in an FC.ID server used exclusively for SATO. The file repository is accessible in the following ways:

1. Over the web using address <https://repository.sato-cloud.eu/>;

2. Using a desktop application that seamlessly integrates and continuously updates the shared repository into the local file system;
3. Using a mobile application that allows the integrating and updating the shared repository in the local file system of mobile devices.

5.3.1.4. Emailing

Since the number of emails sent during the project might be enormous, the Partners should take in consideration some basic rules when sending electronic mails to each other. Those rules are as follow:

1. The subject of the email should indicate references to the relevant part of the SATO project as described below:
 - SATO [Number of task or deliverable]: [Subject of email]
 - e.g.: SATO D9.1: Project Management Handbook;
2. To ensure a good and balanced level of communication, the list of recipients in Cc is relevant and should be well thought out;
3. If any relevant communication should be done in written, it must be considered which are the roles of the people who should be involved in the communication.

To facilitate email exchange within specific groups of participants, project management and work package mailing lists have been created:

1. Project management
 - a. General Assembly (sato@listas.di.ciencias.ulisboa.pt);
 - b. Project Steering Committee (sato-psc@listas.di.ciencias.ulisboa.pt);
 - c. Administrative mailing list (includes the Management Support Team staff) (sato-admin@listas.di.ciencias.ulisboa.pt).
2. Work packages
 - a. One list per WP, using the form sato-wpX@listas.di.ciencias.ulisboa.pt, e.g. for WP3: sato-wp3@listas.di.ciencias.ulisboa.pt.

5.3.1.5. Replying

The project Partners agree to reply to emails or telephone calls – if feedback, comments, or any other type of input is requested – as soon as possible, trying to reply to emails within the requested response period.

5.3.1.6. Document names

Documents should be named precisely to provide a common understanding of what is behind the title. This said, as a suggestion, document names can follow this rule:

SATO_[Number of activity]_[Document name].doc

e.g.: SATO_D9.1_Project Management Handbook.doc

Meeting documents should start with the date (YYYY.MM.DD), include document type (agenda, minute, etc), status (draft or final) and meeting (KoM, WP, SAB, General Assembly, etc.). As a suggestion:

[Date]_[Document type]_[Status]_[Meeting].doc

e.g.: 20201028_Agenda_Draft_KoM.doc

5.3.1.7. Templates for documents

The project visual identity was developed at the very beginning of the SATO project to allow the production of promotion material such as project leaflet, project poster, presentation, and press release templates, and roll up.

The use of project templates is mandatory during the project. For the following documents templates are available in the SATO file repository (<https://repository.sato-cloud.eu/index.php/apps/files/?dir=/SATO-project/00-Project-Info/Templates&fileid=1311>):

1. Presentations (.pptx);

2. Agenda (.docx);
3. Deliverables (.docx);
4. Minutes of Meeting (.docx).

5.3.1.8. Language

The official language for deliverables and communications shall be the English language.

5.3.1.9. Change on roles and change on members

If there is any role or member change in the SATO project, temporary or definitive, it should be informed from bottom-up regarding SATO's project management structure, and to the rest of the members that might be affected by the change.

The information that should be provided about this situation is:

1. Duration of the change (mentioning if it will be temporary or definitive);
2. Contact details of the new person (full name, e-mail, phone number and other information that may be considered relevant).

SATO contact list should be updated by the PC, as well as the project management structure (organigram) in case the change is deemed as definitive or is longer than six months. On the other hand, the correspondent WPL should update SATO's mailing list. Updates are continuously provided on the project WIKI page.

5.3.2. Communication with the Agency and the European Commission

5.3.2.1. Form and means of communication

Communication under the GA (information, requests, submissions, etc.) must:

1. Be made in writing;
2. Bear the number of the GA.

All communication must be made through the Participant Portal electronic exchange system and using the forms and templates provided there.

If – after the payment of the balance – the Agency finds that a formal notification was not accessed, a second formal notification will be made by registered post with proof of delivery ("formal notification on paper"). Deadlines will be calculated from the moment of the second notification.

Communications in the electronic exchange system must be made by persons authorized according to the Participant Portal Terms & Conditions. For naming the authorized persons, each beneficiary must have designated – before the signature of the GA – a "legal entity appointed representative (LEAR)". The role and tasks of the LEAR are stipulated in his/her appointment letter.

If the electronic exchange system is temporarily unavailable, instructions will be given on the Agency and Commission websites.

5.3.2.2. Date of communication

Communications are considered to have been made when they are sent by the sending party (i.e. on the date and time they are sent through the electronic exchange system).

Formal notifications through the electronic exchange system are considered to have been made when they are received by the receiving party (i.e. on the date and time of acceptance by the receiving party, as indicated by the time stamp). A formal notification that has not been accepted within ten days after sending is considered to have been accepted.

Formal notifications on paper sent by registered post with proof of delivery (only after the payment of the balance) are considered to have been made on either:

1. The delivery date registered by the postal service; or

2. The deadline for collection at the post office.

If the electronic exchange system is temporarily unavailable, the sending party cannot be considered in breach of its obligation to send a communication within a specified deadline.

5.3.2.3. Addresses for communication

The electronic exchange system must be accessed via the following URL: <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/myarea/projects>. The Agency will formally notify the coordinator and beneficiaries in advance of any changes to this URL.

Formal notifications on paper (only after the payment of the balance) addressed to the Agency must be sent to the official mailing address indicated on the Agency's website. And formal notifications on paper (only after the payment of the balance) addressed to the beneficiaries must be sent to their legal address as specified in the Participant Portal Beneficiary Register.

5.4. Amendments

5.4.1. Conditions

The GA may be amended by request of any of its Partners. But it will not be amended if the amendment entails changes which would call into question the decision awarding the grant or breach the principle of equal treatment of applicants.

5.4.2. Procedure

The Partner requesting an amendment must submit a request for amendment signed in the electronic exchange system.

The PC submits and receives requests for amendment on behalf of the beneficiaries. If a change of coordinator is requested without its agreement, the submission must be done by another beneficiary (acting on behalf of the other beneficiaries).

The request for amendment must include:

1. The reasons why the amendment is being requested;
2. The appropriate supporting documents.

In case the amendment is related to a change of coordinator without its agreement, the request for amendment must also include the opinion of the coordinator (or proof that this opinion has been requested in writing).

In any case, the Agency may request additional information.

If the party receiving the request agrees, it must sign the amendment in the electronic exchange system within forty-five days of receiving notification (or any additional information the Agency has requested). If it does not agree, it must formally notify its disagreement within the same deadline. The deadline may be extended, if necessary, for the assessment of the request. If no notification is received within the deadline, the request is considered to have been rejected.

An amendment enters into force on the day of the signature of the receiving party and takes effect on the date agreed by the parties or, in the absence of such an agreement, on the date on which the amendment enters into force.

5.5. General operational procedures for all consortium bodies

5.5.1. Representation in meetings

Any Partner that is a member of a Consortium Body (hereinafter referred to as Member):

1. Should be present or represented at any meeting;

2. May appoint a substitute or a proxy to attend and vote at any meeting;
3. Shall participate in a cooperative manner in the meetings.

5.5.2. Preparation and organization of meetings

During a meeting, the Members of a Consortium Body present or represented can unanimously agree to add a new item to the original agenda. Meetings of each Consortium Body may be held by teleconference or other telecommunication means. Decisions will only be binding once the relevant part of the Minutes has been accepted according to Section 6.2.5 of the CA.

Any decision may also be taken without a meeting if the PC circulates to all Members of the Consortium Body a written document, which is then agreed by the defined majority (according to Section 6.2.3 of the CA) of all Members of the Consortium Body. Such document shall include the deadline for responses. These decisions taken without a meeting shall be considered as accepted if, within fifteen calendar days after written notification by the chairperson of the outcome of the vote, no Member has sent an objection in writing to the chairperson. The decisions will be binding after the chairperson sends to all Members of the Consortium Body and to the Coordinator a written notification of this acceptance.

5.5.2.1. Convening meetings

The chairperson of a Consortium Body shall convene meetings of that Consortium Body, according to the minimum frequency presented in Table 5.

Table 5: Convening meetings

Body	Ordinary meeting	Extraordinary meeting
General Assembly	At least once a year	At any time upon written request of the Project Steering Committee or 1/3 of the General Assembly members
Project Steering Committee	At least every six (6) months	At any time upon written request of any Member of the Project Steering Committee

5.5.2.2. Notice of a meeting

The chairperson of a Consortium Body shall give notice in writing of a meeting to each Member of that Consortium Body as soon as possible and no later than the minimum number of days preceding the meeting as indicated in Table 6.

Table 6: Notice of a meeting

Body	Ordinary meeting	Extraordinary meeting
General Assembly	Fourteen (14) calendar days	Seven (7) calendar days
Project Steering Committee	Fourteen (14) calendar days	Seven (7) calendar days

5.5.2.3. Sending the agenda

The chairperson of a Consortium Body shall prepare and send to each Member of that Consortium Body a written (original) agenda no later than the minimum number of days preceding the meeting, as indicated in Table 7.

Table 7: Sending the agenda

Body	Ordinary meeting	Extraordinary meeting
General Assembly	Fourteen (14) calendar days	Seven (7) calendar days
Project Steering Committee	Seven (7) calendar days	Seven (7) calendar days

5.5.2.4. Adding agenda items

Any agenda item requiring a decision by the Members of a Consortium Body must be identified as such on the agenda. Furthermore, any Member of a Consortium Body may add an item to the original agenda, by written notification to all of the other Members of that Consortium Body up to the minimum number of days preceding the meeting as referred in Table 8.

Table 8: Adding items to the agenda

Body	Ordinary meeting	Extraordinary meeting
General Assembly	Ten (10) calendar days	Five (5) calendar days
Project Steering Committee	Five (5) calendar days	Five (5) calendar days

5.5.3. Voting rules and quorum

Each Consortium Body shall not deliberate and decide validly unless 2/3 of its Members are present or represented (to form a quorum). If the quorum is not reached, the chairperson of the Consortium Body shall convene another ordinary meeting within fifteen calendar days, and if in that meeting the quorum is not reached once more, the chairperson shall convene an extraordinary meeting which shall be entitled to decide even if less than the quorum of Members is present or represented.

Each Member of a Consortium Body present or represented in the meeting shall have one vote. A Party which the General Assembly has declared according to Section 4.2 of the CA to be a Defaulting Party may not vote.

Finally, decisions shall be taken by a majority of 2/3 of the votes cast.

5.5.4. Veto rights

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

The following situations can occur:

1. When the decision is foreseen on the original agenda, a Member may veto such a decision during the meeting only.
2. When a decision has been taken on a new item added to the agenda before or during the meeting, a Member may veto such decision during the meeting and within fifteen calendar days after the draft minutes of the meeting are sent. A Partner that is not a Member of a particular Consortium Body may veto a decision within the same number of calendar days after the draft minutes of the meeting are sent.
3. When a decision has been taken without a meeting, a Member may veto such decision within fifteen calendar days after written notification by the chairperson of the outcome of the vote.

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

A Partner may neither veto decisions relating to its identification to be in breach of its obligations nor to its identification as a Defaulting Party. The Defaulting Party may not veto decisions relating to its participation and termination in the Consortium or the consequences of them. Furthermore, a Partner requesting to leave the Consortium may not veto decisions relating thereto.

5.5.5. Minutes of meetings

The chairperson of a Consortium Body shall produce written minutes of each meeting which shall be the formal record of all decisions taken. This person shall send the draft minutes to all Members within fifteen (15) calendar days of the meeting and the minutes shall be considered as accepted if, within fifteen (15) calendar days from sending, no Member has sent an objection in writing to the chairperson with respect to the accuracy of the draft of the minutes.

The chairperson shall send the accepted minutes to all the Members of the Consortium Body and to the PC, who shall safeguard them and shall provide authenticated duplicates to those who request it.

For each minute the appropriate template has to be used, and the minute must contain the following information:

1. Date of the meeting;
2. Duration of meeting;
3. Location of the meeting;
4. Reason for the meeting;
5. Participants in the meeting (and, if the meeting is face-to-face, it must include the participant list with signatures);
6. Agenda of the meeting;
7. Results, outcomes and conclusions of the meeting;
8. Date decided for the next meeting;
9. Keeper of the minute.

6. Project Quality Management, Significant Risks, and Associated Contingency Plans

6.1. Project quality management

The main objective of WP9, in which FC.ID is the WPL, is to ensure the continuous monitoring and implementation of the project actions and the successful achievement of SATO's objectives.

One of its specific objectives includes the future monitoring of the progress of all technical activities and ensuring that the results are delivered on time and according to budget by the development of a project risk management and quality assurance plan.

6.2. Description of significant risks and associated contingency plans

6.2.1. Risk management objective, strategy and implementation

Since SATO will impact the very homes of users and adopters and thus directly influence their personal and private surroundings, it is crucial that adequate risk management is ensured, following the Risk Management Structure represented in Figure 8.

The focus must be on guaranteeing the integrity of people's personal environment and of the appliances therein. This needs to be addressed already in the prototype phase.



Figure 8: Risk management structure

The risk management strategy for SATO is based on an early identification of all relevant risks, assessment of their impact level, allocation of their ownership, resolution or mitigation by the respective owners, follow-up, and report.

The Project Manager is the overall responsible for the global risk management. This includes the execution of the Risk Management Plan and the implementation of its requirements.

Each WPL has ownership over the technical risks associated with their WP, except for those risks where it has been previously established that they cannot be managed on WP level due to technical and/or financial capacity limitations. In these cases, risk ownership will be assigned to the Consortium, following the decision-making process described in point 2 of this document.

Implementation of the risk management will include the following steps:

1. At the SATO project kick-off, there was a Risk Management Workshop to consolidate the risk skills, to collate and detail the information about risk identification, assessment, mitigation actions, ownership and monitoring processes. Moreover, the SATO Partners agreed on the risk management procedures and responsibilities to ensure an effective risk mitigation throughout the project;
2. Create a risk register (already created and represented bellow) to track and report risk management progress. This will be maintained throughout the project life;
3. Use risk register to establish the adequate risk management control mechanisms and communication to guarantee the adequate project development and share positive outcomes it generates;
4. Develop risk related plans like the Data Management Plan, the Stakeholder Management Plan and the System Failure Management Plan.

6.2.2. Project risk register

The project risk register will be stored in a dedicated folder of the repository. Each of the identified project risks (R) will be scored using the product of likelihood (L) and impact (I) as depicted in Table 9.

Table 9: Project risk register

Risk (R)		Likelihood (Li)		
		Low (L)	Medium (M)	High (H)
Impact (I)	High (H)	3	6	9
	Medium (M)	2	4	6
	Low (L)	1	2	3

Each color represents a different state in which the project is:

1. Green indicates that the project is on track. The risks already identified are not expected to impact the other project metrics or overall business outcomes;
2. Yellow indicates the necessity of some corrective action. At least one identified risk may impact negatively some project metric, outcome, or stakeholder. There might be necessary to implement some corrective actions;
3. Red indicates that significant corrective actions are required. One or more identified risks may impact the project. All Partners must place their best efforts to bring risks to acceptable levels by implementing the necessary actions.

Table 10 follows the project risk register and presents a description of the different risks for implementation of the SATO project, its level of risk and the proposed mitigation measures for each of them.

Table 10: Critical risks for implementation

Risk description	Risk level			WP	Proposed risk mitigation measures
	I	Li	R		
General risks					
Partners run out of budget due to internal changes, over-expenditure, etc.	M	L	2	9	Partners will review expenditures/ budgeted amounts on a six-monthly basis. This will help the identification of potential deviations. The PC will support Partners with modifications if necessary.
A Partner leaves the project.	M	L	2	9	PC will analyze two options: (i) the substitution of the Partner by another one of similar characteristics and/ or (ii) the redistribution of tasks among the Partners of the project.
Key Staff leaves the project.	M	L	2	9	WPL will analyze one of two options: (i) the substitution of the staff by another one of similar skills and/ or (ii) the redistribution of tasks among the Partners of the project, under the coordination of the PC.
Delays on deliverables and results not meeting project objectives.	M	M	4		The management handbook establishes mechanisms to react against possible delays. Moreover, regular WP and technical meetings will be held to ensure that activities are aligned, controlled and that learnt lessons are shared.
Partners not agreeing on the IPRs of the project developments and results.	L	M	2	9	The CA will establish basic rules for IPR. The Plan for the Exploitation and Dissemination of Results will further identify the generated results (foreground) and ownership.
Unbalanced workload distribution (time, Consortium Members, staff, tasks, etc.).	M	L	2	9	During the proposal phase, there will be detailed project planning, clear assignment of responsibilities and negotiation to guarantee a clear definition and acknowledgement of the work plan and activities. During the project, there will be periodic review meetings.

Not able to go beyond the state-of-the-art.	L	H	3	2, 3, 4, 5	In the proposal and at the beginning of the project, there will be detailed reviews of the state-of-the-art entailing innovative concept developments. The quality and complementary expertise of the Consortium Partners will ensure that the developed concept and extensions of the two commercially available platforms goes beyond the state-of-the-art.
Difficulty to further increase the TRL of the existing platforms.	L	H	3	2, 3, 4, 5, 7	The project platforms are based on already existing and economically viable platforms. The developments will involve developers who already participated in the earlier platform developments. Moreover, certification and compliance plans of the developments ensure to target a broader market.
Incompatible requirements between parts of the system and lack of interoperability obstructs the integration of the modules into a holistic overall concept.	M	H	6	1, 2, 3, 4, 5	The technical specification of compatibility requirements between parts of the system will be defined at the beginning of the project. Moreover, WP1 is carried out during the entire development process of WP2, WP3, WP4 and WP5 to ensure adjustments. Regular project meetings and constant communication between the WPL ensure standardized interfaces, both technically and cross-sectoral. Interoperability tests at early stages of the development process will also ensure that misguided development paths are not followed for long.
Disagreement between Consortium Partners about quality of procedures and overall objectives.	M	M	4	9	The clear definition of the governing board structure will contribute to an efficient resolution of disagreements. The PC will be responsible for it, and if required the PMB will assist to follow appropriately the procedure stated in the GA and the CA.
Cybersecurity risk and data privacy concerns.	M	H	6	2, 3, 4, 5, 6	The data related risks will be mitigated through the actions and procedures established in the Data Management Plan and the Risk Management Plan, following the guidelines stated in the General Data Protection Regulation (GDPR). The DP will involve experts during the project to ensure that the developed services are GDPR-compliant. If, inadvertently, a data leak and/or failure is detected, the activities and procedures outlined in the System Failure Management Plan will ensure the protection of equipment and sensitive data. Cybersecurity risk management procedures will be included in the Data Management Plan and Risk Management Plan, implementing the cybersecurity triad (confidentiality, integrity and availability).
Specific risks					
In an early stage irrevocably, defined specifications limit the later developments.	M	L	3	1	The specifications are based on a thorough analysis of the literature, other best practices and the Consortium's significant experience. Moreover, the continuous structure of WP1 will ensure that alternative development paths are acknowledged if the Consortium recognizes that the plans will need to be modified based on experience gained during the project.

Compatibility of the various IoT devices and API communication protocols with the common platform.	M	H	6	2, 3, 4	Definition of a multi-protocol message broker and internal platform standardized communication protocol and API and use of EEBUS technology.
Lack of consideration of the GDPR compliance prevents the deployment of the platform, services, or assessments.	M	H	6	1, 6, 9	A Data Protection Officer (DPO) will be announced at the beginning of the project, before any operational actions are carried out. The DPO will involve experts during the implementation of the project to ensure that the services are GDPR-compliant. The data related risks will be mitigated through the actions and procedures established in the Data Management Plan and Risk Management Plan following the guidelines stated in the GDPR.
Clients/ Users do not engage in the prototype and clients/ users abandon the demonstration phase before the project's end.	L	H	3	6	The Stakeholder Management Plan and Communication Plan will establish guidelines and activities to ensure the engagement of the clients/users throughout the entire project. The user-centred design framework will continuously ensure that the developments of the project and deployment of the pilots are aimed at the needs of users.
Underestimation of possible implementation costs concerning the installation of monitoring and automation equipment.	M	M	4	6	Solid characterization of the pilots scope, with a clear definition of requirements that will be respected throughout testing activities and early identification of the data that will be needed to input the models, enabling the Partners to estimate, if it is the case, which equipment should be bought. There will be a solid definition of activities and the effort of the pilots as well as a clear assignment of responsibilities among Partners at the proposal stage of the project.
Systems failure during or after the demonstration phase.	L	M	2	6	At first, the Risk Management and compliance with the procedures within will lower the likelihood and impact of potential system failures. Moreover, System Failure Management Plan will establish a solid guideline of procedures and activities to ensure the appropriate management of potential system failures including technical and emergency support throughout the entire project. This plan will further detail clear responsibilities among the Partners.
Lack of certification strategies for the developed technologies limits market penetration.	M	M	4	7	In T7.1, a detailed certification plan for each individual technology and application is developed and implemented during the project. The participation of the executing Partners in the technical WP as well as a continuous dialogue will support the certification processes.

6.2.3. System failure management

A System Failure Management Plan (SFMP) aims at the prevention of hazardous and abnormal events that could affect or perturb a system.

SATO's SFMP will ensure the continuation of the vital project processes during the demonstration phase in case of an emergency or system failure. Implementing this methodology will not stop eventual system failures but will prevent them and enable their recovery in a more effective manner.

The SFMP will detail and document all activities to be executed in case of an unforeseen emergency which will be used as a guideline and continuous document to collect all necessary information of such an event (e.g. failure name, failure type, cause, impact, likelihood, mitigation measure, etc.).

The SFMP is composed of the following four distinct stages:

1. Failure identification: stage in which the first observation of the failure is detected for further development in the next stages. This step includes the collection of all the information necessary to allow a detailed analysis of the failure situation (e.g. failure time, affected device, system, component, location, impact, etc.);
2. Failure classification: the failure will be classified by type (e.g. electrical, social, etc.). If the failure is already known, corresponding mitigation measures can be realized in an effective manner. In cases of yet unknown failures types, this step will help to extend and complement the failure database to ensure a faster recovery procedure in the future;
3. Failure mitigation: the most relevant stage because it is associated with the mitigation plan which incorporates different strategies that will prevent any major hazard to the system and ensure the efficient and effective resumption of vital business functions in the event of an unscheduled interruption;
4. System recovery: encloses all operational, administrative and strategic activities to put the associated mitigation plan into practice until the system is working under normal conditions. The restored operational reliability will be tested and ensure that the appropriate mitigation plan is implemented.

The corresponding responsible entity to coordinate all activities associated with the SFMP and ensure the adherence to the outlined procedure is represented by the PC.

In case the emergency or failure is detected during the demonstration phase in one of the pilots, the corresponding pilot leader is in charge of the execution of the SFMP.

In any case, all Consortium Partners as well as clients/users will be informed about potential emergency incidents and each Partner will assure its consent to support the responsible entity to carry out all necessary activities to achieve the system recovery in the most cost effective and user-friendly manner.

7. Other Rights and Obligations

7.1. Researchers' recruitment and work conditions

The beneficiaries are obliged to take all measures to implement principles set out in the Commission Recommendation on the European Charter for Researchers and Code of Conduct for the Recruitment of Researchers, particularly regarding to:

1. Working conditions;
2. Transparent recruitment processes based on merit;
3. Career development.

Furthermore, the beneficiaries must ensure that researchers and third parties involved in the action are aware of them. If a beneficiary breaches this obligation, the Agency may apply any of the measures described in Chapter 6 of the GA.

7.2. Gender equality

The beneficiaries are obliged to take all measures to promote equal opportunities between men and women in the implementation of the action – in other words, to promote gender equality. They must aim, to the extent possible, for a gender balance at all levels of personnel assigned to the action, including at supervisory and managerial level. If a beneficiary breaches this obligation, the Agency may apply any of the measures described in Chapter 6 of the GA.

7.3. Ethics and research integrity

7.3.1. Obligation to comply with ethical and research integrity principles

The beneficiaries must carry out the action in compliance with:

1. Ethical principles (including the highest standards of research integrity);
2. Applicable international, EU and national law.

Funding will not be granted for activities carried out outside the EU if they are prohibited in all Member States or for activities which destroy human embryos.

The beneficiaries must ensure that the activities under the action have an exclusive focus on civil applications and that the activities under the action do not:

1. Aim at human cloning for reproductive purposes;
2. Intend to modify the genetic heritage of human beings which could make such changes heritable (except for research relating to cancer treatment of the gonads, which may be financed); or
3. Intend to create human embryos solely for the purpose of research or for the purpose of stem cell procurement, including by means of somatic cell nuclear transfer.

In addition, the beneficiaries must respect the fundamental principle of research integrity as set out, for instance, in the European Code of Conduct for Research Integrity. This means that beneficiaries must ensure that persons carrying out research tasks follow the good research practices and refrain from the research integrity violations described in the mentioned Code and implies compliance with the following fundamental principles:

1. Reliability in ensuring the quality of research reflected in the design, the methodology, the analysis and the use of resources;
2. Honesty in developing, undertaking, reviewing, reporting and communicating research in a transparent, fair and unbiased way;
3. Respect for colleagues, research participants, society, ecosystems, cultural heritage and the environment;
4. Accountability for the research from idea to publication, for its management and organization, for training, supervision and mentoring, and for its wider impacts.

Finally, the obligations above do not change the applicability of other obligations set out in the GA or other obligations under applicable international, EU or national law – all of them still apply.

7.3.2. Activities raising ethical issues

Activities raising ethical issues must comply with the ethics requirements set out as deliverables in Annex 1 of the GA.

Before the beginning of an activity raising an ethical issue, each beneficiary must have obtained:

1. Any ethics committee opinion required under national law needed for implementing the action tasks in question;

2. Any notification or authorization for activities raising ethical issues required under national and/or EU law needed for implementing the action tasks in question.

The documents must be kept on file and be submitted upon request by the PC to the Agency. If they are not in English, they must be submitted together with an English summary, which shows that the action tasks in question are covered and includes the conclusions of the committee or authority concerned (if available).

7.3.3. Consequences of non-compliance

If a beneficiary breaches these obligations, the grant may be reduced, and the GA or participation of the said beneficiary may be terminated. Such breaches may also lead to the implementation of any of the other measures described in Chapter 6 of the GA.

7.4. Conflict of interests

The beneficiaries are obliged to avoid a conflict of interests. Therefore, they must take all measures to prevent any situation where the impartial and objective implementation of the action is compromised for reasons involving:

1. Economic interest;
2. Political or national affinity;
3. Family or emotional ties; or
4. Any other shared interest.

They must, without delay, formally notify to the Agency about any situation constituting or likely to lead to a conflict of interests and immediately take all the necessary steps to rectify this situation.

The Agency may verify that the measures taken are appropriate and may require additional measures to be taken by a specified deadline.

If a beneficiary breaches this obligation, the grant may be reduced, and the GA or participation of the said beneficiary may be terminated. Such breach may also lead to any of the other measures described in Chapter 6 of the GA.

7.5. Confidentiality

During implementation of the action and for four years after the period of thirty-six months as of 1 October 2020, the parties have the general obligation to maintain confidentiality. In other words, they must keep confidential any data, documents, or other material (in any form) that is identified as confidential at the time it is disclosed.

If a beneficiary request, the Agency may agree to keep such information confidential for an additional period beyond the initial four years. If information has been identified as confidential only orally, it will be considered confidential only if this is confirmed in writing within fifteen days of the oral disclosure. Unless otherwise agreed between the parties, they may use confidential information only to implement the GA.

The beneficiaries may disclose confidential information to their personnel, or third parties involved in the action only if they need to know it to implement the GA and are bound by an obligation of confidentiality. This general obligation of confidentiality does not change the security obligations described in Article 37 of the GA, which still apply.

The Agency may disclose confidential information to its staff, other EU institutions and bodies. It may also disclose confidential information to third parties, if it is necessary to implement the GA or safeguard the EU's financial interests and the recipients of the information are bound by an obligation of confidentiality.

Under the conditions set out in Article 4 of the Rules for Participation (Regulation No. 1290/201325), the EC must moreover make available information on the results to other EU institutions, bodies, offices or agencies as well as Member States or associated countries.

The confidentiality obligations no longer apply if:

1. The disclosing party agrees to release the other party;
2. The information was already known by the recipient or is given to him without obligation of confidentiality by a third party that was not bound by any obligation of confidentiality;
3. The recipient proves that the information was developed without the use of confidential information;
4. The information becomes generally and publicly available, without breaching any confidentiality obligation; or
5. The disclosure of the information is required by EU or national law.

If a beneficiary breaches any of its obligations related to confidentiality, the grant may be reduced, and other measures described in Chapter 6 of the GA may also take place.

7.6. Promoting the action and giving visibility to EU funding

7.6.1. Communication activities by beneficiaries

7.6.1.1. *Obligation to promote the action and its results*

The beneficiaries must promote the action and its results, by providing targeted information to multiple audiences, including the media and the public, in a strategic and effective manner. This does not change the dissemination obligations, the confidentiality obligations or the security obligations set out in the GA, all of which still apply.

Furthermore, before engaging in a communication activity expected to have a major media impact, the beneficiaries must inform the Agency.

7.6.1.2. *Obligation and right to use the EU emblem*

Unless the Agency requests or agrees otherwise or unless it is impossible, any communication activity related to the action, including in electronic form (e.g. via social media), and any infrastructure, equipment and major results funded by the grant must:

1. Display the EU emblem; and
2. Include the following text:
 - a. For communication activities: *"This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 957128"*;
 - b. For infrastructure, equipment and major results: *"This [infrastructure][equipment][insert type of result] is part of a project that has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 957128"*.

When displayed together with another logo, the EU emblem must have appropriate prominence.

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

7.6.1.3. *Disclaimer excluding Agency and Commission responsibility*

Any communication activity related to the action must indicate that it reflects only the author's view and that the Agency, and the EC are not responsible for any use that may be made of the information it contains.

7.6.2. Communication activities by the Agency and the European Commission

The Agency and the Commission may use, for its communication and publicizing activities, information relating to the action, documents notably summaries for publication and public deliverables as well as any other material, such as pictures or audio-visual material received from any beneficiary (including in electronic form). This does not change the confidentiality obligations referred to in Article 36 of the GA and explained in this document in point 7.5, all of which still apply.

If the Agency's or the Commission's use of these materials, documents or information would risk compromising legitimate interests, the beneficiary concerned may request the Agency or the EC not to use it. The right to use a beneficiary's materials, documents and information includes:

1. Use for its own purposes (in particular, making them available to people working for the Agency, the Commission or any other EU institution, body, office or agency or body or institutions in EU Member States; and copying or reproducing them in whole or in part, in unlimited numbers);
2. Distribution to the public (in particular, publication as hard copies and in electronic or digital format, publication on the internet, as a downloadable or non-downloadable file, broadcasting by any channel, public display or presentation, communicating through press information services, or inclusion in widely accessible databases or indexes);
3. Editing or redrafting for communication and publicizing activities (including shortening, summarizing, inserting other elements (such as meta-data, legends, other graphic, visual, audio or text elements), extracting parts (e.g. audio or video files), dividing into parts, use in a compilation);
4. Translation;
5. Giving access in response to individual requests under Regulation No 1049/200127, without the right to reproduce or exploit;
6. Storage in paper, electronic or other form;
7. Archiving, in line with applicable document-management rules;
8. The right to authorize third parties to act on its behalf or sub-license the modes of use set out in points 2., 3., 4., and 6. to third parties if needed for the communication and publicizing activities of the Agency or the EC.

If the right of use is subject to rights of a third party (including personnel of the beneficiary), the beneficiary must ensure that it complies with its obligations under the GA (in particular, by obtaining the necessary approval from the third parties concerned).

Where applicable (and if provided by the beneficiaries), the Agency or the EC will insert the following information: "© – [year] – [name of the copyright owner]. All rights reserved. Licensed to the Executive Agency for Small and Medium-sized Enterprises (EASME) and the European Union (EU) under conditions."

7.6.3. Consequences of non-compliance

If a beneficiary breaches any of these obligations the grant may be reduced, and other measures described in Chapter 6 of the GA may also take place.

7.7. Processing personal data

7.7.1. Data management policy

The project involves carrying out data collection and a set of large-scale validation tests to assess the technology and effectiveness of the proposed framework in real life conditions, that is, inside real habited households, workspaces, and appliance retail stores.

The Consortium is fully aware of the privacy and data protection issues that might arise, declaring its strict compliance with all EU and national legislation and directives relevant to the country where the

data collections are taking place. That is the collection, processing and transmission of personal data will be analyzed under principles of:

1. The recently published General Data Protection Regulation (GDPR) (Regulation (EU) 2016/679);
2. The Universal Declaration of Human Rights and the Convention 108 for the Protection of Individuals with regard to Automatic Processing of Personal Data;
3. The national laws applying its provisions.

Additional regulations at national level that do not fall under the GDPR and apply to data protection or any other sensitive information will also be considered.

Data managed during SATO will be processed only under the following preconditions which need to be met:

1. When the data subject has given her/his consent;
2. When the processing is necessary for the performance of or entering into a contract;
3. When processing is necessary for compliance with a legal obligation;
4. When processing is necessary to protect the vital interests of the data subject.

To this end, personal data managed within SATO will be anonymized and stored in a form which does not permit identification of users. SATO will establish a data management framework that guarantees security of collected personal data from potential abuse, theft, or loss.

The majority of research data generated by the project will be made public and will be offered, with the exception of the personal user data.

The Data Management Plan will detail what data the project will generate, whether and how it will be exploited or made accessible for verification and re-use, and how it will be curated and preserved.

7.7.1.1. Data security

A fundamental task is to manage the data in a secure way.

Besides data anonymization, there will be data encryption and backup distribution. The goal of these measures will be to ensure that data remains consistent over the lifetime of the project and there exist alternatives to the main files in case they disappear or get corrupted. The encryption component gives an extra layer of security into the data files and information.

7.7.1.2. Knowledge management

A process of knowledge management will be implemented in SATO. This process will provide the consolidation of the knowledge spiral, enable co-operation, and will allow for the creation of new knowledge.

The process is divided in three different steps:

1. The information will be gathered and shaped;
2. It will be indexed to be correctly disseminated;
3. There will be an appropriation period, which provides for the creation of new knowledge.

Some tools will be set up to support social interactions, knowledge processing and intelligent distribution of knowledge (push and pull actions to optimize the distribution of knowledge will take place).

7.7.2. Processing of personal data

7.7.2.1. Processing of personal data by the Agency and the Commission

Any personal data under the GA will be processed by the Agency or the EC under Regulation No. 45/200128 and according to the "notifications of the processing operations" to the DPO of the Agency or the Commission (publicly accessible in the DPO register).

Such data will be processed by the data controller of the Agency or the EC for the purposes of implementing, managing, and monitoring the GA or protecting the financial interests of the EU or Euratom (including checks, reviews, audits and investigations).

The persons whose personal data are processed have the right to access and correct their own personal data. For this purpose, they must send any queries about the processing of their personal data to the data controller, via the contact point indicated in the privacy statement(s) that are published on the Agency and the EC websites. They also have the right to have recourse at any time to the European Data Protection Supervisor.

7.7.2.2. Processing of personal data by the beneficiaries

The beneficiaries must process personal data under the GA in compliance with the applicable EU and national law on data protection (including authorizations or notification requirements). Furthermore, the beneficiaries may grant their personnel access only to data that is strictly necessary for implementing, managing and monitoring the GA and they must inform the personnel whose personal data are collected and processed by the Agency or the Commission. For this purpose, they must provide them with the privacy statement(s), before transmitting their data to the Agency or the Commission.

If a beneficiary breaches this obligation, the Agency may apply any of the measures described in Chapter 6 of the GA.

7.8. Assignments of claims for payment against the Agency

The beneficiaries may not assign any of their claims for payment against the Agency to any third party, except if approved by the Agency on the basis of a reasoned, written request by the PC, on behalf of the beneficiary concerned.

If the Agency has not accepted the assignment or the terms of it are not observed, the assignment will have no effect on it.

In no circumstances will an assignment release the beneficiaries from their obligations towards the Agency.

Annex 1

Table 11 presents the legal name and the short name of each organization participating in SATO.

Table 11: Participating organizations

Legal name	Short name
FCIENCIAS.ID - ASSOCIACAO PARA A INVESTIGACAO DESENVOLVIMENTO DE CIENCIAS	FC.ID
AALBORG UNIVERSITET	AAU
POLITECNICO DI MILANO	POLIMI
CYPE SOFT SL	CYPE
CORE INNOVATION AND TECHNOLOGY OE	CORE
XTEL WIRELESS APS	XTEL
VIEIRA & LOPES LDA	VL
CNET CENTRE FOR NEW ENERGY TECHNOLOGIES SA	EDP CNET
SONAE MC - SERVICOS PARTILHADOS, SA	SONAE
FREDERIKSHAVN BOLIGFORENING	FB
AGÊNCIA MUNICIPAL DE ENERGIA DO SEIXAL ASSOCIACAO	AMES
COMUNE DI MILANO	MIL
SIEMENS SA	SIP
KNAUF INSULATION S.P.A.	KI IT
EK ENERGIEKONZEPTE AG	EKAG
SIEMENS AKTIENGESELLSCHAFT OESTERREICH	SAGOE