

Deliverable Report

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SALEMA Project Handbook

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Call	H2020-SC5-2020-2
Grant number	101003785
Project website	salemaproject.eu
Coordinator	Fundacion Eurecat

¹ PU = Public

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

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

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



Document history

V	Date	Author (Affiliation)	Actions & Approvals
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V3.0	21.07.2021	Alberto Perez (EUT)	Reviewed sections on finances etc.

Summary

This Handbook provides all project partners with a summary of the main project procedures (governance and management, project monitoring, reporting, financial management, etc.) as set out in the Grant Agreement and Consortium Agreement. It also contains documentation and communication standards to enable good communication within the consortium.

Furthermore, a quality plan has been included with the goal of ensuring an efficient execution of the project and thus contribute to the production of high-quality project results, providing the beneficiaries a document that indicates procedures and tools for monitoring the project progress.

The handbook is released as the first deliverable of the project for reference, and it will be revised as needed is structures, procedures etc. change in the course of the project

Disclaimer

This publication reflects only the author's view. The Agency and the European Commission are not responsible for any use that may be made of the information it contains.

Abbreviations

Abbreviation / Acronyms	Description
(A)MGA	(Annotated) Model Grant Agreement
CA	Consortium Agreement
CFS	Certificate of Financial Statement
EAB	External Advisory Board
EC	European Commission
EU	European Union
FP	Framework Programme
GA	Grant Agreement
PB	Project Board
PCT	Project Coordination Team
PC	Project Consortium
WP	Work Package
WPL	Work Package Leader



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1. Introduction

1.1. Purpose and aim of project handbook

The project handbook has been prepared to provide information, guidelines and tools:

- For the effective management of the partnership, the financial and activity planning, execution and reporting
- To ensure a successful completion of the project objectives with high quality results within the agreed time schedule
- To follow Responsible Research and Innovation (RRI) principles
- To set the procedures for Agile management

The handbook is intended for all members of the SALEMA project and covers the most important aspects of the project including the management and governance structures, project reporting, working practices and risk management. To enable clear, accurate and up-to-date communication it contains documentation and communication standards.

Moreover, it includes a quality management plan with a common reference for all project consortium members throughout the entire project duration to enable successful collaborative work and deliver high quality project results.

1.2. Context

This deliverable is complementary to the Grant Agreement and to the Consortium Agreement. The document does not repeat the complete provisions, rules and instructions already provided in those legally binding documents. Only fragments are included in this document where deemed useful to improve understanding of the context or purpose.

Every project team member shall thoroughly review these documents to ensure the compliance of contractual obligations.

In case of apparent or real inconsistencies between these documents, the following order of precedence will be applied:

1. Grant Agreement and its annexes
2. Consortium Agreement
3. Project Administrative toolset [present document]

1.3. SALEMA Key data

Project ref. no.	101003785
Project title	Substitution of Critical Raw Materials on Aluminium Alloys for electrical vehicles
Project acronym	SALEMA
EC reference no.	H2020-SC5-2020-2
Project duration	01.05.2021 – 30.04.2024 (36 months)
Reporting periods	RP1 M18 31.10.2022 RP2 M36 30.04.2024
Total costs	EU contribution: €8,933,723.63, Estimated Project Cost: €10,711,758.67
EC Department/Unit	HADEA/B/03
Original call	H2020-SC5-2018-2019-2020-2

Table 1: SALEMA Key data



1.4. The Consortium

#	Participant organisation full name (Short name)	Country
1 Coord	Fundació Eurecat (EUT)	ES
2	Autotech Engineering Spain SL (GESTAMP)	ES
3	Siec Badawcza Lukaszewicz – Instytut Metali Niezależnych (IMN)	PL
4	Universita Degli Studi di Padova (UNIPD)	IT
5	ASAS Aluminyum Sanayi Ve Ticaret Anonim Sirketi (ASAS)	TR
6	RAFFMETAL SPA	IT
7	COMET Traitements SA (COMET)	BE
8	Universite de Liege (ULIEGE)	BE
9	Eureopean Aluminium (EAA)	BE
10	Centro Ricerce Fiat SCPA (CRF)	IT
11	Asociación Española de Normalización (UNE)	ES
12	Eureopean Science Communication Institute (ESCI)	DE
13	Profilglass SPA (PROFIL)	IT
14	Endurance SPA (ENDUR)	IT
16	Fagor Ederlan S.COOP. (FAGOR)	ES
17	Ford-Werke GMBH (FORD)	DE

Table 2: SALEMA Consortium partners

2. SALEMA Contractual framework

Projects funded under the H2020 program typically have the following contractual documents:

- EC Grant Agreement (GA)
- Consortium Agreement (CA)

Both documents are available as PDF files in the SALEMA project SharePoint document repository, the GA must be kept by all partners and should be provided to the auditor in case of an audit to obtain the CFS.

SALEMA partners may contact the coordination and/or management team in case or doubts about either document.

2.1. Grant Agreement

As a contract between the project coordinating partner (EUT) and the European Union (EU), represented by the European Commission (EC), the GA forms the legal basis for the implementation of the project.

All other project partners electronically sign the “Accession Form A” with the coordinating partner. In addition to the files on [SharePoint](#) the PDF is also available in the EU Funding & Tender Opportunities (“Participant Portal”) under the Grant management module’s document library (My projects>SALEMA>Manage Project> Document Library):



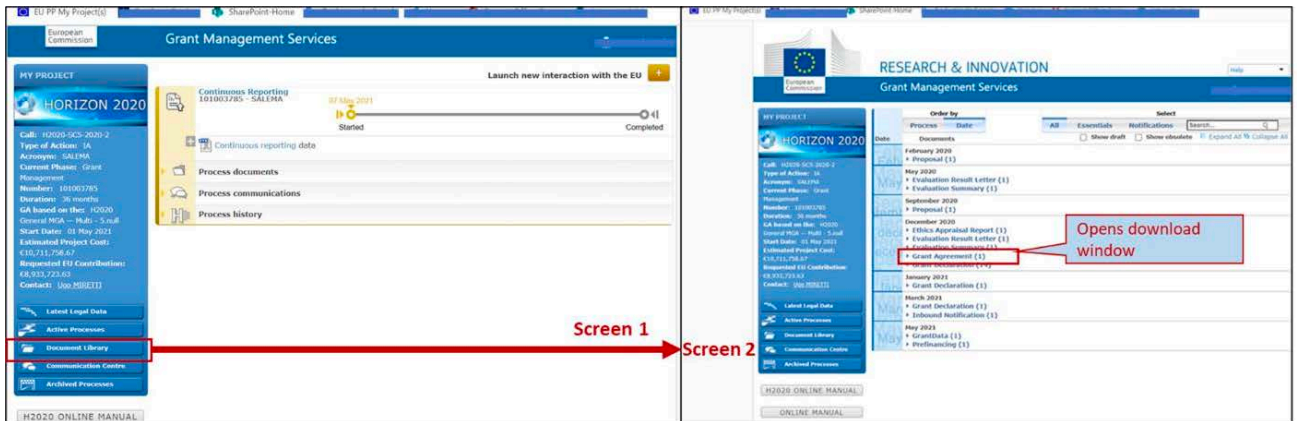


Figure 1: SALEMA project page in “Participant Portal”

The GA is a comprehensive document containing legal, regulatory and technical aspects of the project implementation, in addition it provides templates (“models”) for the CFS:

- **Terms and Conditions:** This is the core legal contract) (pp. 1-83 of the whole PDF document)
- **Annex 1 Description of the action (DoA):** Largely based on the narrative or technical part of the proposal (Part B) but with pertinent additions and changes (pp. 84-231)
- **Annex 2:** Estimated budget for the action (pp. 232-234)
- **2a** Additional information on the estimated budget (pp.234-239)
- **Annex 3 Accession Forms:** containing electronic signatures of all partners pp. (240-255)
- **Annex 4:** Model for the financial statements- template for reporting, the EC provides these in fillable format in the portal (p. 255)
- **Annex 5:** Model for the certificate on the financial statements (CFS)- templates for 3 documents that used for the audits to obtain the CFS (pp. 256-281)
- **Annex 6:** Model for the certificate on the methodology- template for partners willing to obtain the COMUC. This is a voluntary certification that only applies when a partner wishes to declare direct personnel costs as unit costs (pp. 281-295)

For detailed explanations and examples a [AGA – Annotated Model Grant Agreement](#) (version 5.2, 26 June 2019) is available.

2.2. Consortium Agreement

The CA is a contract that partners conclude amongst themselves in order to implement the project, it allows the partners to determine in detail the administrative and management provisions necessary to carry out their project. Within this agreement, partners also outline the rights and responsibilities of each member of the consortium. This agreement cannot contradict or negate the rules established by the GA or the Rules for Participation in H2020 projects.

The SALEMA CA is based on DESCA model for H2020 and adapted to suit the project characteristics. All partners have signed the CA (as of July 1st, 2021).

2.3. Amendments

During the project circumstances that lead to a request to the EU for an amendment of the Grant Agreement may arise. Any partner can request an amendment for various reasons such as

- Change of partner(s)



- Change of legal entity or status
- Changes in the Budget (EU GA: Annex 2)
- Changes in the DoA (EU GA: Annex 1)

In case an amendment is needed the PCT submits a request to the EC after a decision of the Project Board (PB- see [3. Governance](#)). After approval by the EC the PCT distributes the revised Grant Agreement to the partners, superseding former versions.

Budget changes that do not affect the content of the DoA or lead to the overspending the budget can be managed by the consortium itself; decision is taken through the General Assembly, the Project Officer is informed.

3. SALEMA Governance

SALEMA has a simple yet efficient management structure with clearly defined roles and responsibilities, a transparent decision-making process, clear reporting lines and strong progress monitoring. As a novelty in EU projects SALEMA doesn't have an External Advisory Board (EAB).

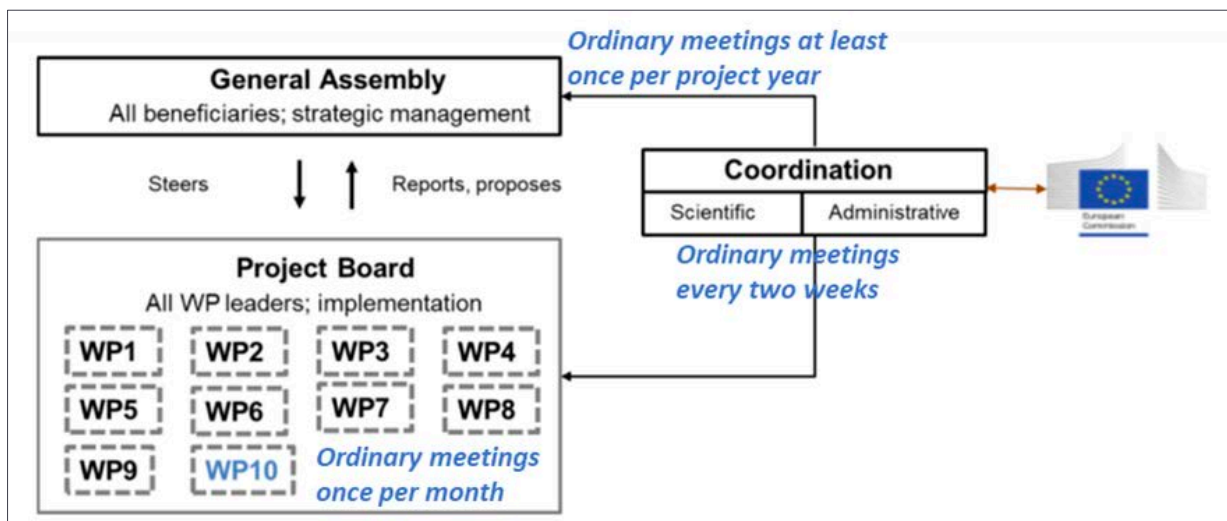


Figure 2: SALEMA Governance structure (see table in Annex 1 for partner names and roles)

- **General Assembly (Assembly):** Formed by one representative per beneficiary for strategic decision-making and overall governance. The GA is the only de-facto decision-making body of the project. It can discuss and decide issues upon its own initiative or upon request of any partner.
- **Project Board (PB):** Formed by one representative per WP, specifically appointed task managers and is chaired by the PCT. It is the executive board where the progress of the overall project is monitored and managed and decisions to be taken by the GA are prepared.
- **WP Leaders (WPL):** Formed by one person per WP it reports to the PB, its responsibility is to ensure the coherence, compliance of contractual obligation, and to implement the decisions of the GA that affect the WP.

- **Project coordinator and coordination team (PCT):** Consists of the technical coordinator, the financial & legal officer and the project coordinator. Working closely together they guarantee the smooth execution of the project as per the GA and the CA.
- **Specific task managers:** Appointed by the Assembly they will ensure appropriate coordination and communication with regards to the transversal activities: Exploitation Manager, Data Manager, Dissemination Manager.

More extensive information is found in the GA and CA under the SALEMA SharePoint folder [“Contractual Documents”](#).

3.1. Management structure and procedures

3.1.1. General Assembly

The Assembly as a unit discusses and decides on issues through its own initiative or on request of any partner. The PB and the PCT have a critical role in proposing issues to the Assembly, presenting pertinent analyses and decision options and checking viability of solutions and proposals. In the Assembly every partner has an equal vote; a valid decision requires a quorum of at least 2/3 of them present/ represented and an approval of at least another 2/3 of valid votes. Decisions of the Assembly are binding although some might still require the subsequent approval of the EC, as such Assembly members should have enough seniority to make decisions on behalf of their organisations during meetings. The CA will further detail these proceedings to ensure a clear and unambiguous operation. The most common, but not exclusive, items on the agenda of the Assembly are:

- Control project implementation, status, progress on WPs and tasks, medium and long-term planning, resource status, deliverables and milestones; any necessary decisions to ensure the achievement of the project goals, innovation and result exploitation
- Assess reported risks and opportunities of high impact and priority to decide on response/action, with a particular consideration to ensuring achievement, innovation, exploitation and IPR protection of results
- Oversee cluster activities with projects, stakeholders, thematic experts, associated partners or advisors in particular WPs or tasks throughout the project; nomination/approval of such external collaborators
- Handle consortium issues such as withdrawal, accession, changes of partners; assessment and decision in case of substantial breach of obligations by a partner, need for change of task assignment, budget, EC funding and propose GA amendments when necessary

3.1.2. Project Board

The main responsibility of the PB is to ensure that the scientific and technical activities of the project are accomplished successfully by organising the internal quality assurance through AGILE methodology. The PB will have monthly meetings (usually as phone conferences) to discuss progress within and across the WPs and the need for any corrective measures. The PB treats issues arising in more detail than can be done by the GA such as:

- Discuss and propose solutions in case of foreseeable difficulties in a WP in terms of achieving objectives or deliverables
- Optimise efforts such as harmonisation of activities between and across WPs
- Deal with obstacles and barriers causing delays, in particular if this is likely to affect other dependant WPs
- Assess the need for reallocation of tasks within or among the WPs



- And deal with weak performance or malfunctioning of a partner

The PB decides whether an issue can be tackled internally or needs to be communicated to and decided by the GA or the EC. In the latter cases, the PB will develop a proposal to be communicated to the GA for decision.

3.1.3. Work package leaders

WPL have been selected because of their technical expertise, experience and their strategic interest in the reaching the objectives of their WPs, the output or content of the WP. The WPLs ensure coherence, compliance of contractual obligation, and implement the decisions of the GA affecting the WP. Their main tasks are to:

- Supervise and assess progress against objectives
- Support team members to keep on track and handle deviations
- Give operative and technical advice
- Make well-reasoned proposals for adjustments and improvements in the work plan.
- Handle conflicts on WP level
- Report breach of obligations of any team member/party supports the PCT and PB for determining severity and remedy of breach

3.1.4. Project coordinator and coordination team

The mandate of the PCT is to represent the project and the consortium, communicate and report to the EC, monitor overall project planning and performance, administer project resources & promote project visibility.

- **Technical coordination (TC):** As TC Manel da Silva focuses on R&D performance of the project and ensures accomplishment of the technical & business objectives. Part of the technical coordination responsibilities is to resolve any R&D implementation problem, as well as to identify, monitor and mitigate risks that may arise during the project. The TC will review all reports, deliverables and results before submission to the EC to assure the highest scientific and technical quality
- **Project coordination (PC):** Hannah Arpke as PC is the main interface between the consortium and the EC. The PC ensures consistency across work and documents delivered, promotes knowledge exchange and collaboration. For coherence and accurate sharing of information, the PC chairs both the General Assembly and the Project Board.
- **Project management (PM):** Alberto Perez is the financial & legal officer who advises on and manages all matters related to the financial planning, reporting and contractual matters.

3.1.5. Specific task managers

SALEMA will appoint specific task managers to ensure appropriate coordination and cooperation with the following critical transversal activities:

- **Exploitation manager:** Leads the process of defining the exploitation routes and, where applicable, planning pre-commercial activities to be carried out after the project's funding period for each of the innovations of the project. This includes clarifying issues related to IPR affairs and potential license agreements between partners and third parties.
- **Data Manager:** Oversees monitoring any aspects related to ethical, legal and social aspects and data management, including compliance with data policies such as privacy, security and protection of personal and research data



- **Dissemination manager:** Ensures that all dissemination activities are planned to comprehensively and effectively address all stakeholders, thus boosting the project outreach capacity while ensuring there is no breach of confidentiality or secrecy that may put at risk the exploitation of results

4. Communication

4.1. Internal communication

Through the PC the coordinating partner is responsible for ensuring the management of communication within the Consortium. Communications between beneficiaries should be made in person or via e-mail, telephone and/or other suitable virtual communication systems (Teams channels).

Communications or decisions on important legal or financial issues must be sent to the Coordination team first by e-mail and, if applicable, by written confirmation by postal service or courier.

4.1.1. SALEMA Collaborative space

To reduce the volume of e-mail and ensure the availability of up-to-date electronic documentation, the project maintains a secure repository of all project documents and deliverables on a server. Rather than circulate project documents to the partners by email, the project team uploads files on the document repository and informs the partners of their availability for download.

Until further notice, the document repository will be maintained by Eurecat:

<https://eurecatcloud.sharepoint.com/:f:/r/sites/SALEMA2/Shared%20Documents/SALEMA%20All%20Partners?csf=1&web=1&e=wccb4u>

Based on the contacts list updated in May 2021 the PCT has already granted access to the SALEMA teams in each partners organisation. At any point during the project duration, partners may request to grant or revoke access for any of their project team members.

This shared repository is based on Microsoft TEAMS services, with channels (=folders) per WPs that are synchronised with the SharePoint interface where the files are stored under Eurecat's IT infrastructure. While SharePoint is found to be easier to navigate and overlook, the TEAMS channels offer a quick communication channel, including tagging options, ad-hoc calls and separate document sharing that allows partners to discuss and collaborate.

4.1.2. Mailing List

The SALEMA_collaborative space has its own contact and distribution list. During the lifetime of the project this list will be used to distribute project related information and messages. They should enable smooth communication between all members or subgroups of the project.

Should this list be regarded as insufficient at any point, the PCT may create as many mailing lists as necessary (per work package, for example).

Since the mailing list is related to the collaborative space, only subscribers to the list can receive and send messages to this list. Any message coming from non-subscribers will be bounced.



4.1.3. Meetings and record keeping

As outlined in Section 3 and [figure 1.2](#), the different governance and management bodies of SALEMA will meet regularly to ensure that communication is transparent, accurate and up-to-date. As part of the project quality management meetings are well prepared, documented and followed-up.

Entity	Participants	Frequency and approx. dates	Lead
General Assembly Meeting	Assembly members (1-2 rep./ partner)	1x/ year, every May (see below)	EUT
Project Board	All WP leads, Data, Communications, Exploitation and ELSA manager	Monthly	EUT
Coordination Team	Manel, Alberto, Hannah	Bi-weekly 30-60 minutes, as needed	EUT
Working groups	All technical except GComet, ULiege	Ad hoc/ as needed	EUT/ UNDIP

Table 3: SALEMA Governance and meetings

Apart from General Assembly Meetings in-person meetings will occur only for critical phases, when demo or on-site development is more efficient than remote work, and where personal exchange and discussion, especially among different WPs or partners is expected to provide added-value to project progress and decisions. Until the situation surrounding COVID-19 normalises online meetings via TEAMS for all groups and governing bodies are standard. Costs for travel and accommodation to participate in meetings have to be covered by each partner's own budget.

Entity/ Meeting Type	Date (Month)	Location	Host or responsible
Kick-off Meeting (KOM) (= 1 st General Assembly Meeting)	06.-07.05.2021 (M1)	Online	EUT
2 nd General Assembly Meeting	May 2022 (M12)	TBD	TBD
3 rd General Assembly Meeting	May 2023 (M24)	TBD	TBD
4 th General Assembly Meeting - Review and project closing	May 2024 (M36)	TBD	TBD

Table 4: SALEMA General Assembly Meeting schedule

Extraordinary meetings of any sort (i.e. Technical, coordination, workshop, etc.) may be organised to suit the needs of the project. These may be held in person or by virtual means.

Records of all ordinary meetings will be kept as short meeting minutes with a focus on action points. Where possible video recordings of virtual meetings will be created, however only if all participants consent to the recording, storage and sharing of the recording.

4.2. External communication

4.2.1. Outreach and Dissemination

H2020 brings about a general obligation to promote the action and disseminate results (Articles 29 and 38 of the [Grant Agreement](#)).

There is also a specific and strong requirement regarding the open access mandate for scientific publications and research data, as well as the visibility of the EC funding. In the proposal stage partners have set aside budget under other direct costs and services to fund open access publications.



SALEMA must take appropriate measures to engage with the public and the media about the project and to highlight the financial support of the Union. The measures that were already drafted in the technical Annex of the Grant Agreement (Part B, Section 2.5. Measures to maximise impact), will be further developed and detailed in D9.1, and followed in WP9.

Apart from written or graphic material, public engagement includes activities such as open days, lectures to lay public, school activities etc. also form an important part of communication activities that the EC likes to see.

The general principle is that any beneficiary can publish the foreground that they possess, provided it does not compromise or cause breach in the confidentiality agreements and provisions in the GA (Article 36) and CA (Section 10: Non-disclosure of information).

The draft text of publications and conference papers should be shared with all involved beneficiaries at least 7 days before submission. Any of those beneficiaries may raise objections within five days. The beneficiary objecting to a publication must show that its legitimate interests will suffer disproportionately great harm and shall include a request for necessary modifications.

Whenever possible, external publications should be joint publications between projects beneficiaries. References to published articles will be stored in the document repository.

A separate excel file of all publications and dissemination activities will be kept as a living document. This document is stored in SALEMA document repository. Each partner must add publications and dissemination through the WP leader responsible for dissemination and the PCT.

Before any promotional material will be published, ESCI will ask for approval of the PCT. This will minimise the risk of communicating incorrect information and will also ensure that the communication contents do not breach the level of confidentiality.

For official SALEMA press releases, the approval will be required from the PCT. Press releases from the partners will be under their responsibility and it is recommended to inform ESCI about them.

For journalistic articles and interviews only the organisations or persons mentioned in the publications will be required to approve or to fact-check the content. No official approval from the consortium is foreseen. These publications have a journalistic approach and interference by interested parties would be counterproductive for the distribution success.

No approval is needed for social media posts done by ESCI on the Twitter or LinkedIn pages.

In the case of scientific papers approval is needed from the PB and will be discussed in the PB meetings

4.2.2. Funding visibility and disclaimer

All publications and dissemination materials produced by the project need to include a proper acknowledgement of the European Commission's contribution. When displayed in association with a logo, the European Commission's emblem (not the EU flag) should be given appropriate prominence.

Any dissemination of results, in any form, including electronic, must display the EC emblem and the following text:



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No. 101003785

For all publications, the following acknowledgement phrase is compulsory:

The research leading to these results has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No. 101003785 SALEMA project.

Any publicity made by the beneficiaries in respect of the project, in whatever form and on or by whatever medium, must specify that it reflects only the author's views and that the European Union is not liable for any use that may be made of the information contained therein.

This [presentation/publication/etc] reflects only the author's views and the European Community is not liable for any use that may be made of the information contained herein.

4.3. High-resolution emblems and logos



High resolution EU emblems can be found here:

http://europa.eu/european-union/about-eu/symbols/flag_en



High-resolution SALEMA logo and partner logos are available in the SharePoint document repository under the folder: WP6. Dissemination and communication

4.4. Public Deliverables

As set out in the templates, all public deliverables include space in the cover pages for compulsory disclaimers and Creative Commons license. The author of the public deliverable is free to select the most convenient CC License, depending on the desired level of use restriction (e.g., attribution, derivate, commercial use, sharing, etc.)

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4.5. Etiquette

To keep communication and documentation clear, up-to-date and uncluttered all members are asked to follow some basic rules:

4.5.1. Contact and mailing list

The list should normally not be used to distribute documents as attachments. This will keep the mailboxes of each partner and data traffic in general as small as possible. If you must distribute documents, please proceed as mentioned in 4.1.1 and send a mail to the list or relevant partners attaching only the link to the document in the document store.

4.5.2. Collaborative space

Each partner is responsible for uploading the material intended for sharing with either some or all other partners of the consortium into the SALEMA collaborative space.

Based on the contact list members are invited to the collaborative space, the PCT requests partners to regularly check and adjust the list of members from their respective organizations. Note that keeping neat repository subscriptions avoids potential confidentiality issues and breaches.

Please upload and save files into the correct and relevant folders, if there is no suitable folder please create one and inform partners or relevant WP members by email with a link to the file. All file and folder names should be short, pertinent and contain the date of the upload. The PCT will perform regular purges of the repository, files and folders that do not appear informative, current or seem redundant or random will be deleted.

4.5.3. Templates

Our communications partner ESCI has created templates, please use these exclusively. If you have a need for a specific format/ purpose/ audience, please contact ESCI.

- Deliverable reports
- Milestone Notice of Achievement
- Interim Reports
- Meeting Minutes
- PowerPoint Presentations
- Posters for conferences and other scientific/ peer audiences
- For reports for the EC such as the periodic report and financial reports follow the structure set by the EC and available under the [EC Funding and Tender Portal](#) ("Participant Portal")

4.5.4. Dissemination and Publications

For the sake of collaborative and transparent partnership please bear in mind all tenets set out in [subsection 4.2.1](#) of this handbook.

For more on overall quality management please refer to [section 8](#).

5. Reporting

The SALEMA project work plan is detailed in the Description of the Action (DoA), Annex 1 of the [Grant Agreement](#). All Work packages, tasks, deliverables and resources to be spent during the project are defined in the DoA (See [Annex 4](#) for Gantt Chart). Progress of the project is monitored and assessed in



terms of timeliness and adherence to the budget and allocated PM for the achievement of milestones, deliverables and reports.

All overview tables are also available in the [EC Funding and Tender Portal](#) (“Participant Portal”) My projects>SALEMA>Manage Project> Continuous Reporting Data under the respective tabs.

Type of report	To WP lead for review	To technical coord. for review	To PCT	Upload into PP
DR	4 weeks before final deadline	3 weeks before deadline	1 week before deadline	On day of deadline
MS	4 weeks before final deadline	3 weeks before deadline	1 week before deadline	On day of deadline
Financial interim report	N/A	4 weeks before deadline	1 week before deadline	N/A
Periodic (Technical and Financial)	6 weeks before deadline	3 weeks before deadline	1 week before deadline	Trial upload 5 days before deadline
Dissemination/ Communication reports	4 weeks before final deadline	3 weeks before deadline	1 week before deadline	Ongoing, trial upload 3 days before deadline

Table 5: SALEMA Reporting procedure and schedule

The PCT will review and check each report according to the following criteria and upload/ submit to the EC via the Funding and Tenders Portal:

- Completeness
- Accuracy
- Relevance
- Depth
- Adherence to template
- Scientific acknowledgment

(See [section 8](#)- Quality management for details)

5.1. Milestones

Most milestones are directly linked to corresponding Deliverables (DRs) as a means of verification and merely ticked off as achieved in the portal. If there is no corresponding report we want to keep a written record of the achievement as an alternative. This is done using the template as mentioned in [subsection 4.5](#), depending on the nature of the milestone it will suffice to cross-reference the related DR if there is one.

See [Annex 2](#) for the Milestone table

5.2. Deliverables

Deliverables are usually reports, demonstrators (prototypes) or other tangible outputs such as websites, audio-visual material.

See [Annex 3](#) for the Deliverables table



5.3. Project reporting

SALEMA has two reporting periods. A technical review will be carried out in M18. The completion of the reports is a contractual obligation and a joint responsibility of all partners who are obliged to account for all technical and financial activities, results, outputs and deviations to the EC for each reporting period and at the end of the project in M36.

Reporting Period 1 (RP1) **M18** 31.10.2022 (Mid term report)

Reporting Period 2 (RP2) **M36** 30.04.2024 (Final Report)

At the end of each reporting period the EC “unlocks” the periodic reporting interface in the [EC Funding and Tender Portal](#) (“Participant Portal” under *My projects>SALEMA>Manage Project>Periodic Reporting Data*). Under that an MS WORD template for the activities report and an interactive interface for the financial reporting will become available/ activated.

All partners coordinated by the PCT have 60 days to draft, review and finalise their technical, narrative reports and the financial reports. The PCT requests that partners start drafting their respective WPs at least 4 weeks prior to the start of the 60 day period (=end of reporting period), it is therefore advised to start gathering and finalising information for the reports well within the respective reporting period.

Furthermore, the project has set 4 interim reporting periods (M1-M6, M7-12, M13-M24, M25-M36) for which financial activity will be reported. The purpose of this internal reporting is to allow for project progress monitoring and to catch budget deviations and false practices ahead of the official reporting times.

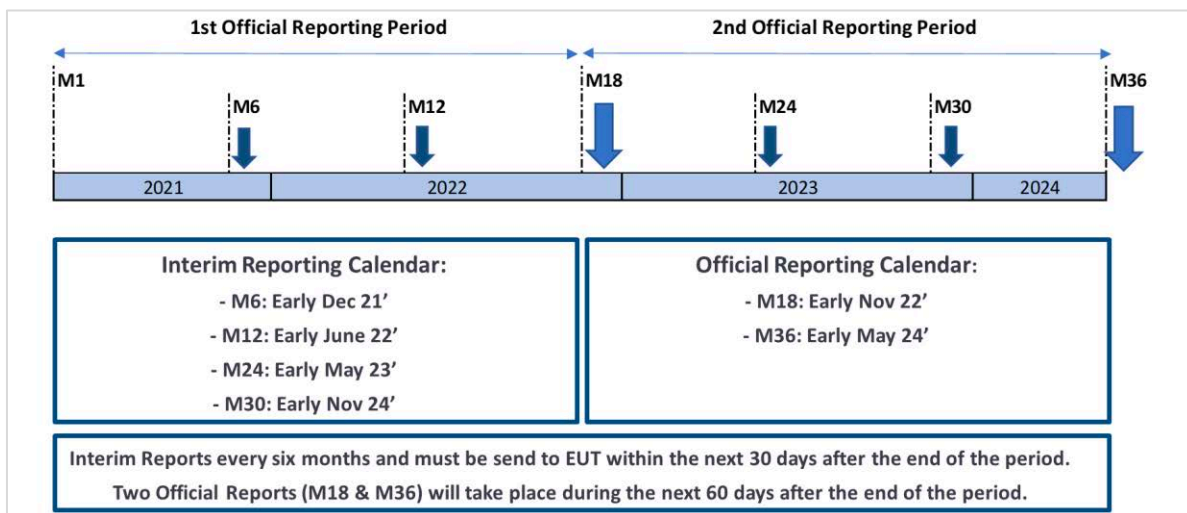


Figure 3: SALEMA Reporting calendar

5.3.1. Activity reports

The activity reports account for all technical and managerial activities carried out during the respective reporting period.

The required inputs are the following:

- Each partner must provide detailed description of all activities carried out during the period in each of the work packages/tasks in which it is involved. Reporting issues and risks detected during the project implementation (technical risks, IPR issues, etc.) is also a must. The issues and risk reporting can be done at any stage of the project implementation. To that end, the

PCT will set a Risk Log to register and follow-up project risks at any point during the project implementation. The risks reported in the Risk Log will be referenced in the Periodic report.

- The activity report will include the reporting of efforts invested in each work package. In the activity report efforts will be reported in person-months. Please note that the amount of person months declared in the activity report must be consistent with the hours (personnel costs) reported in the financial statements and the timesheets. Please see further information on how to calculate person months in section 6.1.
- WP leaders will be requested to check the partner's inputs to their respective WPs and to produce a sound and cohesive introduction detailing main achievements/progress during the period. WP leaders will be requested to be particularly attentive to any irregular or extraordinary input (either as activity described or effort reported). Any deviations from the work plan must be very well explained and, where applicable, appropriate mitigating actions must be taken to remedy the situation.
- The technical coordinator will assess the overall quality of the report and the inputs, and ensure that it provides an intelligible, comprehensive and accurate vision of the project progress towards technical and market objectives, including setbacks and risks where applicable.
- The PCT will provide an overall account of managerial activities, including financial monitoring of the project, resources spent, etc.

5.3.2. Financial statement

The financial statement for H2020 projects is a standardised form (Annex 4 of the Grant Agreement) through which beneficiaries report the costs spent during the implementation of the project and the EC contribution to which they are entitled to by applying the H2020 funding rules.

The PCT will request from all partners their Financial Statements four times during the project implementation (M1-M6, M7-12, M13-M24, M25-M30) along with the reporting periods described above.

In this template, partners will be able to report their direct costs (personnel, equipment, consumables etc.), and calculate the requested contribution for each period.

The final financial reporting, due after the end of the project, will be prepared signed electronically by each partner and submitted via the Research Participant Portal.

This section ties in directly with Sections 6.3 and 6.4 and should be viewed as complementary

5.3.3. Effort vs personnel costs

For each of the activity and financial reports, partners will be requested to provide information on the efforts invested in the project and the personnel costs this effort stands for.

Efforts

When it comes to the activity reports, the efforts spent in the project will be reported in **Person Months (PM)**. A PM is typically the average productive (i.e. excluding sickness, courses, vacations, etc) hours per month per person (full-time) for the organisation (usually ranging from 140 to 160 hours,



depending on country and type of organization). E.g. *If during a given reporting period a project team has invested (collectively) 480 hours in a given task, this would translate into 3 PMs of effort invested in an organization with an average of 160 productive hours per month.*

Personnel costs

These efforts should be translated into costs for the Financial Statement. The common base of calculation is the number of hours, which should be consistent in both reports and the time recording system implemented (i.e. Timesheets). The financial statement must include a breakdown of the PMs collectively invested by statement by person and hourly cost rate in order to calculate the actual personnel costs these efforts stand for.

*The 480 hours invested collectively by the team consists of: 80 hours of Senior Researcher 1 at an X hourly cost rate; 150 hours of a Junior researcher at a Y hourly cost rate and 250 hours of a PhD candidate at a Z hourly cost rate. **The sum of the hours invested by each of the persons will add 480 hours (3PMs) and the personnel cost will be obtained by multiplying the hours invested times the hourly cost rate.***

The template for financial statement is available at: [WP10 Project management > Management > Financial templates > Financial report](#)

5.3.4. Timesheets

All partners who have allocated staff and PM to the project are legally obliged to keep up-to-date, plausible and accurate time records. Generally a printable Excel table with the following minimum requirements is enough:

- Title and number of the action, as specified in the GA
- Beneficiary's full name, as specified in the GA
- Date and signature of the staff member
- Number of hours worked for the action in the period covered
- Supervisor's full name and signature
- Related Action tasks or work packages of Annex 1 of GA, to which the person has contributed through the reported working hours.
- If a staff member is working 100% for the project a letter certifying this will be sufficient. We will provide a template if needed. Please bear in mind that one letter is required per reporting period, and the declaration must be dated and countersigned for acceptance by the person concerned and his/her supervisor.

The template is available at: [WP10 Project management > Management > Financial templates > Financial report](#)

If time records are IT-based the following are required:

- Certified electronic signature
- Documented and secure process for managing user rights and an auditable log of all electronic transactions.



Name of the organisation		<input type="text"/>														Month		Year															
Name of the person working on the action		<input type="text"/>																															
Project number	Acronym of the action	Day																															Total
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	
		<input type="text"/>																															<input type="text"/>
Total Hours		<input type="text"/>																															<input type="text"/>
Name of the person														Name of the supervisor																			
Signed		<input type="text"/>														signed		<input type="text"/>															
date		<input type="text"/>														date		<input type="text"/>															
Signature		<input type="text"/>														Signature		<input type="text"/>															

Figure 4: Example of a timesheet

5.3.5. Audit Certificates

A Certificate of the Financial Statements (CFS), or simply said, an audit certificate, is requested to all partners that requests a total contribution of EUR 325 000 or more, as reimbursement of actual costs. It shall be submitted with the final report, within 60 days of the end of the last reporting period.

CFS will be necessary for partners that will claim over 325.000€ of EC funding. Please note that UNE and ESCI will not need to comply with this requirement.

For further information, you may visit the Reference Documents section of the Research & Innovation Participant Portal. Guidance documents related to the audit certificate are available at: http://ec.europa.eu/research/participants/docs/h2020-funding-guide/grants/grant-management/checks-audits-reviews-investigations_en.htm

5.4. EC Reviews

EC reviews will be organised by the PCT to present the project results to the EC and their independent experts. This enables the EC to monitor the project and to ensure that contractual obligations are fulfilled. Additionally, future projects plans are discussed and agreed within such a meeting.

The SALEMA project will have one technical review meeting The Project Officer may request to have the review meeting remotely or *face to face*, either in any of the partner’s venues or carried out in Brussels at the EC’s dependencies. In any case, attendance of all partners will be decided by the Project officer.

6. Financial Management

6.1. Reimbursement rates and funding scheme

Projects funded under the H2020 observe certain financial rules. Typically, the European Commission grants funding by applying a reimbursement rates model applied to the total eligible costs of the project. The eligible costs of the project build up the project budget, and it is composed of direct costs and indirect costs.



- Direct costs are all those eligible costs which can be attributed directly to the project and are identified by the beneficiaries as such, in accordance with its accounting principles and its usual internal rules. Here a non- exhaustive list of possible direct costs: personnel (both permanent and temporary), travel and subsistence, equipment, consumable, subcontracting.
- Indirect costs are all those eligible costs which cannot be identified by the beneficiaries as being directly attributed to the project, but which can be identified and justified by its accounting system as being incurred in direct relationship with the eligible direct costs attributed to the project. Indirect costs, also called overheads, are all the structural and support costs of an administrative, technical and logistical nature which are cross-cutting for the operation of the beneficiaries' body's various activities and cannot therefore be attributed in full to the project. H2020 establishes a universal 25% flat rate over total direct costs (except subcontracting) for calculating the indirect costs of the project.

The European Commission's reimbursement of costs cannot exceed the upper funding limit. The different upper funding limits depend on the type of beneficiary (see table overleaf).

Type of beneficiary	Non-profit	Profit
Research and Innovation Action (RIA)	100%	100%
Innovation actions (IA)	100%	70%
Coordination & support actions (CSA)	100%	100%

Table 6: Type of Action and EC Funding

6.2. Budget

n°	Beneficiary	Budget per partner							Total direct costs	Indirect Costs	Total	EC Contribution
		Personnel	Subcontracting	Travel	Equipment	Consumables	Other					
1	EUT	890.356,94 €	- €	34.600,00 €	- €	129.000,18 €	67.500,00 €	1.121.457,12 €	280.364,28 €	1.401.821,40 €	1.401.821,40 €	
2	GESTAMP	388.949,52 €	8.500,00 €	7.200,00 €	35.466,00 €	62.040,00 €	73.042,00 €	575.197,52 €	141.674,38 €	716.871,90 €	501.810,33 €	
L3P-1	GTH	42.048,00 €	- €	7.200,00 €	- €	62.842,00 €	12.600,00 €	124.690,00 €	31.172,50 €	155.862,50 €	109.103,75 €	
3	IMN	280.577,78 €	- €	20.000,00 €	- €	47.500,00 €	40.000,00 €	388.077,78 €	97.019,45 €	485.097,23 €	485.097,23 €	
4	UNIPD	336.000,00 €	- €	21.600,00 €	- €	- €	68.000,00 €	425.600,00 €	106.400,00 €	532.000,00 €	532.000,00 €	
5	ASAS	419.636,90 €	- €	14.400,00 €	3.700,00 €	- €	48.000,00 €	485.736,90 €	121.434,23 €	607.171,13 €	425.019,79 €	
6	RAFF	455.000,00 €	- €	14.400,00 €	165.000,00 €	96.600,00 €	21.500,00 €	752.500,00 €	188.125,00 €	940.625,00 €	658.437,50 €	
7	COMET	329.524,00 €	70.000,00 €	14.400,00 €	- €	20.000,00 €	19.000,00 €	452.924,00 €	95.731,00 €	548.655,00 €	384.058,50 €	
8	ULIEGE	487.288,00 €	- €	20.000,00 €	- €	- €	23.000,00 €	530.288,00 €	132.572,00 €	662.860,00 €	662.860,00 €	
9	EAA	292.000,00 €	- €	7.200,00 €	- €	- €	32.000,00 €	331.200,00 €	82.800,00 €	414.000,00 €	414.000,00 €	
10	CRF	453.997,22 €	- €	14.400,00 €	- €	- €	53.000,00 €	521.397,22 €	130.349,31 €	651.746,53 €	651.746,53 €	
11	UNE	67.860,00 €	- €	7.200,00 €	- €	- €	4.000,00 €	79.060,00 €	19.765,00 €	98.825,00 €	98.825,00 €	
12	ESCI	169.200,00 €	- €	20.700,00 €	- €	- €	- €	216.900,00 €	54.225,00 €	271.125,00 €	271.125,00 €	
13	PROFIL	280.000,00 €	- €	14.400,00 €	- €	190.000,00 €	13.000,00 €	497.400,00 €	124.350,00 €	621.750,00 €	435.225,00 €	
14	ENDUR	444.554,76 €	- €	14.400,00 €	17.600,00 €	331.000,00 €	13.000,00 €	820.554,76 €	205.138,69 €	1.025.693,45 €	717.985,42 €	
L3P-2	AMANN	69.000,00 €	- €	- €	- €	- €	- €	69.000,00 €	17.250,00 €	86.250,00 €	60.375,00 €	
15	FAGOR	211.229,76 €	- €	7.200,00 €	- €	- €	461.500,00 €	679.929,76 €	169.982,44 €	849.912,20 €	594.938,54 €	
L3P-3	EDERTEK	109.800,02 €	- €	7.200,00 €	16.000,00 €	- €	81.000,00 €	214.000,02 €	53.500,01 €	267.500,03 €	267.500,03 €	
16	FORD	264.793,84 €	- €	14.400,00 €	- €	- €	20.000,00 €	299.193,84 €	74.798,46 €	373.992,30 €	261.794,61 €	
	Total	5.991.817 €	78.500 €	260.900,00 €	237.766,00 €	938.982,18 €	1.077.142,00 €	8.585.106,92 €	2.126.651,75 €	10.711.758,67 €	8.933.723,63 €	
		56%	1%	2%	2%	9%	10%	80%	20%			

Table 7: SALEMA Budget



6.2.1. SALEMA Direct costs

Any deviation on the costs will have to be informed to the PCT and, depending on the amounts or reasons, explicit agreement from the PO will have to be sought.

The estimated budget breakdown of the project may be adjusted by transfers of amounts between beneficiaries or between budget categories (or both). This does not require an amendment according to Article 55, if the action is implemented as described in Annex 1 of the GA.

The beneficiaries may not however add costs relating to subcontracts not provided for in Annex 1 of the GA, unless such additional subcontracts are approved in accordance with Article 13 of the GA.

6.3. Cost eligibility

In order to be considered for reimbursement, costs incurred by the beneficiaries in the course of the project must satisfy the eligibility criteria laid down in the GA.

This section ties in directly with [Section 5.3 Project Reporting](#) and should be viewed as complementary.

In order to be eligible, costs must be:

- **Actually incurred (actual costs).** That means that they must be real and not estimated, budgeted or imputed. Where actual costs are not available at the time of establishment of the certificate on the financial statements, the closest possible estimate can be declared as actual if this is in conformity with the accounting principles of the beneficiary. This must be mentioned in the financial statement.
- **Incurred by the beneficiary.** That means that supporting documents proving the payment of the costs by the beneficiaries must be kept for all costs and for up to five years after the end of the project.
- **Incurred during the duration of the project,** except for costs incurred in relation to final reports as well as certificates on the financial statements which may be incurred during the period of up to 60 days after the end of the project (or the date of termination whichever is earlier)
- **Determined according to the usual accounting and management principles and practices** of the beneficiary identifiable and verifiable. That means that beneficiaries cannot create specific accounting principles for H2020 projects.
- **Used for the sole purpose of achieving the objectives of the project** and its expected results, in a manner consistent with the principles of economy, efficiency and effectiveness recorded in the accounts of the beneficiary

The eligible costs are either **direct** or **indirect**.

In the following sections, brief explanations of the relevant cost items in the SALEMA project are commented in an indicative way. For further information on the eligible and ineligible costs please check the SALEMA Grant Agreement (Article 6- Eligible and ineligible costs, p.15). You may also check the Annotated Model Grant Agreement, with elucidation notes for further details and clarifications.

6.4. Direct Costs

6.4.1. Personnel costs

Personnel costs are eligible if they are related to personnel working for the beneficiary under an employment contract (or equivalent appointing act) and assigned to the action. They must be limited to salaries (including during parental leave), social security contributions, taxes and other costs



included in the remuneration, if they arise from national law or the employment contract (or equivalent appointing act).

Staff of the project must:

- Be directly hired by the beneficiary in accordance with its national legislation,
- Work under the sole technical supervision and responsibility of the latter, and
- Be remunerated in accordance with the normal practices of the beneficiary.

Costs related to parental leave for persons who are directly carrying out the project are eligible costs, in proportion to the time dedicated to the project, provided that they are mandatory under national law.

Based on “actually incurred” rule, only the hours worked on the project can be charged. Working time to be charged must therefore be recorded throughout the duration of the project by any reasonable means. The complete time recording system should enable reconciliation of total hours in cases where personnel work on several projects during the same period. You may use your own institution’s timesheets provided they are giving sufficient information.

Additional remuneration

Generally, payment of bonuses that are not an employer's obligation arising from the national regulation relating to labour law or even from the employment contract and that are within its discretion may not be considered as part of normal remuneration, even though identified as a payment on the payroll, and their eligibility may be questioned (in particular with respect to the criterion of necessity for carrying out the project).

However, H2020 allows non-profit legal entities declare as personnel costs additional remuneration for personnel assigned to the action (including payments based on supplementary contracts regardless of their nature), if:

- (a) It is part of the beneficiary’s usual remuneration practices and is paid in a consistent manner whenever the same kind of work or expertise is required.
- (b) The criteria used to calculate the supplementary payments are objective and generally applied by the beneficiary, regardless of the source of funding used.

The limit of this additional payment is 8.000 € if the person works full time exclusively to the project.

Consultants

Partners can charge to the project the hours of consultants - costs for natural persons working under a direct contract- in an H2020 project, if the following cumulative criteria are fulfilled:

- (a) The person works under the beneficiary’s instructions and, unless otherwise agreed with the beneficiary, on the beneficiary’s premises;
- (b) The result of the work carried out belongs to the beneficiary, and
- (c) The costs are not significantly different from those for personnel performing similar tasks under an employment contract with the beneficiary.

Costs of personnel seconded by a third party against payment. This option is available only for ANT UK and it has been approved in the DoA. As stated in Art. 11, the Commission may approve in-kind contributions not set out in Annex 1 (DoA) without amendment (see Article 55), if:

- they are specifically justified in the periodic technical report and
- their use does not entail changes to the Agreement which would call into question the decision awarding the grant or breach the principle of equal treatment of applicants.

Costs of owners of beneficiaries that are small and medium-sized enterprises (‘SME owners’) who are working on the action and who do not receive a salary are eligible personnel costs, if they correspond to the amount per unit set out in Annex 2 multiplied by the number of actual hours worked on the action.



6.4.2. Travel and subsistence

This budget category covers travel costs and related subsistence allowances (including all related duties, taxes and charges that the beneficiary has paid, if including them is part of the usual practices for travel (e.g. non-deductible VAT; see Article 6.5)). Travel and subsistence costs may relate to the personnel of the beneficiaries as well as to external experts that participate in the action on an ad hoc basis (e.g. attending specific meetings), if the experts' participation is envisaged in Annex 1. In this case, the beneficiary may reimburse the experts or handle the travel arrangements itself (and be invoiced directly). There is no distinction between travelling in or outside of Europe.

Again, eligibility conditions are:

- Travel costs must be declared as actual costs, incurred during the project lifetime (against receipts, or usual *per diem* amount paid by the beneficiary)
- The travel must be necessary for the action (e.g., to present a paper explaining the results of a conference)
- Be in line with the beneficiary's usual practices on travel.

6.4.3. Equipment costs: depreciation costs of equipment, infrastructure or other assets

Depreciation costs of equipment are eligible if:

- Are declared as actual costs, incurred during the project lifetime, are necessary for the action and linked to it
- Have been purchased in accordance with Article 10.1.1 of the Grant Agreement
- Be written off in accordance with the beneficiary's usual accounting practices and with international accounting standards
- The depreciable amount (purchase price) of an asset must be allocated on a systematic basis over its useful life (i.e., the period during which the asset is expected to be usable)
- Depreciated equipment costs cannot exceed the equipment's purchase price
- Depreciation cannot be spread over a period longer than the equipment's useful life

Note that common office equipment (i.e. computers, laptops and software) will be problematic and may be rejected

6.4.4. Other direct costs

This budget category covers any goods and services that were purchased for the action (or contributed in-kind against payment), including:

- Costs for consumables and supplies (e.g. Raw materials, scientific publications needed for the action, etc.)
- Dissemination costs (including open access during the action) and conference fees for presenting project-related research
- Costs related to intellectual property rights (IPR) (including costs to protect the results or royalties paid for access rights needed to implement the action)
- Costs for certificates on financial statements (CFS) and certificates on methodology (unless unnecessary, for instance because the EU contribution is less than EUR 325.000) or the certificate was submitted not for the final report but before).
- Translation costs (if translation is necessary for the action's implementation, is justified, etc.)

6.4.5. Ineligible costs

Article 6.5 of the Grant Agreement list the ineligible costs of the project:



(a) Costs that do not comply with the conditions set out above (Article 6.1 to 6.4), in particular:

- Costs related to return on capital
- Debt and debt service charges
- Provisions for future losses or debts
- Interest owed
- Doubtful debts
- Currency exchange losses
- Bank costs charged by the beneficiary's bank for transfers from the Commission
- Excessive or reckless expenditure
- Deductible VAT
- Costs incurred during suspension of the implementation of the action (see Article 49)

(b) costs declared under another EU or Euratom grant (including grants awarded by a Member State and financed by the EU or Euratom budget and grants awarded by bodies other than the Commission for the purpose of implementing the EU or Euratom budget); in particular, indirect costs if the beneficiary is already receiving an operating grant financed by the EU or Euratom budget in the same period.

6.5. Indirect costs model

H2020 established a universal flat-rate of 25% of eligible direct costs, excluding:

- Costs of subcontracting
- Costs of in-kind contributions provided by third parties which are not used on the beneficiary's premises

The financial statement template will auto-calculate the amount of indirect costs for each party.

6.6. Payments by the EC and distribution

The contract specifies a maximum EC contribution to the project. According to the GA, the maximum EC contribution to be received by the SALEMA project is €8,933,723.63.

The EC issues the payments to the coordinating partner. The coordinating partner is responsible for receiving and ensuring the distribution of the community financial contribution in accordance with the provisions in the GA and the CA.

All partners have provided and verified their bank account information. Whenever changes regarding this bank account information occur on the partner's side the coordinating partner must be informed immediately and the concerned partner must fill out, stamp and sign the bank account form and send it back to the PCT. The template for the bank account form is available at: [WP10 Project management\T1.1-1.2 Management\Financial templates](#)

By a system of periodic advance payments (pre-financing) a permanent positive cash flow is guaranteed, giving great financial certainty to the consortium.

Since the SALEMA has two reporting periods, the project will have three payment processes: the pre-financing, interim payment, a second pre-financing and the final balance payment.



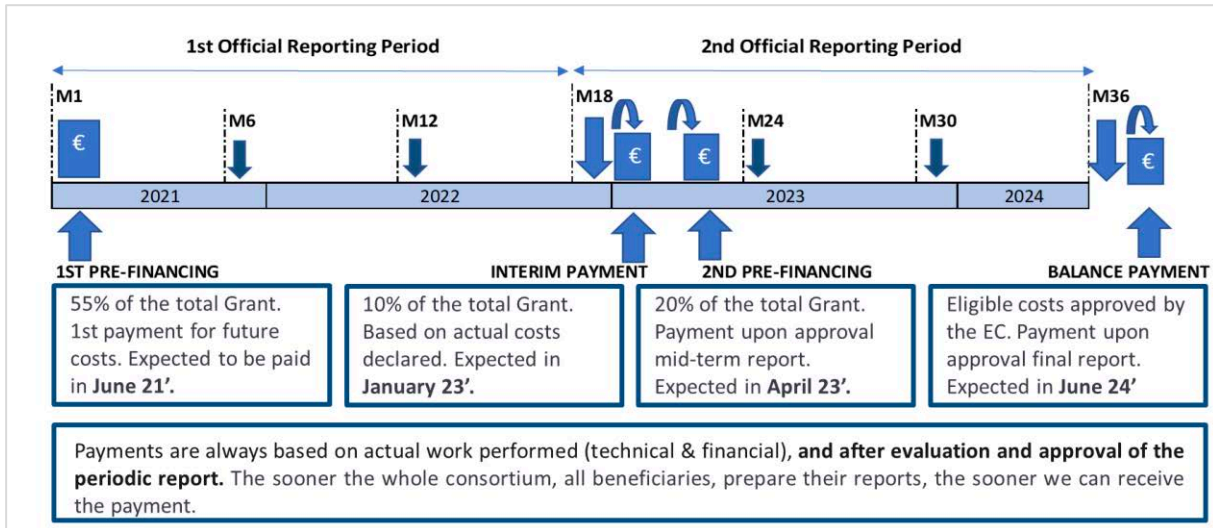


Figure 5: Payment schedule by the EC

6.6.1. First pre-financing

At the beginning of the project, the EC issues a first payment (pre-financing) to ensure the necessary cash flow for carrying out project activities.

In Article 21.2 of the GA, it is stated that the amount of the pre-financing issued to the SALEMA project is 4,913,547.99 €, 55% of the total maximum EC contribution to the project. Please see the following table for details:

nº	Beneficiary	Payments Distribution					
		Total	EC Contribution	1st Pre-financing (55%)	Interim payment (10%)	2nd Pre-financing (20%)	Balance payment (15%)*
1	EUT	1.401.821,40 €	1.401.821,40 €	771.001,77 €	140.182,14 €	280.364,28 €	210.273,21 €
2	GESTAMP	716.871,90 €	501.810,33 €	275.995,68 €	50.181,03 €	143.374,38 €	75.271,55 €
L3P-1	GTH	155.862,50 €	109.103,75 €	60.007,06 €	10.910,38 €	31.172,50 €	16.365,56 €
3	IMN	485.097,23 €	485.097,23 €	266.803,48 €	48.509,72 €	97.019,45 €	72.764,58 €
4	UNIPD	532.000,00 €	532.000,00 €	292.600,00 €	53.200,00 €	106.400,00 €	79.800,00 €
5	ASAS	607.171,13 €	425.019,79 €	233.760,89 €	42.501,98 €	121.434,23 €	63.752,97 €
6	RAFF	940.625,00 €	658.437,50 €	362.140,63 €	65.843,75 €	188.125,00 €	98.765,63 €
7	COMET	548.655,00 €	384.058,50 €	211.232,18 €	38.405,85 €	109.731,00 €	57.608,78 €
8	ULIEGE	662.860,00 €	662.860,00 €	364.573,00 €	66.286,00 €	132.572,00 €	99.429,00 €
9	EAA	414.000,00 €	414.000,00 €	227.700,00 €	41.400,00 €	82.800,00 €	62.100,00 €
10	CRF	651.746,53 €	651.746,53 €	358.460,59 €	65.174,65 €	130.349,31 €	97.761,98 €
11	UNE	98.825,00 €	98.825,00 €	54.353,75 €	9.882,50 €	19.765,00 €	14.823,75 €
12	ESCI	271.125,00 €	271.125,00 €	149.118,75 €	27.112,50 €	54.225,00 €	40.668,75 €
13	PROFIL	621.750,00 €	435.225,00 €	239.373,75 €	43.522,50 €	124.350,00 €	65.283,75 €
14	ENDUR	1.025.693,45 €	717.985,42 €	394.891,98 €	71.798,54 €	205.138,69 €	107.697,81 €
L3P-2	AMANN	86.250,00 €	60.375,00 €	33.206,25 €	6.037,50 €	17.250,00 €	9.056,25 €
15	FAGOR	849.912,20 €	594.938,54 €	327.216,20 €	59.493,85 €	169.982,44 €	89.240,78 €
L3P-3	EDERTEK	267.500,03 €	267.500,03 €	147.125,02 €	26.750,00 €	53.500,01 €	40.125,00 €
16	FORD	373.992,30 €	261.794,61 €	143.987,04 €	26.179,46 €	74.798,46 €	39.269,19 €
Total		10.711.758,67 €	8.933.723,63 €	4.913.547,99 €	893.372,36 €	2.142.351,73 €	1.340.058,54 €

* 10% of remaining grant + 5% of the Guarantee Fund

Table 8: SALEMA Prefinancing rates

Payments are expected to be received up to 90 days after the submission and approval of the periodic reports.

Partners are responsible for the forwarding of the payments to their Third parties (as for their technical execution).



Partners should consider that the pre-financing remains the property of the Union until the final payment. If, at the time of Final payment, the total amount already paid would prove to be higher than the EC contribution accepted, the EC has the right to recover the difference.

The first pre-financing for the first period is transmitted to the coordinating partner within 30 days of entry into force of the GA. The PCT is in the obligation to disburse the pre-financing among project partners that have signed the Annex 3 -Accession forms within 45 days.

6.6.2. Second pre-financing instalment

Interim payment amounts will be distributed according to the costs reported and accepted by the Funding Authority and according to the total interim payment received by the Coordinator. Interim payment received from Funding Authority will be paid in full to Parties according to the costs accepted by Funding Authority for the relevant period. The amount of the second instalment is capped to 85% of the respective Total Fund Authority Contribution of each Party (10% retention and the 5% Guarantee Fund).

The remaining pre-financing will be distributed upon submission of the Periodic Report of the 1st reporting period to the Funding Authority. The amount of the second pre-financing issued to the SALEMA project is 2142351.73 €, 20% of the total maximum EC contribution to the project.

6.6.3. Final payment

A final payment will be issued to all Parties after the successful conclusion of the Project, calculated as the difference between the amount already paid to the Party as pre-financing and interim payments and the total eligible costs of the Party as defined in the Consortium Budget. Only those eligible costs approved by the Commission, and paid to the Project Coordinator, will be reimbursed. The final payment will also include the payment of the 10% retention and the Guarantee Fund and the 5% Guarantee Fund

7. Risk management

7.1. Risk management

Taking risks in projects is inevitable since projects are enablers of change and change introduces uncertainty, hence risk. Risk management should be systematic and not based on chance. It is about the proactive identification, assessment and control of risks that might affect the delivery of the project's objectives.

Risk management is a continual activity performed throughout the life of the project. Without an ongoing and effective risk management procedure it is not possible to ensure that the project is able to meet its objectives and therefore whether it is worthwhile for it to continue. Hence effective risk management is a prerequisite of the continued business justification principle.



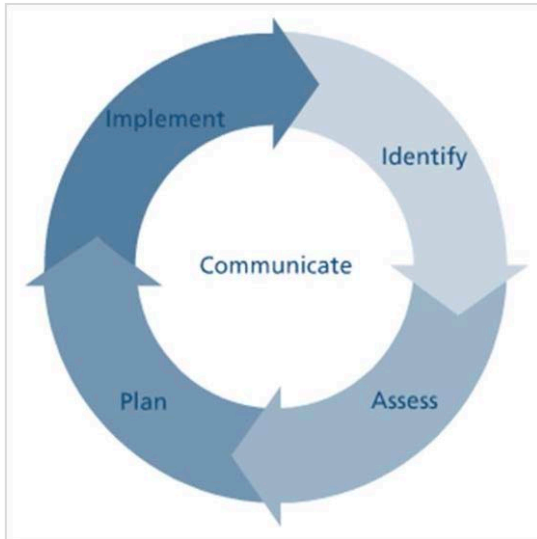


Figure 2: PRINCE2 Risk Management 5 steps

Risk management refers to the systematic application of procedures to the tasks of identifying and assessing risks, and then planning and implementing risk responses. This provides a disciplined environment for proactive decision making. Risks need to be identified, assessed and controlled.

The purpose of SALEMA Risk Management Strategy is to identify, assess and control uncertainty and, as a result, improve the ability of the project to succeed.

The **Risk Management Strategy** describes the tools, techniques and specific rules for risk management that should be applied as well as the responsibilities in terms of a risk management effective procedure development.

The **aim** is to support better decision making through a good understanding of risks – their causes, likelihood, impact, timing, and the choice of responses to them.

- Tools and techniques: SALEMA Risk Management approach is built upon Project Management standard PRINCE2. It assesses any potential negative or positive risk by its cause, likelihood, impact, timing, and the choice of response.
- Risk Register: Found in the [“Critical Risks”](#) tab in the Funding and Tender portal of the EU, once a partner has identified a new risk, he needs to report it to the PCT during the PB meetings in order to add it to a risk register.
- The risk register will be shown on each review meeting with the EC. For each entry in the Risk Register, the following fields should be recorded:
 - Risk author: The person who raised the risk.
 - Date registered: The date the risk was identified.
 - Work Package: The work package affected by the risk.
 - Risk description: In terms of the cause, event (threat or opportunity) and effect (description in words of the impact)
 - Probability and impact: The scales for estimating probability and impact in SALEMA project are: “high”, “medium” and “low”.
 - Proximity: States how close to the present time the risk event is anticipated to happen (e.g. imminent, within stage, within the project, after the project).
 - Risk response: Measures to cope with the risk. Each risk has a Contingency plan described in the column “Contingency Plan” of the Risk Register.
 - Risk Comment: It normally refers to whether a risk is active or closed.

The PCT of this consortium reserves the right to add, modify or delete risk categories if needed.

The Coordinator is responsible for keeping the Risk Register accessible to all SALEMA members through the project Repository. Partners are responsible of keeping it updated. The Risk Log is available in the SharePoint.



Responsibilities

Any kind of dispute shall be solved firstly by the involved partners. Should the conflict persist then it may reach the GA or, if extremely necessary, even the European Commission. The coordinator has a central role to prevent cases of conflict or, alternatively, to mediate.

It is a good practice to appoint one individual as responsible for monitoring each identified risk. In that sense, Work Package Leaders as supervisors of the progress of work within their WP are responsible to report any new risk detected to the coordinator and suggest actions to tackle it. The moment for risk assessment and management is any of the progress report. Even though, any identification of new risks must be communicated immediately to the coordinator.

8. Quality management

This section defines the general approach to quality assurance and the procedures to be followed for partner documentation, deliverable production and software development. The main goals of the Quality Plan procedures are:

- To produce high-quality Deliverables on time and specification, in accordance with the Work Plan
- To identify any possible risks, or deviations from the Work Plan at an early stage
- To take any necessary remedial actions as soon as possible

Following the Project Quality Plan is an important task throughout the project, as it is monitoring and reporting on the achievements of the project objectives. The technical manager of the project, with the aid of the Coordinator, will implement the quality assurance procedures. Nonetheless, quality assurance is the joint responsibility of all partners and will be applied at all levels of the project's activities. A major goal is to ensure the detection of errors and deviations as early as possible in the project's life cycle. This will enable the consortium to apply systematically corrective actions or contingency plans, if necessary.

8.1. Document production

The project provides templates with a standard visual image, to assist clear communication and comprehension, these are available in the [SharePoint](#).

The following are the main guidelines for use in partner communication, documentation, reporting, and deliverable production.

8.1.1. Reports and deliverables

Reports and Deliverables will be produced in MS WORD: working drafts and editable working copies will be supplied to partners as Word documents. After the review of a deliverable, the author will send the final version in Word format. The PCT will revise the final documents and submit the final PDF file. The final PDF version will also be made available to partners and will be regarded as the definitive version of the Report or Deliverable.

- Reports and Deliverables have a consistently styled cover sheet and structure (all fields MUST be filled in), based on the template. All pages should be numbered, and the document identification number should be included in the header. All reports and deliverables should carry the SALEMA logo and the EU emblem.
- Financial Statement (Annex 4 of the Grant Agreement) The customised financial statement template is provided by the PCT in a Microsoft Excel file, using the template of the EC.



Any other Financial Reports or numerical records produced for electronic circulation between the project partners or to the EC should be prepared using Microsoft Excel.

- **Presentations:** The PCT provides templates for project presentations in order to facilitate their production as well as to guarantee the consistency and quality of SALEMA image.

In case of doubt about the use of a template, proposal for improvements or new templates please contact the PCT.

See [Section 5](#) for specific details

8.2. Quality Assurance of work and results

8.2.1. Quality monitoring of work

To monitor and coordinate the implementation of the action, the Coordinator will arrange monthly virtual meetings with all WP leaders to discuss progress of the WPs, if there is any deviation from the scheduled plan or any problem that arises during the execution. After virtual meetings, the coordinator will prepare the report with the minutes of the meeting.

8.2.2. Quality criteria for internal review

The continuous progress assessment, close follow-up of work, corporate tools, etc. are therefore fundamental for innate quality of work. Another important base is the strict and sincere reviewing process on the project's output, in particular deliverables, regardless their classification as public/confidential/classified.

The process must follow objective criteria on scientific and technical excellence, expected objectives, coherence with prior/following work and value for exploitation. Aspects such as comprehension for non-experts shall be further taken into consideration, in particular for publishable summaries of deliverables.

- **Completeness:** Content must address all aspects related to the purpose but avoid redundancy of information.
- **Accuracy:** Content must be reliable, conclusions must match results produced and take account of any assumptions made or restrictions imposed.
- **Relevance:** Content must be focused on the key issues.
- **Depth:** Content must have adequate depth but must nevertheless be presented in a concise manner.
- **Adherence to template:** The project output must be uniform in appearance and structure (cooperate image).
- **Scientific acknowledgment:** The project output must convey with the suitable scientific citation.



A **checklist for reviewing** has been created by PCT:

Item to be checked	Yes	No	In case Not, Action to Apply (Who, what and When)
Is it in accordance with the template of the project? Structure of the deliverable (Introduction, objectives, Conclusions, Future actions, fonts, table of contents, title etc.)			
Does the document show that all the partners involved contributed actively in the describing the content of the Deliverable?			
Are the outputs of deliverable useful to the work to be done in the next project actions?			
Are the ideas and objectives of the deliverable clearly explained?			
Is the methodology clearly explained?			
Does the work and results described solve the objectives defined?			
Are KPIs defined/included?			
Is this Deliverable covering well the work of the task as described in the WP?			
Does the deliverable prove achievement of any project milestone? In yes, please refer it and mark it.			
Do you consider the deliverable should be updated in the future?			
Are all the acronyms defined and referred to acronyms table using the proper terminology?			
Is language used in the document appropriate for the target group? (including gender-inclusive language, correct English writing, comprehensive by non-experts etc.)			
As a conclusion, is the deliverable of enough quality to be submitted?			

Table 9: SALEMA Checklist for internal quality review

8.2.3. Schedule and assignment for quality control on deliverables

Every deliverable is to be revised by at least two partners not authoring the document or otherwise directly involved in its production. The reviewers will be assigned according to the following criteria:

- Partner(s) that use and rely on the content, e.g. is managing the following steps in the task or WP or uses the results to achieve their own objectives
- Partner(s) that are strategically interested in this piece of work, e.g., for exploitation
- A mutually agreed-upon internal expert because of the technical value he/she can contribute through revision

See [Section 5](#), table 5 for details



8.2.4. Deliverable amendment requests

The PCT manages any amendment requested by the EC and the potential external project reviewers. The amendment itself has to be carried out by the responsible of the deliverable and authors.

See Section 5, table 5 for details

8.2.5. Delay in deliverables

Deliverables identified in Annex I of the Grant Agreement shall be submitted as foreseen.

The coordinator immediately informs the PO of any event affecting or delaying the implementation of the project.

After reception of the reports the EC may suspend the time limit if one or more of the reports or appropriate deliverables have not been supplied or are not complete or if some clarification or additional information is needed.

The EC may proceed in part with an interim payment if some reports or deliverables are not submitted as required, or only partially or conditionally approved. The reports and deliverables due for one reporting period which are submitted late will be evaluated together with the reports and deliverables of the next reporting period.



Annex 1: SALEMA Consortium partners and members

PARTNER #	ORGANISATION	NAME	ROLE IN PROJECT	EMAIL
1	EURECAT	Hannah Arpke	Project coordinator	hannah.arpke@eurecat.org
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Annex 2: SALEMA Milestones

MS No.	Name	Related WP	Lead partner	Due date (M)	Means of verification
MS1	Kick-Off Meeting	WP10	EUT	1	Minutes
MS2	Alloy requirements defined	WP1-2	EUT	3	D1.1 and D2.1
MS3	CDMP	WP9	ESCI	3	D9.1
MS4	Project periodic meetings	WP10	EUT	Every 12M	Minutes
MS5	Large scale scrap sorting campaign running	WP7	ULIEGE	14	Delivery of scrap material
MS6	Periodic progress reports	WP10	EUT	12-24-36	PB approval for submission to EC
MS7	Alloy compositions selected	WP1-2	EUT	15	List of selected compositions
MS8	Alloy production procedure implemented	WP3	RAFF	18	Production plant adapted
MS9	Demonstrator parts design	WP4, 5, 6	EUT	24	3D CAD design of the 5 demonstrators
MS10	Market study and business modelling frameworks agreed	WP8	EUT	24	D8.6
MS11	Pilot set-up completed	WP4, 5, 6	EUT	30	Pilots up and running
MS12	Case studies trials started	WP4, 5, 6	EUT	32	Obtention of first results
MS13	Final Event	WP9	ESCI	36	Final Event Video



Annex 3: SALEMA Deliverables

DR. No	Title and Description	Related WP	Lead Partner	Type	Diss. Level	Due Date
D1.1	Alloy specifications for partially recycled alloys	WP1	EUT	R	PU	31.07.2021
D1.2	Analysis of the different scrap groups	WP1	COMET	R	PU	31.01.2022
D1.3	Results of the laboratory trials with partially recycled alloys	WP1	EUT	R	PU	31.01.2022
D1.4	Results of the micro-additions tests performed at laboratory level	WP1	EUT	R	CO	30.04.2022
D1.5	Results of the heat treatment optimization test	WP1	EUT	R	PU	31.07.2022
D2.1	Specifications required by the low CRM aluminium alloys	WP2	CRF	R	PU	31.07.2021
D2.2	Description of criteria and tools used for exploring alternative alloying systems	WP2	UNIPD	R	PU	31.01.2022
D2.3	Describing design procedure and identification of new alloys with reduced CRM content	WP2	UNIPD	R	PU	30.04.2022
D2.4	Results of laboratory trials within the compositional ranges selected for the alloys	WP2	IMN	R	CO	31.07.2022
D3.1	Definition of the pre-treatment required by the aluminium scrap	WP3	RAFF	R	PU	31.07.2022
D3.2	Production procedure for HPDC ingots with the new aluminium alloys	WP3	RAFF	DEM	CO	31.10.2022
D3.3	Production procedure for stamping sheet with the new aluminium alloys	WP3	PROFIL	DEM	CO	31.10.2022
D3.4	Production procedure for extrusion billets with the new aluminium alloys	WP3	ASAS	DEM	CO	31.10.2022
D3.5	New alloys management system	WP3	RAFF	R	CO	30.04.2023
D3.6	Research on procedures to recover CRM and valuable elements from the dross formed	WP3	EUT	R	PU	30.04.2023
D4.1	CAD of the possible front pillar design to be used for alloy validation	WP4	ENDUR	R	CO	31.10.2022
D4.2	CAD of the design for manufacturing of the component to be used for alloy validation	WP4	FAGOR	R	CO	31.10.2022



D4.3	New alloys produced for HPDC process	WP4	RAFF	DEM	PU	31.08.2022
D4.4	Results of the industrial laboratory trials with the different alloys	WP4	EUT	R	PU	30.04.2023
D4.5	Properties characterized for the different alloys used at the Trials	WP4	EUT	R	PU	30Jun2023
D4.6	New tool and process set up for processing new low CRM aluminium alloys A	WP4	ENDUR	DEM	CO	30.04.2023
D4.7	New tool and process set up for processing new low CRM aluminium alloys B	WP4	FAGOR	DEM	CO	28.02.2023
D4.8	Demonstrator components produced with the new aluminium alloys A	WP4	ENDUR	DEM	CO	31.12.2023
D4.9	Demonstrator components produced with the new aluminium alloys B	WP4	FAGOR	DEM	CO	29.02.2024
D4.10	Results of new alloy performance under full industrial production A	WP4	ENDUR	R	CO	30.04.2024
D4.11	Results of new alloy performance under full industrial production B	WP4	FAGOR	R	CO	30.04.2024
D5.1	Service requirements for the developed sheet aluminium grades	WP5	GESTA MP	R	PU	28.02.2023
D5.2	Service characterization of the developed sheet aluminium grades	WP5	EUT	R	PU	31.08.2023
D5.3	Data for the processing of the new aluminium sheet metal grades	WP5	EUT	R	PU	31.08.2023
D5.4	Pilot trial demonstrator: sheet metal cold stamping	WP5	CRF	DEM	CO	29.02.2024
D5.5	Pilot trial demonstrator: sheet metal hot stamping	WP5	GESTA MP	DEM	CO	29.02.2024
D6.1	Aluminium billet and extruded profile in laboratory scale	WP6	IMN	DEM	PU	31.10.2022
D6.2	Properties characterized for the different alloys used at the trials	WP6	IMN	R	PU	31.05.2023
D6.3	Demonstrator extruded profiles with the new aluminium alloys	WP6	ASAS	DEM	CO	31.12.2023
D6.4	New alloys performance under industrial extrusion production	WP6	ASAS	R	CO	31.12.2023
D6.5	Demonstrator of the frontal frame produced by combination of HPDC and Extrusion	WP6	ASAS	DEM	CO	30.04.2024
D7.1	Optimized LIBS module for Al alloys compositions acquisitions	WP7	ULIEGE	DEM	CO	31.12.2021
D7.2	Software for Al alloys scraps classification	WP7	ULIEGE	Other	CO	28.02.2022



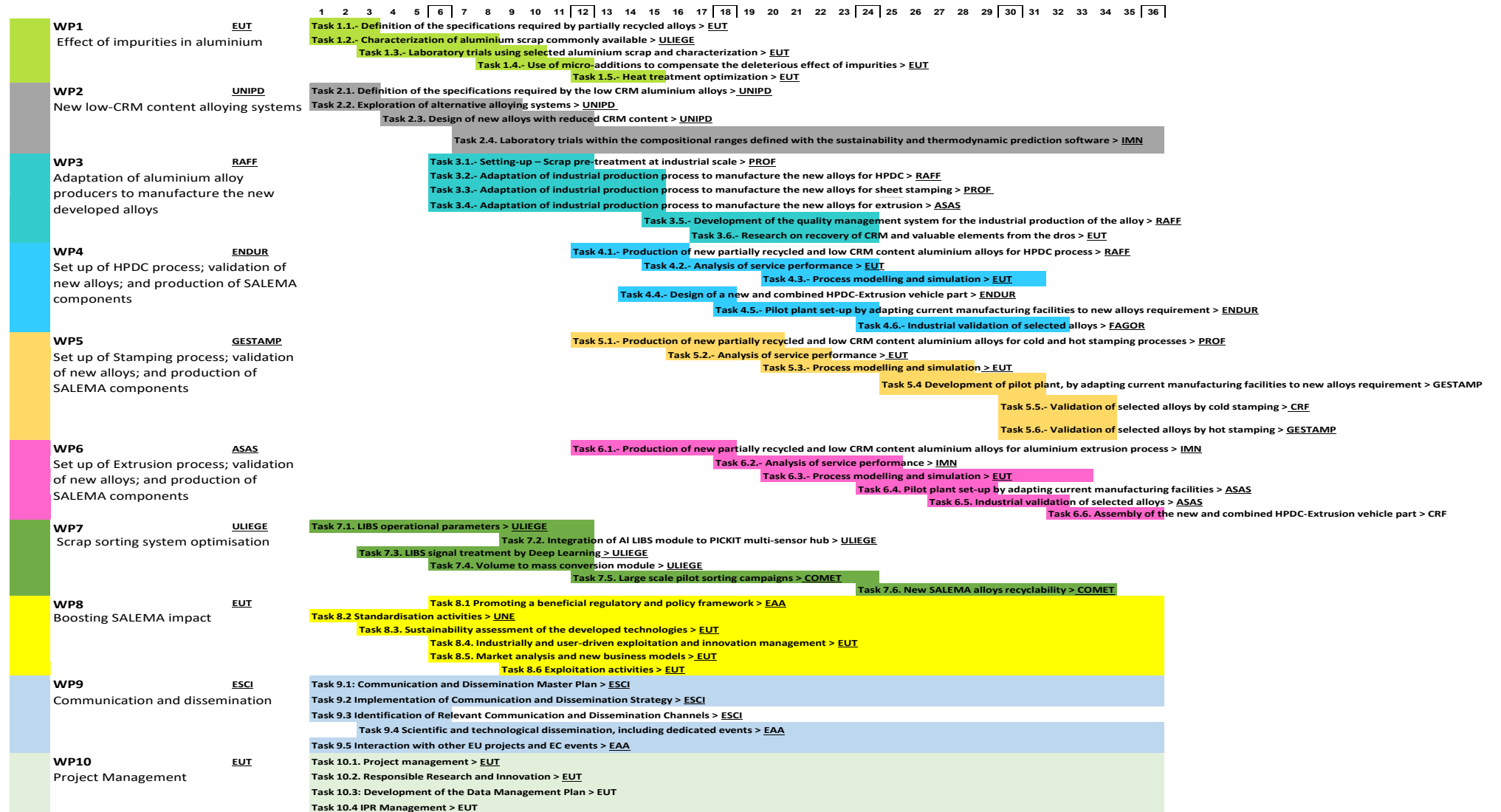
D7.3	Integration of LIBS in AI mode to the multi-sensor and sorting PICKIT prototype	WP7	ULIEGE	DEM	CO	30.04.2022
D7.4	Production of large AI scraps classes batches for WP 4-5-6	WP7	COMET	DEM	PU	31.01.2023
D7.5	SALEMA new alloy sensor-based sorting ability	WP7	COMET	R	PU	29.02.2024
D8.1	Policy recommendations	WP8	EAA	R	PU	30.04.2023
D8.2	Policy-brief	WP8	EAA	R	PU	30.04.2024
D8.3	Product Category Rule for aluminium components of passenger cars in Europe	WP8	EAA	R	PU	31.10.2022
D8.4	Standardization landscape and applicable standards	WP8	UNE	R	PU	31.10.2021
D8.5	Contribution to standardization	WP8	UNE	R	PU	30.04.2024
D8.6	SALEMA Market study and business modelling frameworks	WP8	EUT	R	CO	30.04.2024
D8.7	LCA result's report of the different alloys and production technologies studied	WP8	EUT	R	PU	30.04.2024
D8.8	LCC result's report of the LCC of the different alloys and production technologies studied	WP8	EUT	R	PU	30.04.2024
D8.9	Innovation and Technological Development Management	WP8	EUT	R	PU	30.04.2024
D8.10	First Plan of Use and Dissemination of Results	WP8	EUT	R	PU	30.11.2022
D8.11	Final PUDR and Exploitation Agreement	WP8	EUT	R	CO	30.04.2024
D9.1	Communication and Dissemination Master Plan	WP9	ESCI	R	PU	31.07.2021
D9.2	Project website and social media channels	WP9	ESCI	Websites, patents filing, etc.	PU	31.08.2021
D9.3	SALEMA brochure	WP9	ESCI	Websites, patents filing, etc.	PU	31.10.2021
D9.4	SALEMA introductory video	WP9	ESCI	Websites, patents filing, etc.	PU	31.10.2021
D9.5	SALEMA final video	WP9	ESCI	Websites, patents filing, etc.	PU	30.04.2024
D9.6	Best Practices for Communication & Dissemination Activities	WP9	ESCI	R	PU	30.04.2024
D9.7	on the scientific and technological dissemination	WP9	EAA	R	PU	30.04.2024



D9.8	on the interaction with other EU projects and EC events	WP9	EAA	R	PU	30.04.2024
D10.1	Project Handbook	WP10	EUT	R	PU	31.07.2021
D10.2	Responsible Research Management	WP10	EUT	R	PU	30.04.2024
D10.3	Data Management Plan	WP10	EUT	ORDP: Open Research Data Pilot	PU	31.10.2021
D10.4	Handbook to apply Agile methodology in non-IT research projects	WP10	EUT	R	PU	30.04.2024



Annex 4: SALEMA Gantt Chart



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