

SHIFT

MetamorphoSis of cultural Heritage
Into augmented hypermedia assets
For enhanced accessibiliTy
and inclusion



Funded by
the European Union

This project has received funding from
the European Union's Horizon Europe
research and innovation programme under
grant agreement no 101060660.

DOCUMENT INFO

DOCUMENT ID:	D7.1 - Project Handbook (V2)
VERSION DATE:	10/01/2024
TOTAL NUMBER OF PAGES:	63
ABSTRACT:	This document outlines how SHIFT intends to organize its internal procedures. The objective is to assist all potential contributors, from every partner level to Work Package Leaders (WPL) and provide a common framework aimed at minimizing administrative overhead. Roles and responsibilities (internal SHIFT), proposed tools (document sharing, templates, etc.), quality assurance and risk management, technical and financial reporting procedures and publication guidelines are all covered by this deliverable. All underlined content is inherited from the DoA document, which was used as well as the basis for the funding agreement and the specifications agreed in the consortium agreement.
KEYWORDS	Project management, risk management, quality assurance, monitoring, reporting procedures

AUTHORS

NAME	ORGANISATION	ROLE
Purcarea Razvan	SIMAVI	Project Manager
Daniela Bichir	SIMAVI	Quality Manager

REVIEWERS

NAME	ORGANISATION	ROLE
Klaudia TVERGYÁK	SOMKL	Overall Reviewer
Ioana CRIHANA	ANBPR	Review V0.1
George MARGETIS	FORTH	Review V0.2

VERSION HISTORY

VERSION	DESCRIPTION	DATE
0.1	1st complete draft	23/12/2022
0.2	Review suggestions integrated	27/12/2022
1.0	Final version to be released to the EC	30/12/2022
V0.2	Updated version	10/01/2024

EXECUTIVE SUMMARY

This D7.1 Project Handbook is the first document provided by WP7 and defines the Shift framework in terms of governance, quality and project management, risk management, monitoring, and reporting procedures.

This report starts from all the initial project description documents (the DoA - Description of Action), its development to the Grant Agreement (including the structure and roles of the project) and the Consortium Agreement (in which the SHIFT partners established the terms of collaboration).

Project Handbook contains all the activities related to management, detailing the tools needed to effectively organize the workflow.

Defining processes, guidelines, and procedures, identifying tools, quality assurance, risk assessment and reputation are topics covered in this report. All the mechanisms and tools defined are aimed at facilitating partners' contribution to tasks and reports and building a common working framework for the SHIFT project.

The report contains all information related to project management and progress, including procedures to be followed, quality assurance processes and deliverables. It also provides information regarding the partners, how they will use to communicate and make decisions, and the boards established for SHIFT to manage and advise effectively on the technical aspects of the project.

This can be considered a living document as it could be updated as the project progresses due to changes in responsibility, experiences and/or potential changes of the tools.

CONTENTS

1 INTRODUCTION.....	7
1.1 Scope and objectives	7
1.2 Structure of this deliverable	7
2 GOVERNANCE AND COMMUNICATION	8
2.1. Organization and governance	9
2.1.1. Assigned roles within SHIFT.....	9
2.1.3. Executive board	12
2.1.3.1. Innovation and IPR management	12
2.1.3.2. Ethics management	12
2.1.3.3. Work package leader.....	13
2.1.3.4. Project Coordinator.....	14



2.1.3.5. Project management team	15
2.1.3.6. Quality Management Team.....	16
2.2. Collaboration	16
2.2.1. Information flow	16
2.2.1. Repository	16
2.2.3. Project meetings.....	18
2.2.3.1. Meeting Agenda	18
2.2.3.2. Meeting Minutes.....	18
2.2.3.3. Type of meetings.....	18
2.2.3.4. Face to Face Meetings	19
2.2.4. Templates.....	20
3. PROJECT MANAGEMENT	20
3.1. Approach.....	20
3.2. Project Management Structure	20
3.3. Work breakdown structure	21
3.4. List of milestones	32
4. QUALITY MANAGEMENT	33
4.1 Objectives.....	33
4.2 Quality Management System	33
4.3. Quality indicators	34
4.3.1. Project QIs and KPIs	35
4.4. Quality assurance.....	38
4.4.1. Coding deliverables	39
4.4.2. Deliverable editing	39
4.4.3. Deliverable timeline.....	41
5. RISK MANAGEMENT	44
5.1. Identify Risks	46
5.2. Risk Monitoring and Control.....	49
6. MONITORING AND REPORTING PROCEDURES.....	50
6.1. ECAS reporting information.....	50
6.2. Reporting to the coordinator.....	51



6.3. Financial report	52
6.4. Technical report	54
6.5. Change Management	56
7. CONCLUSION	58
8. REFERENCES	59
Annex 1 – list of deliverables	60

LIST OF TABLES

Table 1. SHIFT project consortium	7
Table 2. SHIFT GA members	11
Table 3. Work Package Leader Board	13
Table 4. Matrix of duties	13
Table 5. PC timeline	15
Table 6. Type of meetings	18
Table 7. Planned face-to-face meetings	19
Table 8. WP1. Task details and leaders appointment	23
Table 9. WP2. Task details and leaders appointment	24
Table 10. WP3. Task details and leaders appointment	25
Table 11. WP4. Task details and leaders appointment	27
Table 12. WP5. Task details and leaders appointment	28
Table 13. WP6. Task details and leaders appointment	29
Table 14. WP7. Task details and leaders appointment	30
Table 15. SHIFT - List of milestones	32
Table 16. Qis for SHIFT project	35
Table 17. Recommended timeline to edit SHIFT reports	41
Table 18. SHIFT critical risks & risk management strategy	47

LIST OF FIGURES

Figure 1. SHIFT overall organization and governance rules	9
Figure 2. Management structure	10
Figure 3. SHIFT PERT diagram	21
Figure 4. SHIFT project Gantt chart	22
Figure 5. Project Management system	34
Figure 6. Quality indicators composition	35
Figure 7. Principles, framework and risk management process from ISO 31000	45
Figure 8. Risk Management process	46
Figure 9. ECAS reporting timeline	51
Figure 10. Semester financial report template	53
Figure 11. Semester technical report template	54
Figure 12. Structure of SHIFT report	56



ABBREVIATIONS AND ACRONYMS

ABBREVIATION / ACRONYM	DESCRIPTION
DESCA	Development of a Simplified Consortium Agreement
EB	Executive Board
EC	European Commission
ECAS	European Citizen Action Service
EU	European Union
GDPR	General Data Protection Regulation
KPI	Key Performance Indicator
IPR	Intellectual Property Rights
ISO	International Standardisation Organisation
MoM	Minutes of Meeting
PC	Project Coordinator
PERT	Program Evaluation Review Technique
PO	Project Officer
QA	Quality Assurance
QIs	Quality Indicators
REA	Research Executive Agency
TOC	Table of Content
TL	Task Leaders
WP	Work Package
WPL	Work Package Leader

GLOSSARY OF TERMS

Terminology	Description
Quality Assurance	All the systematic and planned activities implemented within the quality system and demonstrated as needed, to provide adequate confidence that an entity will fulfil requirements for quality.
Reviews	Activities during the project life cycle consisting in reviewing the progress through a life cycle phase or with a particular product or service.

1 INTRODUCTION

1.1 Scope and objectives

The present document represents the Handbook for the Horizon Europe project – “MetamorphoSis of cultural Heritage Into augmented hypermedia assets For enhanced accessibiliTy and inclusion” (short, SHIFT) - Grant Agreement 101060660.

The SHIFT project consortium is composed of 13 organizations from 8 countries:

Table 1. SHIFT project consortium

Organizations	Country	Role
SIMAVI - SOFTWARE IMAGINATION & VISION	Romania	Coordinator
FORTH - IDRYMA TECHNOLOGIAS KAI EREVNAS	Greece	Partner
MDS - MASSIVE DYNAMIC SWEDEN AB	Sweden	Partner
AUD - audEERING GmbH	Germany	Partner
UAU - UNIVERSITAET AUGSBURG	Germany	Partner
SOMKL - MAGYAR NEMZETI MÚZEUM – SEMMELWEIS ORVOSTÖRTÉNETI MÚZEUM	Hungary	Partner
ANBPR - THE NATIONAL ASSOCIATION OF LIBRARIANS AND PUBLIC LIBRARIES IN ROMANIA	Romania	Partner
SPK - STIFTUNG PREUSSISCHER KULTURBESITZ	Germany	Partner
BMN - THE BALKAN MUSEUM NETWORK	Bosnia and Herzegovina	Partner
HERITAGE - HERITAGE MANAGEMENT	Greece	Partner
ERC - ETICAS RESEARCH AND CONSULTING	Spain	Partner
DBSV - GERMAN FEDERATION OF THE BLIND AND PARTIALLY SIGHTED	Germany	Partner
QMUL - QUEEN MARY UNIVERSITY OF LONDON	United Kingdom	Associated Partner

The main purpose of **D7.1 – Project Handbook** is to establish a common working framework for the SHIFT project. To define applicable standards, rules and procedures. The procedures that will govern the delivery of the reports, together with their monitoring mechanisms and communication between the consortium partners, are highlighted throughout the current deliverable. Also, the current scope of the report is to carry out the management, coordination and reporting activities necessary to implement the principles of project management and to ensure the effective implementation of the project in accordance with the guidelines of the European Commission (H2020AMGA) [AGA], Grant Agreement (GA) [GAG19] and the Consortium Agreement (CA) [CAG19].

1.2 Structure of this deliverable

The D7.1 Project Handbook is structured to cover all management-related activities, providing information about the tools to be used in SHIFT to efficiently organize the workflow. This report reinforces the work defined in the initial project documents (DoA, GA and CA) and serves as reference about the procedures, templates and practices to be applied during the project lifetime by consortium partners and in communication with the EC.

The EC is represented by Melpomeni VYZIKA the Project Officer (PO). Communication between the project and the EC is handled by SIMAVI via the Project Coordinator (PC).

This report can be regarded as a “living document”, to be updated all along the project duration. Thus, the version presented at its deadline (M3) compiles all tools set up initially and the procedures agreed to be used during all SHIFT lifetime. However, the document will be updated accordingly, in case of any change within the next 3 years.

The process of presenting all of these topics in a comprehensive way led to the following document structure:

Section 2. Governance and Communication describes the management structure, roles and responsibilities, collaboration and common repository, information flow organization of meetings.

Section 3. Project Management presents the project management approach and structure alongside with the timeline and work breakdown structure and task details focusing on sub-tasks and role assignment.

Section 4. Quality Management includes the definition of quality management system, quality indicators and their assigned target values. Moreover, quality assurance describes the process of editing, contributing and reviewing of a deliverable and templates alongside with the treatment of document considering their dissemination level (Public, Classified or EU Restricted).

Section 5. Risk Management described the approach to risk management. Starting from the risks already identified in the DoA a risk assessment and treatment are proposed.

Section 6. Monitoring and reporting procedures outlines the reporting procedure agreed among SHIFT partners.

2 GOVERNANCE AND COMMUNICATION



This section presents the management structure of SHIFT in terms of roles, duties and communication both internally and with external entities alongside with a focus on relations with the EC and Research Executive Agency (REA).

2.1. Organization and governance

The overall organization (Figure 1, below) of the SHIFT project have three main pillars:

- **Funding Authority** Research Executive Agency (REA) represented by the Project Officer (PO)
- **SHIFT Consortium** members and
- **Project Coordinator (PC)** is part of the SHIFT Consortium and the single point of contact with the Project Officer (PO).

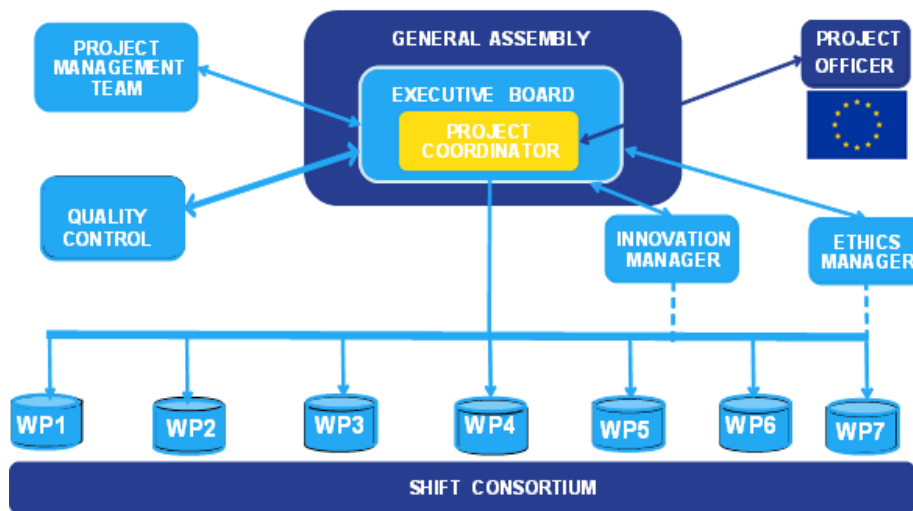


Figure 1. SHIFT overall organization and governance rules

2.1.1. Assigned roles within SHIFT

Inside SHIFT Consortium from top down the General Assembly is the body taking the decisions inside SHIFT project. The EB - Executive Board monitors both the administrative and the scientific activities and results of the project. Furthermore, works on limiting the risk of overlapping and/or sensitive contents to be included in different reports. The representatives EB are: Work Package Leaders (WPL), Quality Assurance and monitoring (QA), Innovation Manager and Ethics Manager plus the Project Coordinator.

Furthermore, a Project Management Team (PMT) assisted by quality members will perform a final check of the contents included in the report against objective achievement and the dissemination level assigned.

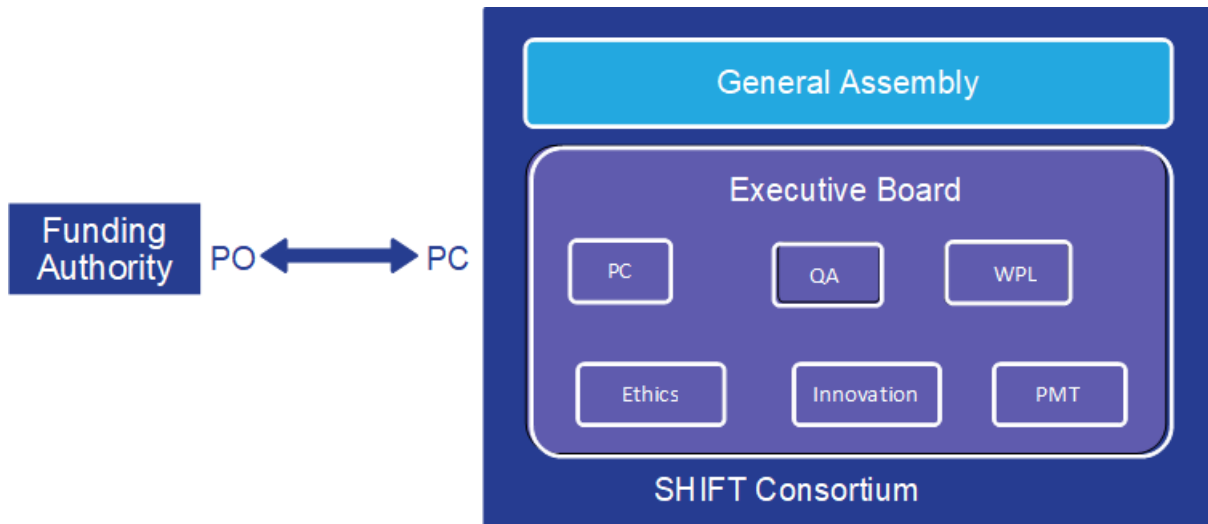


Figure 2. Management structure

Roles of the entities defined within SHIFT are:

- GA - the ultimate decision-making body of the consortium. This body has one representative from each consortium partner and is responsible for decisions concerning SHIFT project and affecting the consortium as a whole.
- EB - the supervisory body for the execution of the project which reports to the GA. Together with the PC, it is in charge of assessing the proper technical and scientific discourse of the project.
- SHIFT Consortium – all consortium partner team members contributing to the achievement of objectives.
- PMT - is in charge of all administrative, financial and external relationship takes within SHIFT.
- PC - is the key contact point in charge of interfacing with the European Union Commission relevant departments, as well as structuring, and organizing the entire project.

2.1.2. General assembly

The GA is the ultimate decision-making body of the SHIFT Consortium. Decisions to be taken by the GA may refer to content, finances and intellectual property rights, evolution of the consortium, appointments and may include the following:

- Amendments of Grant Agreement [CAG19].
- Project budget, its allocation and potential modifications.
- Monitoring reporting and quality assurance activities so that they are consistent with the Intellectual Property Rights (IPR) directives in the Consortium Agreement [CAG19].
- Evolution of the consortium
- Appointments (of the Executive Board Members based on GA provisions)
- Selection of the tools to be used to distribute and share information.
- Nominate default partners to attend regular annual GA meetings.

During the first SHIFT GA which took place on the second day of the Kick-off Meeting [KOM22] the preliminary list of main and back-up contacts has been established as presented in the Table 2.

Table 2. SHIFT GA members

Partner	Main contact	Back-up contact
P1_SIMAVI	Razvan Purcarea	Monica Florea
P2_FORTH	Constantine Stephanidis	George Margetis
P3_MDS	Sokratis Nifakos	Natalia Stathakarou
P4_AUD	Dester Florian	Burkhardt Felix
P5_UAU	Andreas Triantafyllopoulos	Adria Mallol-Ragolta
P6_SOMKL	Tvergyak Klaudia	Papp Geza
P7_ANBPR	Ioana Crihana	Stefania Stanica
P8_SPK	Katja Hesch	Andreas Bienert
P9_BMN	Aida Vezik	Milošević Milena
P10_HERITAGE	Rob Davis	Evangelos Kyriakidis
P11_ERC	Zamorano Martin	Miguel Azores
P12_DBSV	Delgado Reiner	Merve Sezgin
P13_QMUL	Chandramouli Krishna	Vicky Byers

The GA is chaired by the PC. All other partners should nominate a contact person to act as a GA member to ensure that all partners are represented and equally weighted on the decision making voting process.

2.1.3. Executive board

The EB is appointed by GA and has as members work package leaders (WPL), Quality Assurance and monitoring (QA), Innovation Manager and Ethics Manager and the PC.

The responsibilities include:

- Make strategic decisions concerning project coordination, direction, and overall management and planning.
- Project Risk Management.
- Monitor the effective and efficient implementation of the Project.
- Support the Coordinator in preparing meetings with the Funding Authority and in preparing financial and technical reports.
- Make proposals to the GA considering the evolution of partners.
- Keep the innovation alive.
- Ethics requirements identification and monitoring implementation.
- Quality control and monitoring.

2.1.3.1. Innovation and IPR management

Innovation management is part of Innovation Activities (WP1 to WP4) constituting the core tasks of the project towards user requirements, solution design, applications development and will be coordinated by the Leader of WP7, SIMAVI.

Simona Bica (SIMAVI) is the appointed Innovation Manager that will represent the Consortium and will be strongly supported by QMUL and all consortium members.

The task includes the following activities:

- Development of an effective innovation strategy and the management of Intellectual Property Rights (IPR) resulting from the project.
- IPR Management (D7.2) will be produced, defining the foreground as well as background IPR of the project. The IPR Management will continuously be updated and managed throughout the project in accordance with the collaboration agreement and the innovation strategy.

2.1.3.2. Ethics management

Ethical management establishes the ethical requirements that the project must comply with and frequently verifies threats and/or violations at the partner and/or project level and prepares specific reports following the structure and schedule provided and described in the Grant Agreement.



The appointed Ethics Advisor is **Zamorano Martin** from Eticas Research and Consulting (ERC).

The role of the Ethics Advisor is to contribute to the identification of the ethics requirements of the SHIFT project, along with the identification and assessment of current and future legal and regulatory frameworks relevant to the SHIFT solution.

2.1.3.3. Work package leader

Both the Work Package Leaders (WPL) and the Task Leader (TL) have important roles in the EB. The WPLs coordinate (both technical and administrative issues) of a WP, while the TLs are in charge of a single task and reports directly to the corresponding WPL.

All WPLs are automatically appointed as members of the EB. The list of WPLs is presented in Table 3, below. EB meetings will be organized jointly with GA meetings when possible and, if not, will be organized as remote / virtual meetings, in an attempt to reduce costs.

Table 3. Work Package Leader Board

WPs	Organization and Name	Email
WP1	SOMKL – Klaudia Tvergyak	tvergyak.klaudia@hnm.hu
WP2	QMUL – Krishna Chandramouli	krishna.chandramouli@qmul.ac.uk
WP3	FORTH - George Margetis	gmarget@ics.forth.gr
WP4	UAU – Andreas Triantafyllopoulos	andreas.triantafyllopoulos@uni-a.de
WP5	SIMAVI - Adrian Dragota	adrian.dragota@siveco.ro
WP6	HERITAGE – Rob Davis	rob.davies2507@outlook.com
WP7	SIMAVI - Razvan Purcarea	razvan.purcarea@simavi.ro

The matrix of duties for work package and task leaders are described in Table 4, below.

Table 4. Matrix of duties

Area	WPL	TL
<ul style="list-style-type: none"> Management 	<ul style="list-style-type: none"> Design a coherent and consistent work plan to follow-up and monitor efficiently the WP Coordinate the technical work within the WP. 	<ul style="list-style-type: none"> Design a coherent and consistent work plan to follow-up and monitor efficiently the task

	<ul style="list-style-type: none"> Follow the progress of tasks and provide suggestions and recommendation Avoid overlapping contents 	<ul style="list-style-type: none"> Coordinate the technical work within the task Draft an appropriate analytical framework
<ul style="list-style-type: none"> Quality 	<ul style="list-style-type: none"> Check the alignment of the task work with the objectives Call for and organize WP meetings 	<ul style="list-style-type: none"> Collect relevant information from contributing partners as early and as formal as possible Contribute to deliverables content Call for and organize task meetings
<ul style="list-style-type: none"> Reporting 	<ul style="list-style-type: none"> Contribute to the intermediary and Final Reports Report technical progress to the PC 	<ul style="list-style-type: none"> Give technical support to WPL through in-depth understanding of technologies developed Edit the reports

2.1.3.4. Project Coordinator

The Project Coordinator (PC) is the central and key contact of SHIFT, as it is the official interface person with the EU Commission. The PC of SHIFT project is Razvan Purcarea (SIMAVI).

PC duties are summarized below:

- Monitoring participant’s obligations with respect to both the GA (including IPR, dissemination and use) and the CA.
- Chairing GA sessions on meetings.
- Administration and minute taking of GA sessions.
- Ensure all payments are made without (unjustified) delay.
- Store financial records of project funding (per partner), informing the EU commission of such events.
- Define templates and standards for documents.
- Set up and maintain a project repository with relevant document information.
- Check and ensure the required quality of all documentation before delivery.
- Provide pertinent IT tools and make them available to all partners so as to enable cooperation and efficient information sharing.



- Present and explain comments received from the European Commission.
- Interface with the PO.

These responsibilities are mapped on the project lifetime as detailed in Table 5 where all important deadlines are highlighted, together with the expected outcome, in the form of a document to be delivered.

Table 5. PC timeline

Due	Report
M3	Project Handbook
M6	Data Management Plan & Ethical compliance
M24	Progress Report
M36	Data Management Plan & Ethical compliance – final version
M36	IPR Management

One of the key roles of the PC is the financial management. This includes receiving and transferring payments by the European Commission to the consortium partners, while keeping advance payments on a well identified account. This implies a need for financial accounting within the consortium, including:

- Consolidating individual cost reports from partners (including cost statement and certificate, person-month (PM) justification and financial summary) and reporting the overall project cost to the EC.
- Reporting of aforementioned cost report to the Executive Board
- Requesting audit certificates from partners (if necessary).
- Following income and expense plan execution
- Monitoring the execution of provisional budget and deliverables
- Recovery of due sum and reports.

2.1.3.5. Project management team

The project management team is assigned by the PC and will provide feedback to the Partners upon request, and will issue guidelines on several issues regarding the required project administrative actions (timesheets, semi-annual reports, Cost Statements, allowable costs, etc.).

The Project Management Team will meet on a regular basis to analyze the status of the activities of the project and propose recommendations if necessary.

2.1.3.6. Quality Management Team

Dana Bichir, Vice-president HR & Governance at SIMAVI is assigned Quality Manager of the SHIFT project. The responsibilities of the Quality Manager refer to:

- Define the quality management strategy.
- Define the quality indicators.
- Monitor the quality compliance and progress.

2.2. Collaboration

Communication is a challenge in collaborative projects with a large number of partners. It is also an important aspect in succeeding to obtain significant results in a complex project like SHIFT. However, this has to be based on a clear management guide that defines the roles of the partners, so that they match the communication requirements. The PC has the central role in this communication role, with a proactive involvement.

A mailing list including representatives from all partners has already been created (shift@simavi.ro). A separate group e-mail will be defined for the GA and any other if necessary.

Communication and working language is UK English and the document exchanges with other parties will be based on standard applications: for example, Microsoft Office 2010 (or newer versions if necessary).

2.2.1. Information flow

The information flow within the project consists of exchange of internal technical documents and reports. Documents will be stored in a common repository and notifications about changes will be sent via e-mail.

Confidential documents will be marked appropriately, on the document cover page or on the bottom of the page.

The final version of the reports will be submitted in European Citizen Action Service (ECAS) by the PC to be reviewed by PO.

2.2.1. Repository

A repository of deliverables is set up using:

<https://simaviro.sharepoint.com/sites/SHIFT/Shared%20Documents/Forms/AllItems.aspx?id=%2Fsites%2FSHIFT%2FShared%20Documents%2FGENERAL%2FDELIVERABLES&viewid=0e2fbf40%2D17e5%2D405f%2D8c54%2Dd6d173d81c4c>

This repository is web-accessible and the information is stored on SIMAVI premises. Every SHIFT team member received an individual account. All the data provided by partners (name, surname, e-mail address or phone

number) will be used only within the framework of SHIFT project and during its lifetime.

The repository has a user friendly web based application interface, with access offered to all deliverables at the latest version.

A tri-fold root structure (management, meetings and work packages) was proposed to ease the access to SHIFT content.

- **Management** including contractual documents, templates, logos and SHIFT Contact list.
- **Plenary Meetings** including all the relevant document from online and face-to-face project meetings.
- **Work Packages** – one dedicated folder for each work package of the project.

The proposed structure of subfolders for work package folders, includes the following sections:

- **Admin** section dedicated to generic documents like: contact mailing list, task organisation and effort allocation; etc.
- **Deliverables** – each deliverable has a separate folder with the following structure:
 - *Contributions, report versions.* Task leaders and contributing partners are requested to use this folder to save the version of the report and own contributions to the report (chapter, sections or filled surveys).
 - *Final release.* This section is dedicated to the Coordinator and here the versions submitted to EC will be saved; also the improved versions after feedback received from PO or external experts will be stored.
 - *Review.* The versions with the suggestions from the overall and quality reviewers will be stored in this folder.
- **Meetings and calls** section where agenda, presentations and meeting outcomes should be saved.
- **Reference** section where partners are invited to save relevant articles, reports, methodologies, etc.

All electronic projects' artefacts will be stored in the repository and are subject to the coordinator's standard backup strategy (Incremental Daily backups, full weekly backups).

All physical projects' artefacts (documents, CD/ DVD-ROMs, tapes) documents will be stored in the consortium member's offices.

2.2.3. Project meetings

Online or face-to-face meetings can be scheduled using Teams or any other tool previously accepted by Consortium partners. Whenever possible, meetings will be collocated, to minimise expenses and travel time.

2.2.3.1. Meeting Agenda

The Meeting Chair is the person calling for the meeting and is responsible for distributing the agenda and the meeting minutes. The Agenda should be shared before the meeting to ensure that all partners can add items, if necessary.

2.2.3.2. Meeting Minutes

Meeting minutes are distributed within 10 working days by the Meeting Chair to all the partners. The opinions registered and the action points listed at the end of the Meeting Minutes need to be acknowledged by all partners attending the meeting. If no comments or suggestion provided within 5 working days, the meeting minutes will be considered accepted and uploaded on the common repository in pdf format.

2.2.3.3. Type of meetings

SHIFT Consortium decided upon the following types of meetings alongside with a provisioned frequency:

- The GA meets once a year (in one of the two plenary face-to-face meetings scheduled).
- The Consortium meets twice a year face-to-face.
- Monthly plenary meetings to discuss the status of project with a focus on the ongoing work packages and tasks, risk assigned, next steps and open issues.
- Offline meetings dedicated to WPs or tasks as often as necessary.
- Additional ad-hoc meetings, involving just one WP or a particular pilot inside SHIFT, may also take place, and will be scheduled based on the needs.

In Table 6, below, are summarized the main meetings provisioned in the SHIFT project, alongside with the corresponding prerequisites.

Table 6. Type of meetings

Type of meeting	Objectives	Audience	Frequency /Time	Medium	Deliverables
Kick-Off Meeting	Introduce the SHIFT teams Review project scope, objectives and management	All partners	Once, M1 (17-18.10.2022)	Online	Agenda Meeting minutes Action plan

Plenary Meetings	Monitor project progress, ensure correct implementation, decide about future plans	All partners	2-3/year	Face to face	Agenda Review report
Consortium Meetings	Monitor project progress, ensure correct implementation, decide about future plans	All partners	1/month	Online	Agenda Review report
Project Reviews	Evaluation of project results by European Commission	All partners	M15/M36	On-line	Agenda Review report
Technical Meetings	Evaluate technical results, monitor design and implementation	Technical partners	1/month	Face to face or tele-conference	Agenda Meeting minutes Action plan

2.2.3.4. Face to Face Meetings

Face to Face (F2F) project meetings are important to closely follow up the project progress. F2F meetings are also very productive when it comes to organizing work, managing collaborations and transferring knowledge and results to partners.

SHIFT plans to have at least two F2F meetings per year, starting January 2023. At least one GA meeting every 12 months will be scheduled and at least one SAB meeting every three months.

A couple of meetings per year are scheduled and a proposal for the schedule is presented in Table 7, below, and partners were invited to volunteer for hosting the next meeting.

Table 7. Planned face-to-face meetings

#	Type	Date	Location	Hosting partner
1	Plenary Meeting	March 2023	Hungary	SOMKL
2	Plenary Meeting with GA	June 2023	Serbia	BMN
3	Plenary Meeting	November 2023	Romania	SIMAVI
4	Plenary Meeting with GA	May 2024	Greece	HERITAGE

5	Plenary Meeting	October 2024	tbd	tbd
6	Plenary Meeting with GA	2025	tbd	tbd
7	Plenary Meeting	2025	tbd	tbd

2.2.4. Templates

The Coordinator designed and shared with the Consortium the following templates:

- SHIFT_Document_Template
- SHIFT_Agenda_Template
- SHIFT_Meeting Minutes Template
- SHIFT_Presentation

3. PROJECT MANAGEMENT

3.1. Approach

Project management covers aspects such as technical, economic and administrative coordination. An important aspect in managing a project of the technical complexity of SHIFT is to have transparent decision-making processes and prompt reporting mechanisms, within a professional and flexible management structure.

The project management is founded on the contract with the European Commission [GAG] alongside with the Annotated Model Grant Agreement [AGA]. It considers the project scope / baselines and the DESCA [DES19] agreement that establishes the obligations in the relationships between partners.

Quality and risk management are the activities that ensure the project stays on track.

- **Quality management** contributes to ensuring an efficient collaboration between the consortium partners and delivery of product results.
- **Risk management** provides the techniques for the control of potential project risks, with an emphasis on a precautionary diagnosis and handling.

3.2. Project Management Structure

The SHIFT project management considers the expertise and interest of all partners in order to plan the time and execution of an effective project. This

effective management process is structured so that responsibilities are allocated in a hierarchical way.

Each Work package and Task is led by the partner with the most relevant domain expertise. They are responsible for coordinating corresponding efforts accordingly. Task Leaders (TLs) are the first to signal progress on deliverables, completion of tasks, problems, delays or conflicts. Reporting can escalate to the Project Coordinator assisted by the Executive Board, the final decision body.

3.3. Work breakdown structure

SHIFT is a 36 months project and the work is concentrated on six aspects: users requirements, tools development, architecture design, integration, validation and demonstration. All those activities are followed in parallel by Project Management, Dissemination and Exploitation. The PERT diagram (Figure 3, below) outlines the interdependencies between the WPs, whereas the Gantt chart (Figure 4, below) of the project provides the time schedule of the activities as illustrated in the table below.

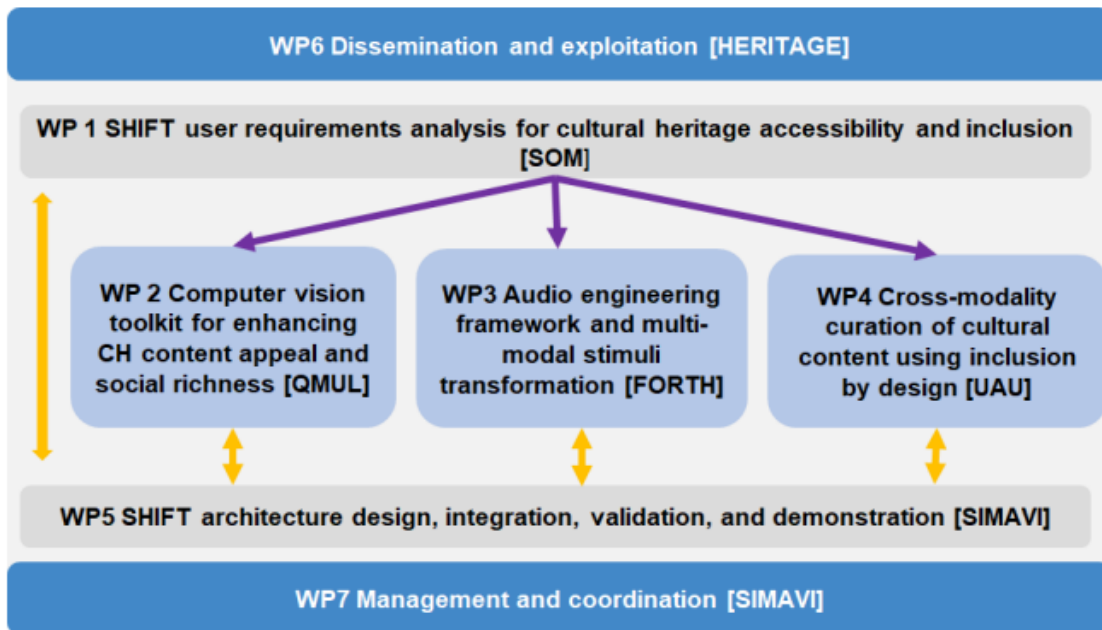


Figure 3. SHIFT PERT diagram

A work breakdown structure is given below. The work products and services, that constitute the outcome of each activity are provided under each WP. The deliverables will be presented in the List of Deliverables (Annex A) and also a List of Milestones (Table 15) can be found below.

Below each WP is summarized in a table, detailing each task with the following info that will be included:

- Leaders. Appointment of particular organization for each duty in the task, including the task itself, potential sub-tasks.
- Schedule. Time plan associated with each task.
- Short description. A short description of each task is provided.

Table 8. WP1. Task details and leaders appointment

WP1	SHIFT user requirements analysis for Cultural Heritage accessibility and inclusion		
WP Leader	SOMKL		
Task	T1.1 Stakeholder Requirements Study on Cultural Curation, Accessibility, Inclusion and Storytelling		
Task leader	ANBPR		
Start date	M1	End date	M12
Short Description	The objective of this task is to conduct a comprehensive stakeholder user requirements study on the various challenges commonly encountered on the extended usability of cultural content.		
Task	T1.2 Specification of SHIFT Components for Deployment Lifespan		
Task leader	SMB		
Start date	M3	End date	M12
Short Description	The aim of this task is to develop the five-year/ ten-year roadmap of IT infrastructure availability across SHIFT stakeholder organizations to identify the deployment lifespan of SHIFT components.		
Task	T1.3 SHIFT User Evaluation Guidelines and Acceptance Metrics		
Task leader	DBSV		
Start date	M1	End date	M12
Short Description	In this task, a set of formal guidelines, laid on the foundations of international standards and well-established practices regarding systems' usability, accessibility and user acceptance, will be developed in consultation with the stakeholders to facilitate the user evaluation studies as outlined in WP5 for each of the individual pilot and case-studies.		



Task	T1.4 SHIFT Content Aggregation and Distribution Process from End-user Organization to Technology Providers		
Task leader	SOMKL		
Start date	M3	End date	M12
Short Description	The development of the SHIFT Cloud platform will follow a data-driven approach in which each of the system components and the overall platform will be validated against the cultural curation content. In this regard, the task will formalize the processes and procedures adopted to enable content sharing between end-user organization and the technology partners as well as distributing SHIFT content through broker agencies and international distributors.		
Task	T1.5 Ethics and legal aspects regarding SHIFT end-user evaluation		
Task leader	ERC		
Start date	M1	End date	M12
Short Description	Compliance with data protection regulation has to be guaranteed by design, so new technological systems protect privacy rights. On the other hand, collecting, classifying, and releasing heritage-related information can affect human integrity or other rights. This task will identify and frame the requirements and principles that should guide the proposed solution (WP2-5), both in terms of its technical challenges as well as in terms of supporting cultural organizations to develop appropriate management strategies.		

Table 9. WP2. Task details and leaders appointment

WP2	Tools for authoring augmented hypermedia and gesture recognition for enriched accessibility		
WP Leader	QMUL		
Task	T2.1 Deep-learning architecture design and implementation for foreground/background object detection		
Task leader	MDS		
Start date	M3	End date	M30
Short Description	This task aims to develop an algorithm to distinguish between foreground and background objects from pictorial cultural archives. Addressing the task as an instance-aware semantic segmentation, the task will develop unsupervised method will be capable of generating high-quality saliency maps that give a coarse distinction between the foreground and background objects of the image, using advanced RNN and RBN based architectures.		
Task	T2.2 Physics informed deep-learning network architecture		
Task leader	QMUL		
Start date	M3	End date	M30



Short Description	The task will investigate the application of physics-informed ML to the CH photographic archive to model the spatial scope of motion sequence generation.		
Task	T2.3 Generation of motion-sequences for foreground objects using GANs		
Task leader	QMUL		
Start date	M3	End date	M30
Short Description	The aim of this task is to combine the outcome of T2.1 and T2.2 to generate structured short and long- unsupervised motion sequences generated from pictorial repositories. The task will propose novel deep-learning models that are trained on a set of heterogeneous parameters ranging from saliency map representations to structured knowledge models represented as linguistic rules.		
Task	T2.4 Action sequence recognition within CH video repository		
Task leader	MDS		
Start date	M3	End date	M30
Short Description	The task will implement deep-learning algorithms for action recognition from video sequences of CH repository. The scope and definition of action vocabulary will be defined within WP1 and will aid in the automatic generation of audio captioning solution in WP3.		

Table 10. WP3. Task details and leaders appointment

WP3	Audio engineering framework and multi-modal stimuli transformation		
WP Leader	FORTH		
Task	T3.1 Comprehensive textual representation of assets based on NLP approaches		
Task leader	UAU		
Start date	M3	End Date	M24
Short Description	This task will leverage the knowledge and semantic features that will be extrapolated by the analysis of the cultural assets per-se (WP2) and the relevant knowledge base that the project will be built up (WP4) towards creating comprehensive textual representations of the CH assets. The devised mechanism will employ state-of-the-art NLP approaches to learn temporal embeddings and apply regularization terms to smooth embedding changes across time.		
Task	T3.2 Modelling Temporal Evolution of Language for Cultural Asset Curation		
Task leader	UAU		
Start date	M3	End date	M30
Short Description	The aim of this task is to create linguistic models using deep learning algorithms to model associations of temporal evolution that enable time-independent curation and map contemporary asset description with archive representation. The deep learning		



	algorithms will be used to extract and train on inherent linguistic patterns used for the description of cultural assets. This task will aggregate necessary resources from external sources.		
Task	T3.3 Text and video to speech production tool for the affective narration of cultural heritage assets		
Task leader	AUD		
Start date	M3	End date	M30
Short Description	Laid on the foundations of the work that will be conducted in T3.1 and the outcome of WP4 this task will aim to devise an audio generation tool able to provide auditory cues regarding the vocalized representation of CH assets. In order to do so, the tool will incorporate sentiment analysis and emotion recognition ML models that will be trained on information corpora related to CH hypermedia towards providing a robust text-video to speech representation mechanism.		
Task	T3.4 Haptic techniques for 3D digital asset perception		
Task leader	FORTH		
Start date	M3	End date	M30
Short Description	For SHIFT to provide a multimodal inclusive approach of CH assets representation, this task will focus on providing haptic based interaction, complementing the alternative means that the information is conveyed to the end-users. To that end, methods and tools will be devised to be employed in haptic devices, so as to reproduce multi-properties of tangible CH assets and support multi-gestures to perform fine manipulation of their digital twins. Several, haptic devices will be explored towards widening the spectrum of haptic stimuli, including forces, vibration, and shape.		
Task	T3.5 Accessible framework of inclusive museum exhibits for 3D digital asset perception		
Task leader	FORTH		
Start date	M3	End date	M30
Short Description	This task will harness the technologies of the above-mentioned tasks into one framework that will be able to provide multimodal interaction and multifaceted personalized information to the end-users, considering their accessibility needs and individual characteristics. The framework will devise an ontology-based user-model based on the user-requirements of T1.1 that will be able infer adaptations regarding the information provided for a CH asset, based on each individual user-profile. The framework will constitute an integral component of the overall platform and will be responsible for safeguarding the accessibility and inclusiveness of the system.		



Table 11. WP4. Task details and leaders appointment

WP4	Cross-modality curation of cultural content using inclusion by design		
WP Leader	UAU		
Task	T4.1: Cultural Asset Pre-processing and Feature Extraction for Media Curation		
Task leader	UAU		
Start date	M3	End date	M30
Short Description	The objective of this task is to develop multimedia content analysis algorithms suitable for processing cultural archives and produce suitable features, extracted from these archives that can be used for enabling content enrichment, linking with related information (T3.2), semantic segmentation (T4.1) and storytelling (T4.2).		
Task	T4.2: Multimedia Cultural Asset Curation Based on Association by Design		
Task leader	UAU		
Start date	M3	End date	M30
Short Description	In this task, the features extracted in T4.1 will be analyzed to implement the methodology of association by design for establishing the correlation between cultural assets. More specifically, the next line of activities in the context of WP4 relates to the use of features extracted in T4.1 for interlinking the cultural assets among themselves, but also with external information.		
Task	T4.3: Distribution SHIFT Curation Repository for Cultural Assets		
Task leader	SIMAVI		
Start date	M3	End date	M30
Short Description	The objective of this task is to develop interfaces that is capable of integrating with existing cultural asset repositories, content management systems (CMS) and different digital rights management systems (DRM) such as Europeana, Movio, Curata, Carare, Minerva, Michael+, HeritagePortal.eu, Spectrum, Google Art Culture, ECLAP - European Collected Library of Artistic Performance, in addition to complementing the cross-platform integration with other stakeholder organizations (including museums, broadcasters, schools, etc.).		
Task	T4.4: Digital Rights Management (DRM)		
Task leader	QMUL		
Start date	M3	End date	M30
Short Description	The objective of this task is to develop a digital right management component which enables authentication of accessibility to content processed by SHIFT platform. The authentication mechanism will include certificates that will analyze when users of the Cloud platform want to use them, and can be later traded, tracked or		



	loaned, thereby creating a chain of ownership for that work, resulting in media content sharing by means of contracts
--	-----------------------------------------------------------------------------------------------------------------------

Table 12. WP5. Task details and leaders appointment

WP5	ToolKit integration		
WP Leader	SIMAVI		
Task	T5.1 End-to-end Platform Architecture, Specifications and Development lifecycle		
Task leader	SIMAVI		
Start date	M3	End date	M12
Short Description	A single architecture document with detailed component sub-architectures is required to be created, to fully cover all the functionality of SHIFT platform. The document describes the proposed prototyping approach for designing the modular SHIFT Platform. It is based on the user requirements specified in the User Experience Stories and partner input.		
Task	T5.2 Integration of the system components into the SHIFT platform		
Task leader	SIMAVI		
Start date	M8	End date	M33
Short Description	In the context of this task integration activities will take place towards harnessing the SHIFT components and tools into one platform. In order to do so the Continuous Integration / Continuous Delivery (CI/ CD) approach will be followed, safeguarding this way the agile development of all the components. CI/CD is a much less risky approach wherein the components and subsystems are integrated as they are developed into multiple working mini-versions of the system. All system components of SHIFT will be integrated using a common service specification, developed at the previous task.		
Task	T5.3 Functional Testing of end-to-end SHIFT platform		
Task leader	SIMAVI		
Start date	M12	End date	M33
Short Description	Functional testing is a type of testing which verifies that each function of the software application operates in conformance with the requirement specification. This testing mainly involves black box testing, and it is not concerned about the source code of the application. All functionalities of the system are tested by providing appropriate input, verifying the output and comparing the actual results with the expected results.		
Task	T5.4 Pilots Set-up and User’s Involvement		



Task leader	ERC		
Start date	M12	End date	M33
Short Description	To provide the guidelines to set-up the field trails according to the below 4 categories. In addition, this task will be in charged to provide the most effective propositions to attract and motivate the users and stakeholders to participate to the trials in a proactive and useful way.		
Task	T5.5 SHIFT Demonstrations		
Task leader	SMB		
Start date	M18	End date	M36
Short Description	<p>The objective of the task is to coordinate the demonstration of SHIFT project outcomes with end-users. The following list of subtasks will be carried out in this task.</p> <ul style="list-style-type: none"> • T5.5.1: 19th to modern days Serbian paintings and modern art (Leader: BMN): The objective of this task is to realize an iterative evaluation of the selected tools. • T5.5.2: Experimenting the transformation of medicine and pharmacy (Leader: SOMKL): The objective of this task is to aims to emerge the visitors into the history of medicine and let them “feel” how different illnesses have been treated before modern times. • T5.5.3: Romanian history and customs explained to digital natives (Leader: ANBPR): The objective of this task is to test the innovative SHIFT tools and to support and engage at least 10 member libraries, • T5.5.4: CH exhibition as a visitor's journey with no sensing boundaries (Leader: SMB): The objective of this task is to realize an iterative evaluation of the provided tools by individuals with disabilities. 		

Table 13. WP6. Task details and leaders appointment

WP6	Dissemination and exploitation		
WP Leader	HERITAGE		
Task	T6.1 Communication, Dissemination Planning and Implementation		
Task leader	SOMKL		
Start date	M1	End date	M36
Short Description	Spread project knowledge and outcomes. Attend special sessions/conferences and workshops on related topics, strengthen cross project collaborations, participate in trade shows and submit articles to industry oriented publications.		
Task	T6.2. Dissemination Activities Targeting Stakeholder Markets		
Task leader	ANBPR		
Start date	M1	End date	M36



Short Description	Quantitative empirical evaluations of the platforms will be made in real world working conditions. A QoSstudy will reveal system performance, stability, and functionality from a Stakeholder perspective.		
Task	T6.3. Training and knowledge transfer		
Task leader	HERITAGE		
Start date	M10	End date	M34
Short Description	Heritage will collaborate with the partners involved in developing each of the 7 SHIFT tools to create a training module for each tool, which will be delivered as an online or hybrid workshop to the users of each pilot in combinations of modules relevant to the specific tools used in each pilot.		
Task	T6.4. Business Strategy and Market Validation		
Task leader	HERITAGE		
Start date	M18	End date	M36
Short Description	Develop a sustainable business model, making SHIFT part of the operational portfolio of the partners. Market research and cost/benefit analyses will be conducted to assess and validate the business model, including identification of stakeholders, potential investors, strategic partners, etc.		
Task	T6.5. Monetization Strategy		
Task leader	BMN		
Start date	M24	End date	M36
Short Description	Explore monetization strategies, examine both editions' uptake to finalize a market acceptable pricing scheme. Investigate how to maximize profitability based on early user feedback from Trials and demos.		
Task	T6.6. Market Expansion and Impact		
Task leader	ANBPR		
Start date	M24	End date	M36
Short Description	Generate hypothetical future operating scenarios (i.e., after project completion) and identify potential strategic partners that might enrich our products and platform. Major technology providers in the field of content creation and distribution will be contacted for product presentation and demos.		

Table 14. WP7. Task details and leaders appointment

WP7	Project coordination		
WP Leader	SIMAVI		
Task	T7.1 Management of the Consortium		
Task leader	SIMAVI		
Start date	M1	End date	M36



Short Description	This task aims at providing the overall coordination for the project that includes in association with the Project Management Board and WP leaders. The task will also provide project strategy to ensure the project achieves the set objectives.		
Task	T7.2 Financial Administration and Reporting		
Task leader	SIMAVI		
Start date	M1	End date	M36
Short Description	This task will establish reporting procedures to the EC and manage cost reports, including the collection and control of inputs and justification provided by partners. It will also cover controlling financial aspects of the project distribution of EC funding to partners.		
Task	T7.3 Project Quality Assurance		
Task leader	SIMAVI		
Start date	M1	End date	M36
Short Description	The quality methodologies and procedures applied will refer to: control actions planned and time schedule; requirement specifications and quality objectives will be clearly defined and documented; the work programme allocates clear, single organization responsibility for each task, even where the responsible organization should coordinate inputs from other participants; development, testing configuration, acceptance and maintenance plans will be defined and controller.		
Task	T7.4 Intellectual Property Rights and Patents Management		
Task leader	SIMAVI		
Start date	M1	Start date	M36
Short Description	This task will focus on all aspects related to the Intellectual Property Rights (IPR) management. The Consortium Agreement will be filing the gap for the IPR issues as there are no existing or future commercial agreements that will impose limitations on the patenting and exploitation of results.		
Task	T7.5 Data management & Ethical compliance		
Task leader	ERC		
Start date	M1	Start date	M36
Short Description	The objective of the task is to develop and provide data management policies and recommendations that relate to the planning, implementation and administration of the IT systems concerned with the acquisition, storage, security and retrieval, dissemination, archival and disposal of data collected within the project.		



3.4. List of milestones

Table 15. SHIFT - List of milestones

MS#	Milestone name	WPs	Lead	Due	Means of Verification
MS1	End user requirements aggregated, and SHIFT CH content repository distributed among partners	WP1	12-DBSV	M6	Publication of D1.1 and all partners acknowledge the receipt of the content.
MS2	Sprint 1 toolkits features are identified	WP2, WP3, WP4	6-SOMKL	M8	The list of features to be enabled by SHIFT tools is validated by end-users. D1.2 submitted.
MS3	Release of first version of SHIFT toolkits	WP2, WP3, WP4, WP5	3-MDS	M15	Demonstration of different tools for the end-users. D2.1, D3.1, D3.2, D3.3, D3.4, D4.1, D4.2 submitted.
MS4	Assessment of SHIFT toolkits with CH partners	WP5	1-SIMAVI	M18	Publication of the assessment outcomes to the community.
MS5	Sprint 2 toolkit features identified	WP5.WP1	2-FORTH	M21	Revised list of features for the CH stakeholders released. D1.4 submitted.
MS6	Release of second version of SHIFT toolkits	WP2, WP3, WP4	2-FORTH	M30	Demonstration of all tools identified to the CH stakeholders D2.2, D3.5, D3.6, D3.7, D3.4, D4.2, D4.3 submitted.
MS7	Assessment of final version of SHIFT toolkits with CH partners	WP5	8-SMB	M36	Publication of the assessment outcomes to the CH stakeholders D5.4 submitted.
MS8	Policy recommendation for post COVID-19 recovery of CH	WP2, WP5, WP6, WP1, WP3, WP4	10-HERITAGE	M36	New Business models to uptake SHIFT innovative tools and publication of the SHIFT white paper disseminated to the community D6.6 submitted.



4. QUALITY MANAGEMENT

This section covers the quality approach within SHIFT project.

4.1 Objectives

The main quality objective is to maintain and continuously improve performances through activity control, guaranteeing high quality deliverables, within a framework of global partnership focused on results. Thus, we ensure that:

- The project meets its schedule.
- The scope of the project is controlled.
- The documentation and services meet the predefined standards.
- The project costs are managed.

4.2 Quality Management System

The quality management system proposed for SHIFT project is governed by specific standards and methodologies alongside with guiding principles aiming at ensuring continues improvement throughout the entire lifecycle of the project. To control the process an iterative four-step management method is proposed – PDCA (plan, do, check, and act).



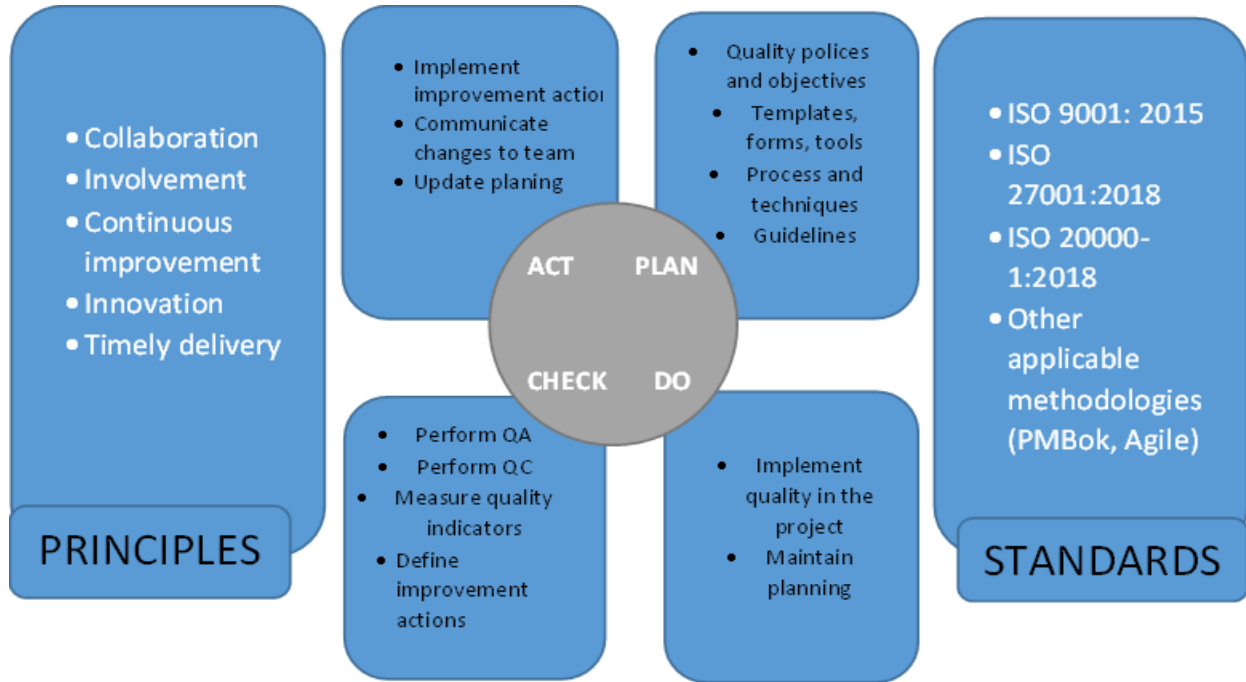


Figure 5. Project Management system

4.3. Quality indicators

As per ISO 9001:2015 [ISO18] performance indicators are tools used for determining how and to what degree an organization is meeting guidelines, policies, objectives, requirements and targets. Quality indicators measure the effectiveness of the development of activities or processes, delivering results based on the number of errors, or the number of perfect and flawless deliveries [ISO18].

Quality Indicators (Qis) group the **KPIs** of the project into 3 main categories:

- General contract
- Project output indicators

Each QI may be defined by one or many KPIs. For each QI, each KPI is characterized by a set of attributes, as explained in Figure 6, below:

- KPI ID – Sequential number used to identify the KPI;
- KPI Name – A name, which allows identifying fully the KPI;

- Calculation period/ Reporting period – Specifies the overall calculation and reporting period over which the KPI is calculated;

Target value – Target, which sets the level of the measurement.

The KPIs are computed every 12 months, as follows:

- M12 (start of the demonstrators),
- M24 (mid-point of the demonstrators) and
- M36 (end of the project).

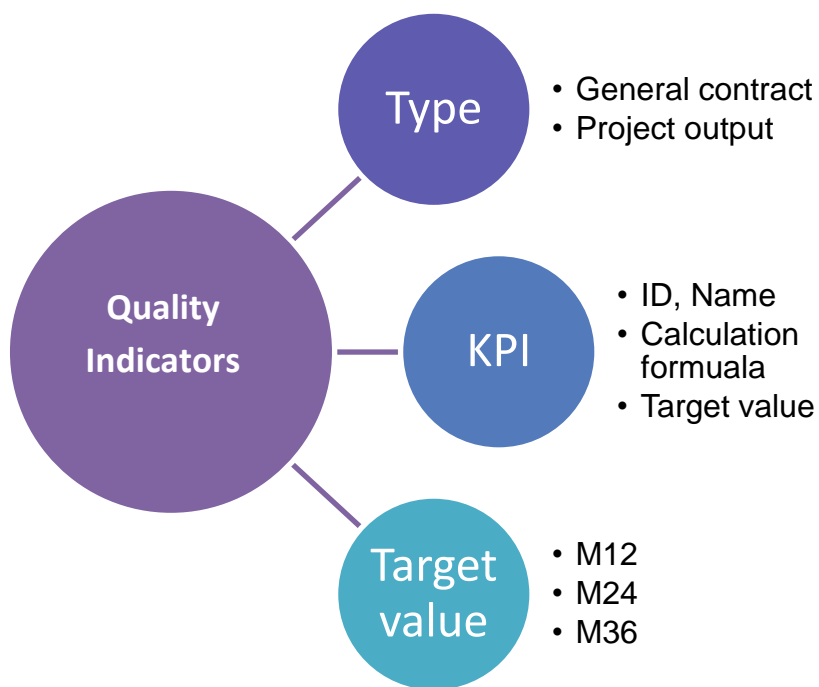


Figure 6. Quality indicators composition

4.3.1. Project QIs and KPIs

The QIs of the SHIFT project are summarized below.

Table 16. Qis for SHIFT project

Code	Type of QI	KPIs
QI 01	General contract	KPI 1.1 On-time delivery

		<p>KPI 1.2 Quality of deliverables</p> <p>KPI 1.3 Regularity of meetings</p>
QI 02	<p>Project output indicators - Adoption of digital transformation strategy within cultural heritage institutions</p>	<p>KPI 2.1 A minimum of 35 internationally reputed experts to be members of the global strategic alliance</p> <p>KPI 2.2 A minimum of 10 fields of expertise to be represented within the alliance including practitioners, conservationists, technologists, scientists.</p> <p>KPI 2.3 A minimum of 20 case reports to be analyzed by the experts in the network for the identification of causes, response assessment and lessons learnt.</p>
QI 03	<p>Project output indicators - Tools and algorithms to revitalise historical and cultural high value content</p>	<p>KPI 3.1 >4.000 images from the photographic archive to be analyzed and more than 75% of the analyzed content will be processed for generating motion-sequences.</p> <p>KPI 3.2 >500 hours of multimedia media content to be analyzed.</p> <p>KPI 3.3 >1000 individual short- and long- motion sequence clips to be generated from the photographic archive.</p> <p>KPI 3.4 A total of more than 5000 seconds of audio-visual motion-sequences augmented hypermedia assets to be generated which can be embedded within long-sequences of media footage.</p> <p>KPI 3.5 >100 users to be involved in the quality assessment of generated motion sequences throughout the duration of the project</p>
QI 04	<p>Project output indicators - Enriching user experiences for interacting with cultural assets</p>	<p>KPI 4.1 > 30 hours of audio content to be analyzed for detecting emotion signatures.</p> <p>KPI 4.2 > 10 3D digital objects to be modelled for haptics interface, generating a sense of touch.</p> <p>KPI 4.3 > 50 citizens to evaluate 3D digital representation solutions from diverse communities.</p>



<p>QI 05</p>	<p>Project output indicators - Enhance preservation of historical archive using contemporary language models</p>	<p>KPI 5.1 Deep-learning models and word embedding algorithms to be trained on at least 10,000 documents from historical archives.</p> <p>KPI 5.2 Automatic generation of text to speech for assisting citizens to experience cultural assets across 20 different scenarios (such as describing paintings, historical review of cultural assets, and others).</p> <p>KPI 5.3 The SHIFT platform will analyze more than 5 open data repositories for modelling temporal evolution of cultural assets.</p> <p>KPI 5.4 Linguistic models able to translate historical vocabulary references with contemporary language for at least 1000 words from cultural archives. • Text to speech toolkit for rendering audio narrative from at least 5 forms of textual modalities.</p>
<p>QI 06</p>	<p>Project output indicators - Development of accessibility tools and methodologies in compliance with international standards</p>	<p>KPI 6.1 Accessibility to information offered using at least three (3) multimodal toolkits.</p> <p>KPI 6.2 Demonstration of semantic framework for knowledge models for enriching accessibility to at least 50 different cultural heritage assets.</p>
<p>QI 07</p>	<p>Project output indicators - Implementation of inclusion by design methodologies</p>	<p>KPI 7.1 > 50 citizens from diverse background and abilities to evaluate the inclusion by design principles.</p> <p>KPI 7.2 > 5 different forms of cultural heritage assets to be supported by inclusive design.</p> <p>KPI 7.3 Multi-modal cultural experience to be offered through at least four (4) different exhibitions. organized by four (4) museums and libraries (BMN, ANBPR, SOM, SMB-PK).</p>



<p>QI 08</p>	<p>Project output indicators - Contribution to international standards to exchange metadata models with cultural institutions and copyright protection of content ownership</p>	<p>KPI 8.1 Participation in at least three (3) different standards organizations.</p> <p>KPI 8.2 At least five (5) input and output contributions to different standards organizations.</p> <p>KPI 8.3 SHIFT tools compliance to at least three (3) international accessibility standards.</p>
<p>QI 09</p>	<p>Project output indicators - Dissemination and communication strategies for wider-scale adoption of SHIFT results across cultural and creative industries</p>	<p>KPI 9.1 > 100 organizations to be contacted for raising awareness on SHIFT platform</p> <p>KPI 9.2 > 5 dedicated stakeholder events to be organized across EU and international shows.</p> <p>KPI 9.3 > 15% expected growth of stakeholder communities after the launch of the project.</p> <p>KPI 9.4 > 12 scientific papers to be published in peer-reviewed journals and conferences.</p> <p>KPI 9.5 > 3 demonstrations at co-located workshops and conferences.</p> <p>KPI 9.6 At least 3 joint reports published with interdisciplinary partnership of SHIFT consortium</p>

4.4. Quality assurance

For an effective communication among partners the following rules should be considered:

- Indexing the e-mails sent with [SHIFT] as subject.
- Coding the files in a similar manner.
- Following the quality guidelines presented in this document.



4.4.1. Coding deliverables

In the framework of SHIFT project, the document files are to be named as follows:

SHIFT_“DeliverableCode”_“DeliverableName”_version, where:

- “DeliverableCode” is the codification of the report/demonstrator, as defined in Annex I (Part A).
- “DeliverableName” is the name of the report/demonstrator, as defined in Annex I (Part A).
- Version is a number representing the version of the deliverable:
 - SHIFT_Deliverable-number_Name_v0.xx (intermediary versions).
 - SHIFT_Deliverable-number_Name_v1.0 (final version).

All project documents will use the SHIFT logo and the number of Grant Agreement, as reference.

4.4.2. Deliverable editing

The process of writing a deliverable starts early, when a task is launched within the project. The task leader kicks-off the activities and during roll-out is assisted by the WPL, Coordinator and ultimately by the Executive Board which is in charge with monitoring all work being done on each task. These duties include organizing technical meetings, either via telephone conference or F2F meetings, on which each partner presents the achievements since the previous meeting (or the objectives and scope in case it is the task kick-off meeting). The TL and WPL (and all other contributors if needed) will provide feedback on the results presented, in an attempt to align all partners’ work with the guidelines outlined on the Description of Action.

In the process of editing a report (deliverable) there are different roles suggested to be assigned to contributing partners by task leaders. It is important to plan it in advance, set up all sections and contributors properly and agree on the common line for all contributions. Clear responsibilities shall be assigned in order to avoid misunderstandings. On each deliverable, the following roles are always present:

Deliverable Contributor: All partners working on a task producing a deliverable are asked to contribute to the deliverable. The deliverable editor will allocate all requested contributions on separate sections, and section editors will ask for individual contributions. These contributions shall reflect



the results obtained due to the work of each partner on the task that is associated to the deliverable and include responsibilities like:

- Provides contributions to reports.
- Follows the request from the task leader, template (if any).
- Provides updates and/or clarifications if requested.
- Provides timely and meaningful contributions.

Section Editor: On Table of Content (ToC) creation, deliverable editors assign to a responsible person the editing responsibility for each section. Section editors are in charge of technical parts of a deliverable, on which they should coordinate and merge several individual inputs from partners. The role of a section editor is contacting all contributors, asking for the needed contribution and, upon receiving it, integrating it on the main body of that section. The goal is having someone in charge to play the role of a coherent merger of all pieces of information, so that they can be homogeneous and be aligned. When done, the section is delivered to the Deliverable editor for its integration on the main document.

The responsibilities of a Section Editor can be summarized as follows:

- Considering the complexity of the report, the task leader may assign editors for the main chapters.
- Consolidates the input received from partners.
- Drafts partial conclusions.

Deliverable Editor is the ultimate person responsible of the deliverable. The deliverable editor is in charge of providing the first ToC and section editor allocation, issuing reminders at all deliverable stages, calling for contributions and performing a complete review. Common sections such as the Executive Summary, Introduction and Conclusions are also handled by the document editor (aided by technical contributors if needed). He / she must ensure the coherence of references, tables, figures and all editorial aspects. On deliverable finalization, the editor must inform the PC and the Executive Board for the final approval.

Deliverable editors are usually the TL of the task and have the following responsibilities.

- Issues the table of content.
- Assigns responsibilities to partners.



- Provide templates for contributions.
- Check the contributions received from partners.
- Consolidates contributions.
- Drafts conclusions.

4.4.3. Deliverable timeline

The quality assurance process for SHIFT reports is detailed in Table 17 and includes the guidelines to submitting a deliverable. Thus, to comply with SHIFT quality guidelines editing the report should start with at least 10 weeks before the submission date. For weeks before due time the document should have all the sections filled and the review process should start.

Table 17. Recommended timeline to edit SHIFT reports

Action	What	Who	When
Definition of Editor	The deliverable editors as per DoA set a meeting with all contributing partners to kick-off the task and propose an approach	TL, Main editor of the report	Project start
Creation of TOC	Allocation of partners to TOC and Reviewers	Deliverable Editor	10 weeks before report submission
ToC Agreement	Feedback on ToC. Final agreement. Call for contributions	All contributing partners	9 weeks before report submission
1st submission	First contributions received from partners	Contributors	7 weeks before report submission
Draft ready for Internal review	First consolidated version of the deliverable to be reviewed internally	Deliverable and section editors	5 weeks before report submission
Overall Review finalization	Feedback provided to contributors. Contributors start to address reviewer comments	Deliverable reviewers	4 weeks before report submission



Draft ready for Quality review	Consolidated version from the WP to be reviewed by the Quality Manager	Deliverable and section editors	3 weeks before report submission
Quality review finalization	Feedback provided to contributors. Contributors start to address reviewer comments	Quality Manager	2 weeks before report submission
Final version for PC/STM approval	Finalization of the document and delivery to PC and the EB	Deliverable and section editors	1 week before report submission
Upload by PC	Delivery	PC	Deadline

4.4.4. Deliverable review

Overall reviewer is in charge of reading the whole document (or a part of it if the document is extensive), providing feedback on both editorial and technical aspects. This feedback is directed back to the deliverable editor (and then to section editors and contributors) so that he can address the requested changes. Whenever all changes are performed, a clean version of the new document is provided to deliverable reviewers so that they can approve the changes. Each WP outputting a deliverable is in charge of providing a document reviewed, at least, by one partner actively participating in the WP and not acting as editor of the document. The main purpose of this review is granting the needed proficiency in terms of technical content is provided, avoiding inconsistencies and/or bad reasoning.

The responsibilities of an overall reviewer are:

- Reads the whole document.
- Provides feedback on both editorial and technical aspects.
- Track changes and comments are used to guide the improvement of the report.
- Submits the document to the task leader.
- Check the implementation of suggestions.



Quality Assurance reviewer. Apart from the overall review, a second round review is set up to assure that the content is also understandable by potential readers with not deep technical knowledge on the object of the document. For this task members from the WPL Board (SIMAVI, SOMKL, FORTH, UAU, HERITAGE, QMUL) are assigned.

Among the responsibilities of a Quality reviewer, we may list:

- Checks the compliance with the project templates and structure.
- Checks for overlapping content.
- Check the ethical compliance.
- Check if the security level of the document is appropriate (Public, Consortium restricted, EU restricted, Confidential).

WPLs may internally redistribute the reviews in case they can reach an agreement. Additional volunteer reviews are also welcome and will be integrated in the process, in case any partner is particularly interested in one deliverable's content and is willing to contribute as reviewer.



5. RISK MANAGEMENT

This chapter presents a formal approach for managing risk in the project. Risk management is a core element and a fundamental requirement in the research domain. Various opportunities and risks exist in every project providing a complex and often inter-related mix that researches have to address.

ISO 31000 [ISO31] is a standard for risk management. First published in 2009, with the most current version (at the time of writing) being 2018, it describes a set of guidelines intended to streamline risk management for organizations.

So far, the ISO 31000 family consists of:

- ISO 31000:2018 (Principles and Guidelines on Implementation) [ISO31].
- ISO/IEC 31010:2009 (Risk Assessment Techniques) [IEC31].
- ISO Guide 73:2009 (Risk Management Vocabulary) [ISO73].

The overall structure and approach adopted by the 2018 edition of ISO 31000 is best illustrated by the diagram included in ISO 31000 and reproduced below as Figure 6. ISO 31000 states that managing risk is based on the principles, framework and process described in the guidelines. It also states that these principles and components might already exist in full or in part within an organisation, but they might need to be adapted or improved so that managing risk is efficient, effective and consistent [ISO31].



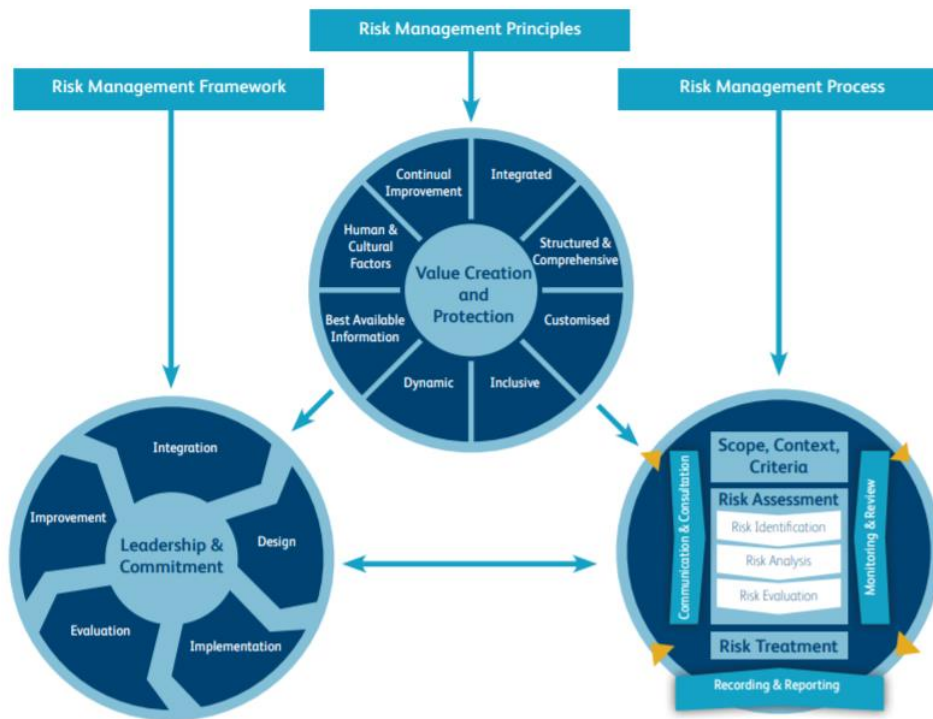


Figure 7. Principles, framework and risk management process from ISO 31000

Managing risk ensures that adverse events are avoided and/or their negative impact is minimized. The objective of the project Risk Management is to capture these possible events and provide a mechanism to control and mitigate them.

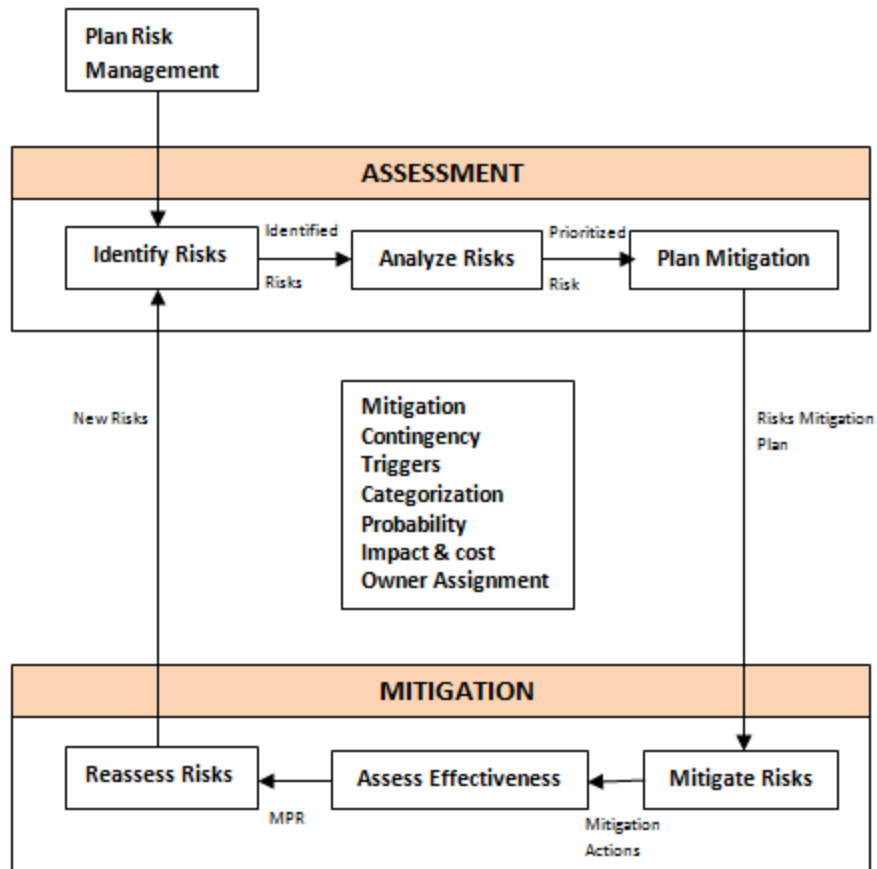


Figure 8. Risk Management process

5.1. Identify Risks

The purpose of Identify risks is to determine potential risk events and their characteristics that, if they occur, may have a positive or negative impact on the project objectives. This is a repeatable process because new risks may become known or risks may change as the project progresses through its life cycle.

The initial list of risks here presented in Description of Action – Part A is a start to this process. The project implementation plan, produced at the start of the project, is subject to revision in the course of the project, in accordance with the procedures for project re-planning outlined in this section.



As presented on DoA, a risk analysis is already conducted at project proposal stage, outputting Table 18, as a result. This table shows anticipated critical risks and agreed countermeasures.

Apart from the risks identified at the proposal stage, SHIFT WP leaders have also outlined some additional operational risks detected during this first ramp up phase.

Table 18. SHIFT critical risks & risk management strategy

Risk#	Description of risk	WP #	Proposed risk-mitigation measures
1	Breach of responsibility by a consortium partner, e.g., partner leaves consortium or does not deliver the proposed work. Likelihood: low; Severity: high	WP7	Early Development Stage: The consortium will use its large network of collaborators to identify a suitable replacement partner. Intermediate Stage: the project can still be carried out by the remaining partners by careful re-allocation of resources, as the partners have been strategically selected to complement in expertise.
2	Disputes over ownership of IPR amongst consortium partners. Likelihood: low; Severity: medium	WP7	Standard IPR and access rights clauses will be included in the Consortium Agreement, which will be signed before work starts to avoid future disputes. The consortium has agreed in the preparation phase that the developer of a result will be its sole owner. Envisaged joint results will be registered prior to their creation along with the agreed distribution of IPR among their owners.
3	The use case definition could result in use cases and scenarios which cannot be fully technically implemented. Likelihood: low; Severity: high	WP1	The use cases will be tailored to the technical possibilities of the technologies envisioned by the consortium. A feedback loop will ensure that use case definitions are realistic.



4	Functionalities do not meet the requirements of the target users and therefore the end solution cannot be accepted. Likelihood: medium; Severity: low	WP2, WP1, WP3, WP4	To avoid misspecification of functional requirements, the consortium places strong emphasis on a user-centric design approach within WP1, with extensive user-driven requirements analysis for ensuring that SHIFT technologies comply with the end-users' expectations.
5	Underestimated development time, problems coping with new technology, unacceptable performance by partners. Likelihood: medium; Severity: low	WP2, WP5, WP3, WP4	The Technical Manager and the Project Coordinator will monitor development progress, detect development problems early and proceed with corrective actions. They will reschedule and re-evaluate assigned MMs, towards delivering the platform on time
6	Pilot tools cannot be delivered on time. Likelihood: low; Severity: high	WP5	Vigilantly monitor SHIFT tools evolution, integration and take proper actions to make sure basic tool functionalities are in place for designers to test. Create smaller satellite demonstrators per each developed technology in the respective partner's lab to illustrate some of the building blocks of the research and arrange special demo sessions.
7	Out of the radar emerging competition could hinder commercialization. Likelihood: medium; Severity: high	WP6	Market intelligence activities will ensure continuous monitoring and analysis of the market and competition landscape (T6.4, T6.6). Market analysis and the exploitation plan will be updated to reduce the risk and new ways of exploitation will be evaluated.



8	Limited acceptance by the beneficiaries of the project results. Likelihood: medium; Severity: medium	WP7	Well defined user requirements & development of suitable business models/ roles and cost -benefit evaluation of the solutions / Technical Manager, Quality Manager and Project Coordinator will follow up these activities to ensure high quality and adaptation to user/ business needs.
9	COVID-19 outbreak prevents stakeholders' activities, restrictions to travel and of the field meetings. Likelihood: High; Risk: High	WP2, WP5, WP6, WP1, WP3, WP7, WP4	Due to COVID-19 uncertainty or other major global disturbances, the consortium will work on the identification of appropriate methodological alternatives that ensure that participatory and project activities are not brought to a complete standstill and the project can continue producing results. Digital tools have already been settled to work in cooperation with partners on remote. Even if for better cooperation, on the field workshops is preferable, the pilots can also be hold on remote.

5.2. Risk Monitoring and Control

The Risk Monitoring and Control process is an important part of the Project Execution. Thus, on the common repository for SHIFT project (on Microsoft SharePoint) an Excel file named **SHIFT Risk Management** includes the risk log alongside with the risk assessment.

As the Risk Register is a living document, it is important to record the date that risks are identified or modified.

The Consortium Project Coordinator could initiate separate meetings called "risk meetings" with the whole project team or only with one "risk owner", to evaluate the status of the risk, as well as the efficiency and effectiveness of the risk response strategy.

The frequency of Risk meetings depends on how the project progresses relative to its objectives. For instance, if an un-anticipated risk emerges



and/or its impact on objectives is different from what was initially expected, the planned response might not be considered adequate anymore. It will then be necessary to perform additional response planning to control the risk and the risk owner or the Consortium Project Coordinator will call for a meeting.

In the Project Execution phase, during the regular Status Meetings or Risk Meetings, the Consortium Project Coordinator and the team will analyse the risk register and perform the following steps:

- Determine whether project initial assumptions are still valid.
- Determine whether risks, as identified, have changed from their prior status.
- Determine whether new risks have been identified in the current phase of the project.

Updates considering the risk management will be include in the periodic reports.

6. MONITORING AND REPORTING PROCEDURES

This chapter summarizes the way SHIFT plans to schedule all needed actions so as to deliver the periodical reports for the project, scheduled at M12, M24 and M36. The idea is keeping the PMT updated every 6 months about the partner specific financial and technical achievements. This way, corrective actions could be performed prior to the agreed periodical review with the EC, assuring this way the minimization of deviations.

6.1. ECAS reporting information

SHIFT project has two reporting periods as per Grant Agreement:

- R1: starts in M1 and ends in M12.
- R2: starts in M13 and ends in M36.

At the end of every reporting period progress is assessed in a formal manner by the Project Officer. For this, the Consortium needs to submit a financial and a technical report. This process is followed by a Review Meeting were the progress and submitted reports are validated.

At the end of each reporting period, the EC opens a session in the online cost reporting tool (SyGMA) and the Financial Statement must be submitted electronically via the Participant Portal.



Each partner should:

- Fill in the on-line individual Financial Statement (including its third parties, if any) once receiving a notification from the Participant Portal.
 - Include an explanation of the use of resources and the information on subcontracting and in-kind contributions provided by third parties.
 - include a Person Month breakdown per Work Packages.
 - E-sign and submit their Financial Statements to the Coordinator. The signature must be done by the FSIGN.
- Coordinator should:
 - Submit the Periodic Report including all the information collected from partners.
 - One single submission is accepted.
 - The Periodic report must be submitted in 60 days after receiving the notice that is was opened.
 - Details and guidelines will be provided by SIMAVI as the reporting period approaches.
 - For the 1st period, the session is expected to be opened at the beginning of October 2023



Figure 9. ECAS reporting timeline

6.2. Reporting to the coordinator

As described in the Consortium Agreement, each partner should submit a 6-month report to the Coordinator with the progress of tasks (effort, timeline). The purpose of these reports (financial and technical) is to:

- Collect information for the Periodic reports.
- Help the Coordinator monitor the effort spent on tasks.

- Provide early warnings on deviations in terms of time, budget and activities.

The reports have simple structures and request only information that is absolutely necessary to elaborate the Periodic Reports and prepare the Review meetings.

6.3. Financial report

Together with the proposed Consortium Agreement every partner has received a detailed planning of the effort. The effort was distributed on every WP and task for 6-month periods.



WP/Task	Description	Overall		S1		S2		S3	
		Start	End	Plan	Real	Plan	Real	Plan	Real
WP1	SHIFT user requirements analysis for cultural heritage accessibility and inclusion	1	21						
T1.1	Stakeholder Requirements Study on Cultural Curation, Accessibility, Inclusion and Storytelling	1	21						
T1.2	Specification of SHIFT Components for Deployment Lifespan	3	12						
T1.3	SHIFT User Evaluation Guidelines and Acceptance Metrics	1	12						
T1.4	SHIFT Content Aggregation and Distribution Process from End-user Organisation to Technology Providers	3	12						
T1.5	Ethics and legal aspects regarding SHIFT end-user evaluation	1	12						
WP2	Computer vision toolkit for enhancing CH content appeal and social richness	3	30						
T2.1	Deep-learning architecture design and implementation for foreground/background object detection	3	30						
T2.2	Physics informed deep-learning network architecture	3	30						
T2.3	Generation of motion sequences for foreground objects using deep learning	3	30						
T2.4	Action sequence recognition within CH video repository	3	30						
WP3	Audio engineering framework and multi-modal stimuli transformation	3	30						
T3.1	Comprehensive textual representation of assets based on NLP approaches	3	30						
T3.2	Modelling Temporal Evolution of Language for Cultural Asset Curation	3	30						
T3.3	Text and video to speech production tool for the affective narration of cultural heritage assets	3	30						
T3.4	Haptic techniques for 3D digital asset perception	3	30						
T3.5	Accessible framework of inclusive museum exhibits for 3D digital asset perception	3	30						
WP4	Cross-modality curation of cultural content using inclusion by design	3	30						
T4.1	Cultural Asset Pre-processing and Feature Extraction for Media Curation	3	30						
T4.2	Multimedia Cultural Asset Curation Based on Association by Design	3	30						
T4.3	Distribution SHIFT Curation Repository for Cultural Assets	3	30						
T4.4	Digital Rights Management (DRM)	3	30						
WP5	SHIFT architecture design, integration, validation, and demonstration	3	36						
T5.1	End-to-end Platform Architecture, Specifications and Development lifecycle	3	12						
T5.2	Integration of the system components into the SHIFT platform	8	33						
T5.3	Functional Testing of end-to-end SHIFT platform	12	33						
T5.4	Pilots Set-up and User's Involvement	12	33						
T5.5	SHIFT Demonstrations	18	36						
WP6	Dissemination and exploitation	1	36						
T6.1	Communication, Dissemination Planning and Implementation	1	36						
T6.2	Dissemination Activities Targeting Stakeholder Markets	1	36						
T6.3	Training and knowledge transfer	10	34						
T6.4	Business Strategy and Market Validation	18	36						
T6.5	Monetization Strategy	24	36						
T6.6	Market Expansion and Impact	24	36						
WP7	Project coordination	1	36						
T7.1	Management of the Consortium	1	36						
T7.2	Financial Administration and Reporting	1	36						
T7.3	Project Quality Assurance	1	36						
T7.4	Intellectual Property Rights and Patents Management	1	36						
T7.5	Data management	1	36						
		PR							
	Number of Person*months								
	Direct Personnel costs								
	Travel and Subsistence								
	Equipment								
	Workshops/ events / dissemination (Open Access publications)								
	Other Specific Project costs (e.g audit)								
	Subcontracting								
	Third Parties								
	Purchase/other direct costs								
	TOTAL PERSONNEL COSTS								
	TOTAL OTHER DIRECT COSTS								
	TOTAL SUBCONTRACTING								
	TOTAL INDIRECT COSTS (OVERHEADS)								
	TOTAL COSTS								
	REQUESTED EC CONTRIBUTION								

Figure 10. Semester financial report template

The scope of this report is to:

- Support the Coordinator in issuing the payments based on progress.
- Check the progress of each partner.
- Avoid under- and over-spending.
- Support the Coordinator in providing statistics to the EC considering the financial progress (part of the periodic reports to be submitted in ECAS).



6.4. Technical report

The technical progress report has a simple structure and checks the progress of tasks. This type of report was proposed as an alternative to collecting all timesheets from partners. This report collects information about the activities performed by each partner and feeds the periodic reports to be submitted in ECAS.

Dissemination activities will be added to this report structure.

WP	Task	Work done during period
WP1	T1.1	
	T1.2	
	T1.3	
	T1.4 -Y1	
	T1.4 -Y2	
WP2	T1.5	
	T2.1 -Y1	
	T2.1 -Y2	
	T2.1 -Y3	
	T2.2 -Y1	
	T2.2 -Y2	
	T2.2 -Y3	
	T2.3 -Y1	
	T2.3 -Y2	
	T2.3 -Y3	
	T2.4 -Y1	
T2.4 -Y2		
T2.4 -Y3		

Figure 11. Semester technical report template

A structure for the deliverables was also proposed. One deliverable should be prepared following the structure below:

- Executive summary – publishable content
- Explanation of the work carried out and overview of the progress.



- Impact.
- Update of the plan for exploitation and dissemination of result (if applicable).
- Update of the data management plan (if applicable).
- Follow-up of recommendations and comments from previous review(s) (if applicable).
- Exploitation primarily in non-associated third countries (if applicable).
- Open science.
- Deviations from annex 1 and annex 2 (if applicable - Tasks/objectives and Use of resources (Effort summary, Financial part explanation).
- References.
- List of tables, figures, acronyms.



INDEX

EXECUTIVE SUMMARY3

INDEX.....5

1. EXPLANATION OF THE WORK CARRIED OUT AND OVERVIEW OF THE PROGRESS8

1.1 SHIFT OBJECTIVES.....8

1.2 Explanation of the work carried out per WP.....12

1.2.1 WORK PACKAGE 1: SHIFT user requirements analysis for Cultural Heritage accessibility and inclusion.....12

1.2.2 WORK PACKAGE 2: Tools for authoring augmented hypermedia and gesture recognition for enriched accessibility.....29

1.2.3 WORK PACKAGE 3: Audio engineering framework and multi-modal stimuli transformation.....35

1.2.4 WORK PACKAGE 4: Cross-modality curation of cultural content using inclusion by design48

1.2.5 WORK PACKAGE 5: SHIFT architecture design, integration, validation, and demonstration56

1.2.6 WORK PACKAGE 6: Dissemination and exploitation.....69

1.2.7 WORK PACKAGE 7: Project coordination101

2. Impact104

3. Update of the plan for exploitation and dissemination of result (if applicable).....107

4. Update of the data management plan (if applicable)107

5. Follow-up of recommendations and comments from previous review(s) (if applicable).....107

6. Exploitation primarily in non-associated third countries (if applicable).....107

7. Open science.....107

8. Deviations from annex 1 and annex 2 (if applicable)108

8.1 Tasks/objectives108

8.2 Use of resources109

8.2.1. Effort summary109

8.2.2. Financial part explanation.....112

8.2.3. Unforeseen subcontracting (if applicable).....117

8.2.4. Unforeseen use of in kind contributions.....118

9. References.....118

Figure 12. Structure of SHIFT report

6.5. Change Management

Change Management is the process responsible for controlling the lifecycle of all changes. Change Management procedures apply to all types of change requests, for example to the work plan, controlling, up to risk management. Such requests may arise due to changes in the processing or data environment, changes of user requirements, or general logistics problems.



Change requests can be raised by either party (EC or the SHIFT Consortium) and addressed to the other party.

If during project implementation, SHIFT Consortium or EC raise the need of a change within the time, functionalities, price or expenses, the SHIFT Consortium can request and recommend at any moment such changes and propose an amendment to the project or to the functional specifications, according to the official procedure of Change Management.

In order to avoid potential delays, which may affect the project integrity, approval or rejection of requests must be made as quickly as possible.

The change request can be issued by either party (the issuer). All types of change request must follow the procedure described below.

EC and SHIFT Consortium will discuss all proposed changes and these discussions will have as a result one of the following options:

- Agreement on the change (approve or reject as out-of-scope)
- Classification and prioritisation of the approved changes
- Recommendation for changing from the SHIFT Consortium.

The SHIFT Consortium will perform an initial analysis of the requested change. This step will be performed in a period agreed by the Executive Board.

The results of the analysis will refer to:

- The time already passed from the implementation of the change, the date when the SHIFT Consortium can begin to work and the impact on the deadlines of the project.
- Identification of the documents/software and any other work products which are going to be affected by the change.
- Details about the cost, involving time and resources specifications.

If the change request involves costs, an addendum to contract will be made. The above procedures may be iterative, with each party able to request amendments to the original change request. All such amendments must be documented in the change request.



7. CONCLUSION

D7.1 Project Handbook represents the reference point for SHIFT partners regarding workflow organization and monitoring procedures.

The document contains the detailed analysis of the work plan, including the task breakdown and analysis.

An emphasis has been placed on describing all management procedures, governance and communication inside SHIFT. The way all outcomes of the project are going to be prepared, stored, reviewed and delivered is also presented all along this document.

In addition, some items that will be described in detail later on, such as quality control and risk assessment procedures are included here in an attempt to provide the overall management view of SHIFT.

The document is a living document, and may be updated with new version numbers, to reflect changes like: change of persons and responsibilities or amendments of the document based on recent management experiences, or tool modifications.



8. REFERENCES

- [AGA22] European Commission (2022) Annotated Model Grant Agreement, https://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/amga/h2020-amga_en.pdf
- [SHA19] SharePoint Online Collaboration Tool, <https://www.microsoft.com/en-us/microsoft365/sharepoint/collaboration>
- [CAG22] SHIFT Consortium (2022), Consortium Agreement, October 2022
- [DES19] European Commission, DESCA - Horizon 2020 Model Consortium Agreement, Http://Www.Desca-2020.Eu/Fileadmin/Content/Desca_2020_1.2/Desca2020_V1.2_March_2016_With_Elucidations.Pdf
- [GAG22] SHIFT Consortium (2022), HORIZON Grant Agreement 101060660, 1st of June 2022
- [GDP16] European Union, (2016) Regulation (EU) 2016/679 (General Data Protection Regulation) in the current version of the OJ L 119, 04.05.2016; cor. OJ L 127, 23.5.2018
- [IEC31] IEC/FDIS 31010 (2009) Risk management — Risk assessment techniques
- [IEC13] ISO-IEC-IEEE 29119 – Software and system engineering – Software testing
- [IEE08] IEEE 829 – 2008 – IEEE Standard for Software Test Documentation
- [ISO18] ISO 9001:2015, Quality management systems — Requirements
- [ISO31] ISO 3100, (2018) Guidance on project management, Reference number ISO 3100:2018(E)
- [ISO73] ISO Guide 73:2009 – Risk Management – Vocabulary
- [KOM22] SHIFT Consortium (2022), Kick-off-Meeting Minutes



Annex 1 – list of deliverables

WP No	Del Rel. No	Del No	Title	Lead Beneficiary	Type	Dissemination Level	Est. Del. Date (annex I)
WP1	D1.1	D1	SHIFT requirements, user evaluation guidelines and acceptance metrics	12- DBSV	R – Document, report	PU - Public	31.03.2023
WP1	D1.2	D2	SHIFT deployment lifespan roadmap, content aggregation and distribution process	6 - SOMKL	R – Document, report	PU - Public	30.09.2023
WP1	D1.3	D3	SHIFT end-user ethics and legal framework	11 - ERC	R – Document, report	PU - Public	30.09.2023
WP1	D1.4	D4	SHIFT requirements, user evaluation guidelines and acceptance metrics - final version	12- DBSV	R – Document, report	PU - Public	31.06.2024
WP2	D2.1	D5	Automatic generation of motion sequences from pictorial repositories	13 - QMUL	OTHER	SEN - Sensitive	31.12.2023
WP2	D2.2	D6	Automatic generation of motion sequences from pictorial repositories - final version	13 - QMUL	OTHER	SEN - Sensitive	31.03.2025
WP3	D3.1	D7	Tool for the textual representation of CH assets	5-UAU	OTHER	SEN - Sensitive	30.09.2023
WP3	D3.2	D8	Text and video to affective speech synthesis	4 - audeERING	OTHER	SEN - Sensitive	31.12.2023
WP3	D3.3	D9	Haptic based interaction with CH assets' digital twins	2 - FORTH	OTHER	SEN - Sensitive	31.12.2023
WP3	D3.4	D10	Accessible framework of inclusive museum exhibits for 3D digital asset perception	2 - FORTH	OTHER	SEN - Sensitive	31.03.2025
WP3	D3.5	D11	Tool for the textual representation of CH assets - final version	5-UAU	OTHER	SEN - Sensitive	31.03.2025
WP3	D3.6	D12	Text and video to affective speech synthesis - final version	4 - audeERING	OTHER	SEN - Sensitive	31.03.2025
WP3	D3.7	D13	Haptic based interaction with CH assets' digital twins - final version	2 - FORTH	OTHER	SEN - Sensitive	31.03.2025



WP4	D4.1	D14	Tools for Cultural Asset Curation and features extraction	5-UAU	OTHER	SEN - Sensitive	31.12.2023
WP4	D4.2	D15	Distribution SHIFT Curation Repository for Cultural Assets with DRM capabilities	13 - QMUL	OTHER	PU - Public	31.03.2025
WP4	D4.3	D16	Tools for Cultural Asset Curation and features extraction - final version	5-UAU	OTHER	SEN - Sensitive	31.03.2025
WP5	D5.1	D17	SHIFT architecture	1 - SIMAVI	R – Document, report	PU - Public	30.09.2023
WP5	D5.2	D18	Integration and functional testing	1 - SIMAVI	OTHER	SEN - Sensitive	31.05.2024
WP5	D5.3	D19	Pilots evaluation strategy and plan	11 - ERC	R – Document, report	PU - Public	30.09.2024
WP5	D5.4	D20	Pilots final report	8 - SMB	R – Document, report	PU - Public	30.09.2025
WP5	D5.5	D21	Integration and functional testing - final version	1 - SIMAVI	OTHER	SEN - Sensitive	30.06.2025
WP6	D6.1	D22	Communication, Dissemination & Impact - first version	7 - ANBPR	R – Document, report	PU - Public	31.03.2023
WP6	D6.2	D23	Market analysis, business models, commercial sustainability and knowledge transfer - first version	10 - HERITAGE	R – Document, report	PU - Public	31.03.2023
WP6	D6.3	D24	Communication, Dissemination & Impact - intermediary version	7 - ANBPR	R – Document, report	PU - Public	30.09.2024
WP6	D6.4	D25	Market analysis, business models, commercial sustainability and knowledge transfer - intermediary version	10 - HERITAGE	R – Document, report	PU - Public	31.03.2024
WP6	D6.5	D26	Communication, Dissemination & Impact - final version	7 - ANBPR	R – Document, report	PU - Public	30.09.2025
WP6	D6.6	D27	Market analysis, business models, commercial sustainability and knowledge transfer - final version	10 - HERITAGE	R – Document, report	PU - Public	30.09.2025
WP6	D6.7	D28	Policy Brief	10 - HERITAGE	R – Document, report	PU - Public	30.09.2023



WP6	D6.8	D29	Policy Brief - final version	10 - HERITAGE	R – Document, report	PU - Public	30.09.2025
WP7	D7.1	D30	Project handbook	1 - SIMAVI	R – Document, report	PU - Public	31.12.2022
WP7	D7.2	D31	IPR Management	1 - SIMAVI	R – Document, report	PU - Public	30.09.2025
WP7	D7.3	D32	Data Management Plan & Ethical compliance	11 - ERC	R – Document, report	PU - Public	31.03.2023
WP7	D7.4	D33	Data Management Plan & Ethical compliance - final version	11 - ERC	R – Document, report	PU - Public	30.09.2025
WP7	D7.5	D34	Progress Report	1 - SIMAVI	R – Document, report	PU - Public	30.09.2024



The Members of the SHIFT Consortium:

Organizations	Country	Role
SIMAVI - SOFTWARE IMAGINATION & VISION	Romania	Coordinator
FORTH - IDRYMA TECHNOLOGIAS KAI EREVNAS	Greece	Partner
MDS - MASSIVE DYNAMIC SWEDEN AB	Sweden	Partner
AUD - audEERING GmbH	Germany	Partner
UAU - UNIVERSITAET AUGSBURG	Germany	Partner
SOMKL - MAGYAR NEMZETI MÚZEUM – SEMMELWEIS ORVOSTÖRTÉNETI MÚZEUM	Hungary	Partner
ANBPR - THE NATIONAL ASSOCIATION OF LIBRARIANS AND PUBLIC LIBRARIES IN ROMANIA	Romania	Partner
SPK - STIFTUNG PREUSSISCHER KULTURBESITZ	Germany	Partner
BMN - THE BALKAN MUSEUM NETWORK	Bosnia and Herzegovina	Partner
HERITAGE - HERITAGE MANAGEMENT	Greece	Partner
ERC - ETICAS RESEARCH AND CONSULTING	Spain	Partner
DBSV - GERMAN FEDERATION OF THE BLIND AND PARTIALLY SIGHTED	Germany	Partner
QMUL - QUEEN MARY UNIVERSITY OF LONDON	United Kingdom	Associated Partner

Contact:

Project Coordinator: Purcarea Razvan	razvan.purcarea@simavi.ro
SIMAVI - SOFTWARE IMAGINATION & VISION	

Disclaimer:

Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or REA. Neither the European Union nor the granting authority can be held responsible for them.