



CODECO

Cognitive Decentralised
Edge Cloud Orchestration

D1: Project Handbook and Gender-neutral Guidelines

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Reviewer 2	Xiaoming Fu, UGOE



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Executive Summary

The CODECO Deliverable D1, *Project Handbook and Gender-Neutral Guidelines*, serves as the project's operational manual, outlining solutions and processes to support project organization and daily activities. It provides essential information on project management, including specific rules and procedures.

CODECO D1 also details quality monitoring aspects, establishing procedures to ensure effective project execution. It defines the mechanisms and structures necessary for management and administrative coordination, emphasizing governance, change management, communication strategies, project stages, milestones, and reporting roles and responsibilities.

D1 is a dynamic working tool that can be refined throughout the project's lifecycle to enhance collaboration among partners and support the development of a unified work methodology.

D1 version 1.0 was released in M3 of the project. A revision of D1, version 1.1, has been provided in M12 due to the change of internal repository from NextCloud to MS Teams. A final version of D1 has been released in M27 of CODECO, providing the latest updates in terms of procedures, disclaimers, logos to be used, etc.

Keywords: Handbook, project management, quality control.

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v1.3	10.01.2024	Final revision and public release	FOR, Rute C. Sofia
V1.4	05.03.2025	Revision of D1 concerning new adopted procedures, disclaimers, etc.	FOR, Rute C. Sofia

Disclaimer

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List of Acronyms

Acronym	Meaning
AB	Advisory Board
CA	Consortium Agreement
DoA	Description of Action
Dx	Deliverable, where x corresponds to the deliverable identification number, e.g., D1
EB	Executive Board
EC	European Commission
ECAS	European Commission Authentication Service
GA	Grant Agreement
GeA	General Assembly
HE	Horizon Europe
KoM	Kick-off Meeting
KPI	Key Performance Indicator
M	Month
MSx	Project Milestone, where x defines the identifier of the milestone
PC	Project Coordinator (FOR)
PM	Person Months
PPR	Period Performance Reports
PO	Project Officer
SERI	Swiss State Secretariat for Education, Research and Innovation
TL	Task Leader
ToC	Table of Contents
WP	Work Package
WPL	Work Package Leader
WPS	Work Package Structure



Acknowledgements

Acknowledgements to all Partners, for the contributions and revisions of the deliverable.



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1 Introduction

Deliverable D1 of CODECO serves as a central reference for the processes, tools, and overall framework needed to effectively monitor and support daily operations and project activities. It also streamlines the project coordinator's role in managing and overseeing CODECO's activities.

CODECO D1, referred to as **CODECO Handbook**, defines the following aspects:

- Supports the Grant Agreement (GA) and the Consortium Agreement (CA) in terms of definition of roles and responsibilities for the daily project operations.
- Gives insight into the tooling and rules concerning information archival, including aspects related with the project intranet.
- Provides communication rules concerning mailings, meetings, conference calls.
- Provides rules for usage of templates and document naming.
- Provides rules for the development and review of deliverables, scientific publications, and overall expected project outcome.
- Defines guidelines to integrate gender neutral rules across all work developed.
- Demonstrates how the project will be carried out, measured, monitored, accounted for, and safeguarded.

1.1 Document Structure

The deliverable comprises the following sections:

- **Section 1** introduces the document, including scope, structure, and dependencies, i.e., companion deliverables.
- **Section 2** provides information concerning the project objectives, assets, and work plan.
- **Section 3** explains the overall strategy and approach concerning the management structure, partner roles and responsibilities, procedures for management and quality monitoring, milestones, and key indicators.
- **Section 4** describes the CODECO management aspects, including governance and management structure, ethics handling, and daily management procedures.
- **Section 5** covers the assessment process for potential deviations in terms of schedule, resources, cost, and quality.
- **Section 6** covers the handling of changes in the project.
- **Section 7** provides a summary for the overall communication management, and processes for quality monitoring in terms of communication activities.

- **Section 8** provides dissemination guidelines to support the outcome of the project.
- **Section 9** covers reporting aspects in the project, such as documentation formats, deliverable submission processes, and internal assessment of the deliverables' quality.
- **Section 10** explains processes to handle reporting on costs and effort.
- **Section 11** focuses on the explanation of the gender-neutral approach followed in CODECO for the generated outcome, and daily operation.
- **Section 12** provides guidelines concerning ethical and security assessment aspects in the project.
- **Section 13** concludes the deliverable.
- **Annex I** show the format of the main document templates adopted in CODECO.

1.2 Dependencies

D1, as the handbook of the project, provides initial guidelines that assist the daily operation of the project in a transparent, coherent, and quality-wise way. Relevant deliverables that relate with D1 are:

- D2 – Data Management and Ethics Handling v1.0, M3.
- D5 – Risk Assessment and Management Plan, M3.
- D21 – Dissemination, Communication, Promotion Plan, M3.

2 CODECO Context

The overall aim of CODECO is to contribute to a smoother and more flexible support of services across the Edge-Cloud continuum via the creation of a novel, cognitive Edge-Cloud management framework. CODECO will implement software toolkits suitable for a smarter management of highly distributed environments based on heterogeneous networks and integrating mobile, resource-constrained devices. The CODECO components, first described in deliverable “D9 – *CODECO Technological Guidelines, Reference Architecture and Initial Open-source Ecosystem Design*”, M6, and ultimately provided in deliverable “D10 – *CODECO Technological Guidelines, Reference Architecture and Initial Open-source Ecosystem Design*”, M18, extends management and orchestration of Edge-Cloud services with cognitive cross-layer adaptability and with features that allow for intelligent decisions about computational offloading and network adaptation, while taking into consideration application requirements, networking requirements, data security and sensitivity, as well as other context specific aspects related with the data flow, that may emerge.

In the core of the CODECO vision for a cognitive, decentralised Edge-Cloud orchestration framework, are three main Edge-Cloud continuum challenges, as illustrated in Figure 1: large-scale dense environments involving high portable applications and mobile devices, across the far Edge to the Cloud.



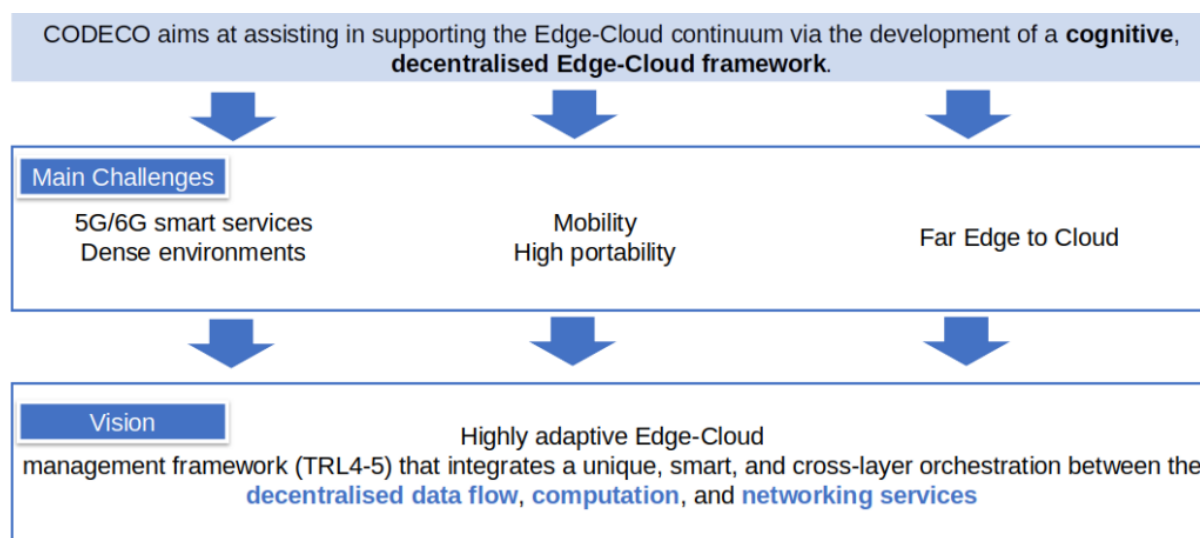


Figure 1: The CODECO vision and answer to challenges.

To achieve this aim, CODECO proposes a unique, smart, and cross-layer orchestration between the decentralised data flow, computation, and networking services, to address Edge-Cloud challenges derived from the rising Internet and IoT service decentralisation.

CODECO shall develop an ecosystem consisting of open-source toolkits, large-scale experimentation, training tools and events, use-cases across 3 vertical domains (Smart Cities, Energy, Manufacturing), multiple events integrated into a unique Innovation and Research Community Engagement Programme.

The CODECO consortium comprises a total of 16 partners across Europe and its associated states Israel and Switzerland. The consortium partners represent several types of organizations, ranging from SMEs with a focus on open-source software and innovation management (INOVA+, Eclipse Foundation, Almende); renowned universities (University of Göttingen, Universidad Politecnica de Madrid, University of Pireus Research Center) and research institutes (fortiss, I2CAT, ATHENA); large companies (ATOS, Telefonica, Siemens, Intracom-Telecom, RedHat, Netsoft-Intrasoft, IBM).

2.1 Objectives

The specific objectives of CODECO, defined in the GA Annex 1, *Description of the Action (DoA)*, are summarized in Figure 2 and presented next.






	Simplification & Automation	O1: Reduce Edge-Cloud Setup and Management Time
	Data-compute-network Orchestration	O2: Optimize Edge-Cloud Operation via a privacy-preserving data-compute-network orchestration
	Security & Privacy Preservation	O3: Provide automated, privacy preserving secure management for multi-clusters
	Openness & Greenness	O4: Support multi-domain Edge Cloud operations integrating openness and greenness
	Broad Impact	O5: Build a consolidated ecosystem appealing to the different CODECO stakeholder groups

Figure 2: Summary of CODECO objectives.

- **O1: to reduce the Edge-Cloud setup and management time via an automated, cognitive framework.** CODECO provides a novel concept for automated management, integrating DevOps, business requirements, and the service requirements. This new concept, integrated into the component Automated Configuration Manager (ACM) shall simplify both the setup and runtime management across multi-cluster multi-domain environments based on the de facto container orchestrator Kubernetes (K8s). CODECO automates the required configuration, e.g., config map, databases, secrets, access control lists, performs vulnerability detection (e.g., through applying anomaly detection mechanism) and ignites corrective actions.
- **O2: to optimize Edge-Cloud operations via a privacy-preserving data-compute-network orchestration.** During service runtime, the CODECO cognitive framework shall provide a unique approach to the optimization and personalization of the overall Edge-Cloud operation by addressing management and orchestration based on a holistic approach that combines data orchestration (Meta-data Manager, MDM), service and application orchestration (ACM and Scheduling and Workload Migration, SWM), network service orchestration and adaptation based on ML (Network Management and Adaptation, NetMA). The cognitive core considers decentralised/split learning and context-awareness (Context-awareness and Hybrid Federated Learning, PDLC). This holistic approach allows a cross-layer adaptation of the infrastructure required to run applications in real-time, creating the least disturbance to services, and with full transparency to users.
- **O3: to provide automated, privacy-preserving, and secure management of multi-cluster, multi-domain environments.** The CODECO components provide support for automated behaviour (during Edge-Cloud setup and runtime) assuming Edges that are limited to one domain (single cluster operation) or Edge-Cloud environments and services running across multiple domains (multi-domain, multi-cluster operation). CODECO handles cluster setup, discovery and provides a decentralised approach to handle functions and to support interconnections across multi-domain scenarios, assuming scenarios involving mobility, trusted and non-trusted environments). The automated behaviour considers also aspects related to workload migration and management of data flows across federations of clusters.
- **O4: to support multi-domain Edge-Cloud operations integrating openness and greenness.** The CODECO framework shall be deployed in different phases and offered during the project runtime as open-source software via GitHub provided by partner ECL (CODECO Eclipse Research GitLab) and shall be applied to the proposed CODECO use-cases across at least 3 key European domains (Smart Cities, Energy, Manufacturing) with realistic environments, such as the city of Göttingen. CODECO shall also have as result an experimentation framework, currently envisioned to be made available to the research community via EdgeNet or via a similar open platform.
- **O5: to build a consolidated ecosystem, appealing to the different CODECO stakeholders' groups.** CODECO plans to raise awareness to its mechanisms both via broad dissemination and scientific outreach; via the deployment of its different use-cases, and integration of results in an open way (Eclipse CODECO GitLab, EdgeNet). Furthermore, CODECO defines a “*Research and Innovation Programme*” to assist in the use of assets via SMEs, research entities, and academia.

2.2 Assets

To achieve the proposed vision, CODECO contributes with the assets illustrated in Figure 3 and summarized next:

- **A1: Open, cognitive toolkits and smart Apps**, integrating the elastic and advanced concepts to manage, in a smart and flexible way, containerized applications across Edge and Cloud (dynamic cluster and multi-cluster environment).
- **A2: A developer-oriented open-source software repository**, to be available in an early stage of the project, thus allowing for early exploitation of initial, advanced results and a better adaptation throughout the project lifetime.
- **A3: Training tools and events**, to support the development of services based on the CODECO framework.
- **A4: 6 Use-cases across 4 domains (Smart Cities, Energy, Manufacturing, Smart Buildings)**, to be deployed in operational environments.
- **A5: Research and Innovation Community Engagement Programme**, based on the different use-cases and including the different CODECO stakeholders.
- **A6: CODECO framework integration into the large-scale EdgeNet¹**, experimental infrastructure, to assist in the building of experimentation and novel concepts by the research community.



Figure 3: The main CODECO assets.

¹ <https://edge-net.org/>

3 CODECO Workplan Overview

The work plan of CODECO comprises seven work packages (WPs) for a project lifespan of three years, being their interactions represented in the CODECO Pert in Figure 4. A summary of effort and start-end of each WP is provided in Table 1. **WP1** is focused on project coordination and management, ensures adequate internal communication, quality and timely delivery of results, mitigation of risks, fulfilment of contractual responsibilities to

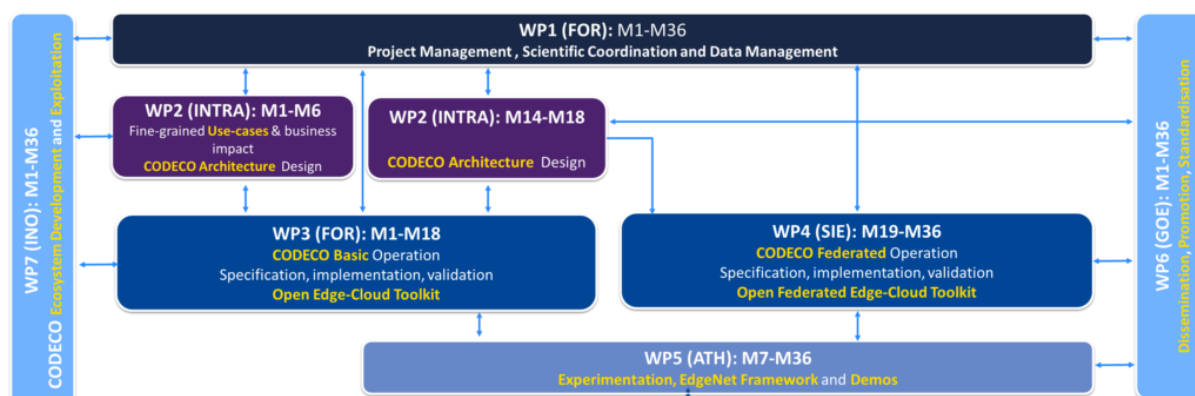


Figure 4: CODECO Pert Chart.

the EC, liaison with the Advisory Board (AB) members, sound management of its data and of open science. **WP2** addresses boundaries, initial use-case design and provides guidelines to the use-cases. It also supports the CODECO architecture design. **WP3** addresses the specification, implementation of the CODECO framework and its components, creating the first CODECO Open Edge-Cloud Software Toolkit. **WP4** supports the tasks to be added to the holistic, cognitive Edge-Cloud CODECO framework assuming multi-cluster, multi-domain environments. **WP5** supports the experimentation and demonstrations based on the CODECO use-cases and shall provide the CODECO EdgeNet framework. **WP6** covers plans and effective impact creation activities to disseminate and promote results towards all CODECO stakeholders, towards standardisation, and towards the broader European Edge-Cloud community. **WP7** (CODECO Ecosystem Development and Exploitation) supports the CODECO community building activities and its exploitation during its lifetime and beyond.

Table 1: CODECO Work packages.

WP	Title	Lead	PMs	Start	End
WP1	Project Management, Scientific Coordination, Data Management	FOR	54	1	36
WP2	Use-cases, Open-source Ecosystem and Architectural Design	INTRA	66	1	12
WP3	CODECO Basic Operation and Open Toolkit	FOR	201.5	1	18
WP4	CODECO Federated Operation and Open Toolkit	SIE	141	19	36
WP5	Experimentation Framework, Demonstrations, and AI Governance and Resilience Testing	ATH	109.5	7	36
WP6	Dissemination, Promotion and Standardisation	UGOE	86	1	36
WP7	CODECO Ecosystem Development and Exploitation	INO	66	1	36

3.1 Milestones

Project milestones are presented in Annex 1 of the Grant Agreement, in the DoA. To assist partners, a file (.xls) holding the milestones is also provided in the intranet of CODECO and can be found in the MS Team CODECO, General channel, [01-Admin/Part A](#). Milestones are presented in Table 2.

Table 2: CODECO milestones.

Nr	Name	Lead	WP	Due (M)	Due	Means of verification
M1	Initial Use-case design and business models	INO	2	6	30.06.2023	D8 (D2.1)
M2	CODECO intermediate architecture	FOR	2	6	30.06.2023	D9 (D2.2)
M3	CODECO architecture	FOR	2	18	30.06.2024	D9 (D2.2)
M4	CODECO Basic Operation Toolkit	ICOM	3	18	30.06.2024	Software releases and deliverables D11 (D3.1) and D12 (D3.2)
M5	CODECO Federated Operation Toolkit	ICOM	4	36	31.12.2025	Software releases and final versions of deliverables D13 (D4.1), D14 (D4.2) and D15 (D4.3)
M6	Intermediate Use-cases	ATH	5	20	30.08.2024	CODECO intermediate use-cases
M7	Full use-cases, Lab experiments, EdgeNet integration and validation	ATH	5	36	31.12.2025	CODECO Use-cases; CODECO in EdgeNet; Deliverables D17, D18 (D5.3, D5.4)
M8	Inception event: industrial workshop	FOR	6	12	31.12.2023	CODECO industrial workshop report, videos
M9	Development event I – CODECO workshop	ATH	6	24	31.12.2024	CODECO workshop proceedings
M10	Development event II – Dagstuhl seminar	UGOE	6	24	31.12.2024	Dagstuhl seminar proceedings
M11	Show-case event and demos	FOR	6	36	31.12.2025	CODECO final show-case and use-cases, Deliverables D21-D23 (D6.1-D6.3)
M12	Innovation and Community Engagement Programme I	INO	7	26	28.02.2024	Innovation and Community Engagement Programme reports, Website, D25 (D7.2)
M13	Innovation and Community Engagement Programme II	INO	7	36	31.12.2025	Innovation and Community Engagement Programme reports, Website, D26 (D7.3)
M14	Exploitation during project and beyond	INTRA	7	36	31.12.2025	Deliverables D27, D28 (D7.4-D7.5)
M15	CODECO ecosystem beyond lifetime	FOR	7	36	31.12.2025	Deliverables D29, D30 (D7.6, 7.7)

3.2 Deliverables

Project deliverables are presented in Annex 1 of the Grant Agreement, in the DoA, and an xls is also provided in the intranet of CODECO to Partners, in MS Team CODECO, General channel, [01-Admin/CODECO_PartA](#). To further assist Partners, Table 3 provides the deliverables. The numbering of the deliverables is provided in the first column, while the second column provides an internal numbering, to facilitate the link to the proposal.

Deliverables follow HE categorization, where **R** stands for report; **DEM** stands for demonstrator, pilot, prototype; **DEC** stands for Website, IPR filling, press and media, videos; **DATA** corresponds to datasets; **DMP** corresponds to Data Management Plan; **OTHER** stands for any other type of result, e.g., software, technical diagram, algorithm, model. Moreover, deliverables have different types of sensitivity, and their release is categorized in four levels:

- **PU**: Public Usage. No restrictions on access (in secured PDF format).
- **SEN**: Sensitive, limited under the conditions of the GA.
- **CON**: Confidential, only for members of the consortium (including the EC).

Table 3: CODECO deliverables.

Nr	Inr	Title	WP	Lead	Type	D	Due	Due	Rev1	Rev2
D1	D1.1	Project Handbook and Gender-Neutral Guidelines	WP1	FOR	R/DEC	PU	M3	31. Mar. 2023	INO	UGOE
D2	D1.2	Data Management and Ethics Handling v1.0	WP1	INO	R	PU	M3	31. Mar. 2023	FOR	INTRA
D3	D1.3	Data Management and Ethics Handling v2.0	WP1	INO	R	PU	M18	30. Jun. 2024	FOR	SIE
D4	D1.4	Data Management and Ethics Handling v3.0	WP1	INO	R	PU	M36	31. Dec. 2025	FOR	ICOM
D5	D1.5	Risk Assessment and Management Plan	WP1	FOR	R	SEN	M3	31. Mar. 2023	INO	ATOS
D6	D1.6	Risk Assessment and Management Intermediate Report	WP1	FOR	R	SEN	M18	30. Jun. 2024	INO	UPM
D7	D1.7	Risk Assessment and Management Final Report	WP1	FOR	R	SEN	M36	31. Dec. 2025	INO	TID
D8	D2.1	Fine-grained Use-case Design and Business Impact	WP2	INO	R	PU	M6	30. Jun. 2023	INTRA	FOR
D9	D2.2	CODECO Technological Guidelines, Reference Architecture, and Initial Open-source Ecosystem Design intermediate version	WP2	FOR	R/DATA	PU	M6	30. Jun. 2023	i2CAT	INTRA
D10	D2.3	CODECO Technological Guidelines,	WP2	FOR	R/DATA	PU	M18	30. Jun. 2024	IBM	INTRA

Nr	Inr	Title	WP	Lead	Type	D	Due	Due	Rev1	Rev2
		Reference Architecture, and Initial Open-source Ecosystem Design								
D11	D3.1	CODECO Basic Operation components and Toolkit v1.0	WP3	ICOM	R/OTHE R	PU	M9	30. Sep. 2023	FOR	RHT
D12	D3.2	CODECO Basic Operation components and Toolkit v2.0	WP3	ICOM	R/OTHE R	PU	M18	30. Jun. 2024	FOR	ECL
D13	D4.1	CODECO Federated Operation and Toolkit v1.0	WP4	ICOM	R/OTHE R	PU	M27	31. Mar. 2025	FOR	SIE
D14	D4.2	CODECO Federated Operation and Toolkit v2.0	WP4	ICOM	R/OTHE R	PU	M36	31. Dec. 2025	FOR	ATH
D15	D5.1	AI Governance and Resilience Aspects in CODECO v1.0	WP5	FOR	R	PU	M18	30. Jun. 2024	I2CAT	ALM
D16	D5.2	AI Governance and Resilience Aspects in CODECO v2.0	WP5	FOR	R	PU	M36	31. Dec. 2025	I2CAT	ATOS
D17	D5.3	CODECO EdgeNet Framework v1.0	WP5	ATH	R/OTHE R/DEM/ DATA	PU	M24	31. Dec. 2024	FOR	ICOM
D18	D5.4	CODECO EdgeNet Framework v2.0	WP5	ATH	R/OTHE R/DEM/ DATA	PU	M36	31. Dec. 2025	FOR	SIE
D19	D5.5	Use-case Deployment and Demonstrations v1.0	WP5	INTR A	R/OTHE R/DEM/ DATA	PU	M24	31. Dec. 2024	ICOM	SIE
D20	D5.6	Use-case Deployment and Demonstrations v2.0	WP5	INTR A	R/OTHE R/DEM/ DATA	PU	M36	31. Dec. 2025	ATH	IBM
D21	D6.1	Dissemination, Communication, Promotion Plan	WP6	INO	R	PU	M3	31. Mar. 2023	GOE	FOR
D22	D6.2	Dissemination, Promotion, Scientific Outreach and Standardisation Report v1.0	WP6	GOE	R	PU	M18	30. Jun. 2024	INO	IBM
D23	D6.2	Dissemination, Promotion, Scientific Outreach and Standardisation Report v2.0	WP6	GOE	R	PU	M36	31. Dec. 2025	UPM	i2CAT
D24	D7.1	CODECO ecosystem community building report v1.0	WP7	ECL	R/DEC	PU	M12	31. Dec. 2023	ICOM	RHT
D25	D7.2	CODECO ecosystem community building	WP7	ECL	R/DEC	PU	M24	31. Dec. 2024	ICOM	FOR

Nr	Inr	Title	WP	Lead	Type	D	Due	Due	Rev1	Rev2
D26	D7.3	report v2.0 CODECO ecosystem community building report v3.0	WP7	ECL	R/DEC	PU	M36	31. Dec. 2025	FOR	INO
D27	D7.4	CODECO Innovation and Research Community Engagement Programme intermediate version	WP7	INO	R	PU	M18	30. Jun. 2024	ALM	SIE
D28	D7.5	CODECO Innovation and Research Community Engagement Programme Final version	WP7	INO	R	PU	M36	31. Dec. 2025	TID	SIE
D29	D7.6	Lifetime Exploitation Activities	WP7	INTR A	R	PU	M26	28. Feb. 2025	IBM	FOR
D30	D7.7	Broad Exploitation Report	WP7	ALM	R	PU	M36	31. Dec. 2025	INO	FOR

4 CODECO Management Aspects

4.1 Governance and Management Structure

Overall, project management encompasses operational, technical, financial, and administrative co-ordination as well as the supervision of various activities within the project.

4.1.1 Main Bodies

The CODECO management structure comprises several governance bodies as defined in the GA and CA: the *Executive Board (EB)*, *General Assembly (GeA)*, the *Advisory Board (AB)* – as illustrated in Figure 5 and as defined in the Consortium Agreement. Furthermore, to allow for a transparent and fair daily management, CODECO includes in its governance structure all partners.



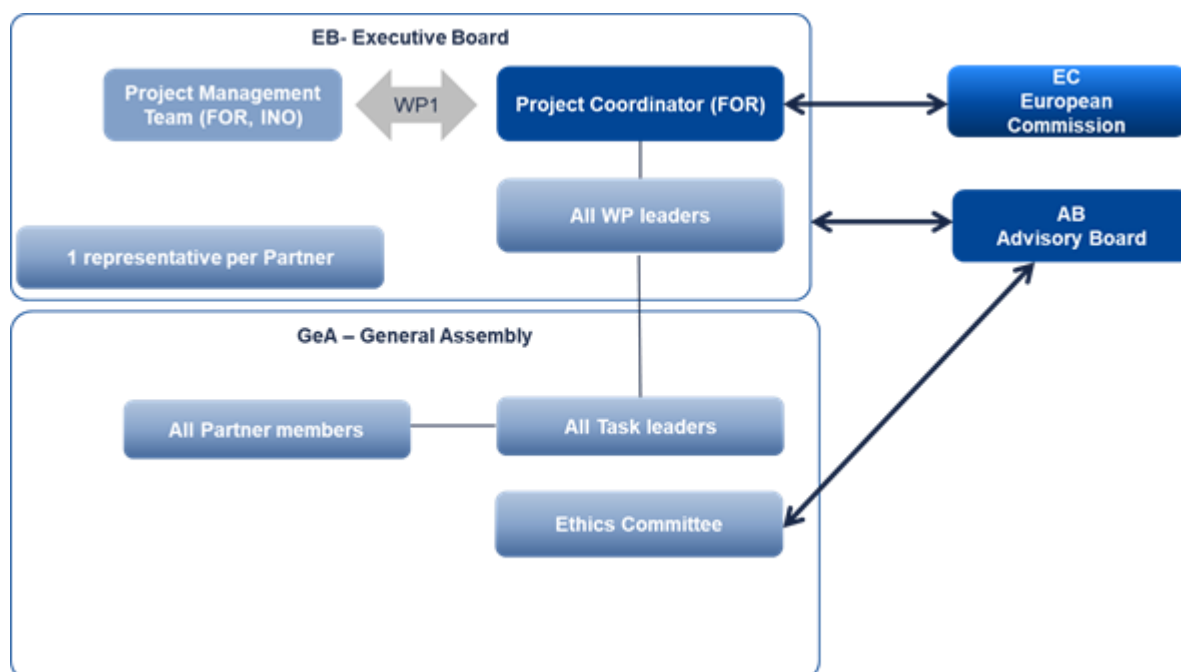


Figure 5: CODECO bodies and governance structure.

The **Executive Board (EB)** consists of the Project Coordinator (PC), the WP leaders, and one representative per partner not leading a WP, to ensure that all partners are represented in the EB, as provided in Table 4. The EB is chaired by the PC and assists the PC regarding the daily operations of the project, allowing for a faster communication and agreement, but does not vote any decisions. The EB therefore assists the PC in creating a coherent and technical view across the project; assessing risks and evaluating the progress; keeping the project quality; and revising plans when required. The EB handles the external liaisons to the project (AB) and proposes measures to the GeA. **The EB does not have voting functions.**

Table 4: The CODECO Executive Board members in 2025.

Name	Affiliation	WP led
Rute C Sofia	FOR	WP1, WP3, WP4, and PC
Ana Solange/Pedro Monteiro	INO	WP7
Francesco D'Andria	ATOS	-
Vasileios Theodorou	ICOM	-
Vassilis Tsaooussidis	ATH	WP5
Xiaoming Fu	UGOE	WP6
Jürgen Gesswein	SIE	WP4
Dorine Matzakou/ John Soldatos	INTRA	WP2
Marco Jahn	ECL	-
Rizkallah Touma	I2CAT	-
Dimosthenis KYRIAZIS	UPRC	-
Luis M. Contreras	TID	-
David Jimenez	UPM	-
Andries Stam	ALM	-
Josh Salomon	RHT	-
Luis Garces-Erice	IBM	-

Within the EB, a specific team has been created in WP1 between FOR (Project Coordinator, T1.2, PC) and INO (internal project manager; T1.1), to assist a smooth, transparent, daily management of the operations. The articulation of the two teams is handled by the WP1 leader (PC, FOR), and the members of the internal project management team are provided in Table 4. This team assists the project management internal daily operations; ensures quality and transparency in terms of internal daily administrative and financial duties, being responsible for the project progress reporting and financial aspects. Thus, processes such as collecting, checking, consolidating cost reports and expenses from partners; checking payments, responding to any relevant request in terms of project management and financial aspects are tasks of this sub-team of the EB. The key roles in the EB are:

- **PC**, responsible for the overall management, communication, and coordination to the EC; permanent contact point to the partners and WP leaders; responding to any requests, analysing risks, ensuring an adequate quality level (being supported by the EB).
- Project Management team
- **PC financial manager**, responsible for the overall financial aspects of the project; ensuring an adequate communication of financial aspects to the EC and to partners.
- **Internal project manager** (as a member of the project management team), is in constant alignment with the PC elements and with CODECO partners, being responsible for the internal timely collection of the required partner information to develop progress reports.
- **WP leaders** oversee the coordination of the work at a WP level, ensuring that the proposed technical objectives and deadlines of the work package are met.

Table 5: The CODECO EB project management team in 2025.

Name	Affiliation	WP lead
Rute C Sofia	FOR	PC
Thomas Strauß	FOR	PC financial manager – external resources, financial reporting, and management
Ana Solange Leal	INO	Internal project manager
Pedro Monteiro	INO	Internal project manager
Vera Alves	INO	Internal project manager (financial matters)

The **General Assembly (GeA)**, defined in the GA and CA, consists of all partners. **The GeA is the sole body handling voting of decisions.** The GeA comprises therefore all Task leaders as well. Within the partners, an *Ethics Committee (ETC)* consisting of three members is to be elected until M3 to support the analysis of the proposed activities regarding data management and ethics assessment support. The ETC will report to the GeA findings on each plenary meeting, and on extraordinary meetings, if required.

The Advisory Board (AB) currently comprises seven experts. The AB provides a vision on the different CODECO Stakeholders' groups. The main objective of the AB is to advise the consortium on the requirements and architecture to consider and correct direction of

research and development activities to ensure that the outcomes of the project are valuable and will have impact and market uptake. The international experts are:

- **Prof. Dr. Roch Guérin**, Department Chair and Harold B. and Adelaide G. Welge Professor in the department of Computer Science and Engineering at Washington University in St. Louis. Provides support concerning the overall architectural design in particular far Edge integration.
- **Prof. Dr. Yuanyuan Yang**, Distinguished Professor at the Department of Electrical and Computer Engineering, and Associate Dean for Diversity and Academic Affairs College of Engineering and Applied Sciences, Stony Brook University, USA, providing support concerning the overall architectural design and decentralized systems.
- **Prof. Dr. Y. Richard Yang**, Professor of Computer Science and Electrical Engineering and Director of Undergraduate Studies for Computer Science, Computer Science and Mathematics, and Computer Science and Psychology, Department of Computer Science, Computer Systems Lab at Yale University, USA, who shall provide support towards the compute-network and network-application integration aspects of CODECO.
- **Dr. Nicolas Schneider**, Expert in Artificial Intelligence Decision-Making and Combinatorial Optimization, providing support and advising the CODECO applications towards new frontiers in aeronautics.
- **Dr Maria João Barros-Weiss**, Head of Digital Ecosystems at IONOS, Germany providing support towards standardisation and business models.
- **Dr. Timur Friedman**, Associate Professor, LIP6, France, providing the support towards EdgeNet integration.
- **Dr Charles Sheridan**, Chief Data and AI officer at Nemetschek Group, Ireland, supporting the business impact for multi-cluster multi-cloud industrial environments. The AB shall be extended with two more members.

4.1.2 Governance Structure

WP leaders (WPLs) and *Task leaders (TLs)* have been assigned during the proposal at a level of partner and then revised during the kick-off at an individual level per partner. WP leaders and Task leaders are responsible for co-ordinating efforts at a WPs and Task level, respectively.

Reporting on the successful completion of tasks, progress on deliverables, and on problems, delays and conflicts and proposals for decision making start from the partners involved at the Task level and escalate up to the final decision body, the EB, and then if required to the PC. As already stated, the EB mediates aspects but does not vote. Situations that cannot be mediated will have to go to the GeA, following the methods proposed in the CA.

In addition to these governance roles, the following management and quality the roles are considered in CODECO:

- **Deliverable Leader (DL)**, a partner (represented by one or more persons) responsible for the editing of a deliverable, as defined in section 3.2. DLs are responsible for the quality and timely production of the deliverables, planning and coordinating the deliverable production, following the project guidelines (rf. To section 9, Project Reporting Aspects). They are also responsible for the content of the



deliverable, including its veracity, transparency, quality, technical integrity. DLs report the progress to WPLs.

- **Internal reviewers.** Each deliverable has been assigned **two internal reviewers** agreed by the Partners and listed in section 3.2. The DL is the sole responsible for revising the deliverable in accordance with the internal reviewers' requests.

4.2 Ethics Handling

CODECO relies on aspects that relate with AI and handles datasets, and therefore, ethical aspects will arise about data privacy, potential for infringement of human rights, personal data collection and misuse of technologies developed.

Data management and Ethics handling is defined by the CODECO Deliverable D2 – Data Management and Ethics Handling (DME M3, INO). The EB, together with an internal Ethics Committee (ETC), will follow the processes as proposed in DME and ensure that partners follow the proposed rules, making sure that they conform to the legislation regulations in force in the countries where the research will be carried out, as well as to the EC Ethical Legislation.

Regarding data collection, storage, protection, retention, and destruction, it is hereby confirmed that these activities will be rigorously implemented in compliance of the privacy and data collection rules and regulations as they are applied nationally and, in the EU, as well as with the HE rules. **The rules for Data Management are described in the CODECO deliverable D2.**

4.3 Management Procedures

The governance and management structure described in section 4.1 ensures the proper and quality-wise implementation of CODECO. Decisions shall be taken in accordance with the GA and its Annexes, following the proposed structure in case of escalation.

During the project, the Partners shall have the need to solve different views in terms of technical aspects, often having to reach an agreement that may not suit all. Agreements and resolution aspects can be first handled at an informal contact level, followed by official verification measures (in accordance with the GA), e.g., e-mails, letters, minutes of meetings. Technical issues/conflicts within the given contractual commitments that do not involve alterations in the Grant Agreement (DoA), in budget and in the overall focus will be initially handled on the Work Package basis.

In the event of a project conflict among partners, a second intervention level will be done at the EB (regarding daily management aspects). Only if no consensus is feasible, then the intervention will escalate to the GeA following the CA proposed methods. Any issues that cannot be set amicably will be set in accordance with the relevant provisions of the Consortium Agreement.

5 Project Deviation Assessment

To assist the quality assessment of CODECO, several tools have been set as baseline, to allow in understanding how the project is deviating from the proposed plan. Deviations shall be considered from a perspective of time, resources, costs, and quality.



5.1 Time Deviation Assessment

The CODECO Gantt provided in the GA and available in the MS Teams CODECO General channel, [01-Admin/Part-A](#), provides the basis for the timeline of the project.

TLs and WPLs are responsible for the timely reporting of time deviations and respective justification, following the rules of the project. Therefore, if a task is delayed, or there is a foreseen delay, the TL must report to the WPL in a timely manner, allowing for the WPL to propose measures or to propose escalation to the EB.

To assist Partners in keeping milestones and deliverables deadlines in mind, the project counts with a common calendar in its intranet, where WPLs, TLs, and EB can add events, milestones, and deadlines.

5.2 Resource Deviation Assessment

The project counts with a reporting tool (in the MS Teams CODECO, [01-Admin/ReportingTools/EffortsCosts](#)), where Partners register individually the proposed planning until the end of the project, per task/WP, and per month. In the first eighteen months of the project, the management project team internally checks consumed, alerting partners in case of deviations, and requesting justifications. For the second reporting period (June 2024 until December 2025) the management team will do a check every six months.

Partners are responsible for the timely submission of their planned and consumed resources in relation to tasks where the partner has assigned PMs.

5.3 Cost Deviation Assessment

Cost deviations relate with the budget proposed by the Partner as stated in:

- Annex 2 of the GA (Estimated Budget for the Action).
- Effort allocation, as stated in Annex 1 of the GA.
- Resources, as stated in Annex 1 of the GA (rf. Also to section 5.2).

Deviations are assessed via the CODECO reporting tool, xls available in the CODECO MS Teams, General Channel, [01-Admin/ReportingTools/EffortCosts](#), respective partner folder, and where the partner registers periodically (every 3 months at least) expenses, used PMs, and respective aggregated costs of PMs per WP.

The Project Management Team considers as starting point for the budget of each partner Annex 2 of the GA.

5.4 Quality Deviation Assessment

Quality shall be monitored regarding the proposed KPIs of the project, defined in Table 6 for technical aspects, and in Table 7 for the overall CODECO ecosystem impact (dissemination, communication, engagement), as is described in the GA, Annex 1 (DoA). Each table provides the description of the proposed KPIs per objective, summarizing values to be assessed on specific months of the project.

The project will be measured against the proposed KPIs for specific timeframes:

- The two reviews planned by the EC.
- On each plenary meeting (once per quartal).

The results of the assessment will be part of the plenary minutes, eventually deriving requests for action and risks. They will also be part of the progress reporting to the EC.

Table 6: CODECO technical KPIs per objective.

Nr	KPI nr	KPI description	Assessment
O1	1.1	Time taken to setup and to configure multiple services based on 1 cluster across Edge-Cloud	Measurements for 1 service, involving 5 Edges to Cloud (M18); 10-20 services across 20 Edge-Cloud deployments (M24); 50-100 services across 50 Edge-Cloud deployments (M36)
	1.2	Percentage of manual intervention required against Kubernetes when setting up a cluster across Edge-Cloud	Measurements for 1 service, involving 5 Edges to Cloud (M18); 10-20 services across 20 Edge-Cloud deployments (M24); 50-100 services across 50 Edge-Cloud deployments (M36)
O2	2.1	Accuracy	Experimentation in EdgeNet and labs (M12, M24); large-scale evaluation derived from variability e.g., adding new nodes; increasing mobility in the participants in the system (M36).
	2.2	Latency	Measurements against a Cloud-based approach for 1 application, an Edge-Cloud based on 2 containers (M12); Use-cases dimensioning, involving at least 3 containers on the Edge and 1 on the Cloud (M24, M36), and 10 data sources; explore the increase in latency against the increase in data sources, containers on Cloud-Edge (M36).
O3	3.1	Time to setup and to configure federated clusters	Measurements involving 3 clusters (M24); 10 clusters (M36); Extrapolation derived from experiments in a large-scale platform (e.g., EdgeNet) (M36).
	3.2	Level of manual intervention	2 clusters (M24); 10 clusters (M30); 50 clusters (M36); extrapolation derived from experiments in large-scale platforms such as EdgeNet (M36).
O4	4.1	Deployment in realistic infrastructures	Each use-case integrating at least 10 CODECO nodes across 1 cluster (M18); across at least 3 clusters (M36)
	4.2	Number of external entities deploying CODECO	Measurement in events: at least 20 (M18); at least 50 (M36)
	4.3	Number of developers interested in CODECO	At least 20 (M18); at least 50 (M36)
O5	5.1	Number of liaisons to stakeholder groups	At least 5 (M12); at least 10 (M18); At least 20 (M36)
	5.2	Number of entities interested in CODECO	At least 10 (M18); At least 20 (M36)
	5.3	Number of integrated Edge nodes in EdgeNet	At least 1 (M18); at least 5 (M36)
	5.4	Number of entities addressing the open calls	At least 20 (M18); At least 50 (M36)
	5.5	Number of entities using CODECO after the open calls	At least 5 (M18); At least 20 (M36)

Table 7: CODECO Ecosystem Actions Impact Assessment, KPIs and verification measures.

Action	Target	KPI (M36)	Lead	Verification
Project Brochure	Disseminate the project broadly	>100 per year	FOR	WP6, website, digital and printed material
Project Website	Dissemination and aggregator of all results, FOR	>500 visitors per year	FOR, INO, UGOE	WP6 deliverables, website, press releases, presentations
Press releases	Dissemination about the overall project development, results, and events	4 per year (multiple partners) reaching to over 500 end-users	All	Digital material, printed material, WP6 deliverables
Media dissemination	Dissemination about the overall project development via broad media, e.g., TV, podcasts, public magazines, and journals	1 per year	All	Videos, YouTube (FOR), blogs, etc.
Social networks	Dissemination and interaction with the target stakeholders	> 200 followers on Twitter and LinkedIn	INO	Groups in social networks
Industrial Event	1 Inception event, industrial workshop (M12) Organised by <u>FOR</u> having as main target industrial stakeholders and aiming at igniting interest in further exploring the use-cases in multiple fields of IoT/Edge.	>50 participants	FOR	Proceedings of the event; registered participants list; survey.
Development Events	2 scientific events, a Dagstuhl seminar (<u>UGOE</u>) in year 2 and a scientific workshop (<u>ATH</u>) co-located with a top conference from ACM/IEEE/IFIP communities.	>50 participants	UGOE and ATH	Proceedings of the events; registered list of participants; surveys.
Show-case Event	A final show-case 1-day workshop, to be held in M34, jointly organised by <u>INO</u> and <u>FOR</u> , and aiming at show-casing the results to all target groups.	>70 participants	INO and FOR	Videos, Proceedings of the events; registered list of participants; surveys.
Standardisation events	2 standardisation events to be held in year 2 and year 3, jointly organised by <u>IBM</u> and <u>FOR</u> , aiming at discussing the standardisation contributions of CODECO, together with other initiatives, e.g., Gaia-X, CSA	2 events, >50 participants	IBM, FOR	Proceedings of the events; registered list of participants; surveys.

Action	Target	KPI (M36)	Lead	Verification
Scientific publications	EU-IoT, AIOTI. Regular submission of results in national, European, and international venues ¹ . CODECO shall target top venues, in particular IEEE, ACM and IFIP. CODECO shall also target European targets, such as EuCNC, CONASENSE. Publications will be made in open-science form, with papers being submitted in pre-print servers and relevant data on open repositories.	>40 peer-review, open access scientific papers	All	Scientific publications, WP6 deliverables
Representation in external events.	Regularly disseminate CODECO results in different venues, industrial and scientific.	>50 events	All	WP6 deliverables
Advanced training	Transfer results and address potential gaps derived from interaction with the scientific community. Specific events and participation in community events, e.g., summer schools, Webinars, workshops.	>20 organized training events with at least 50 participants	All research Partners	Proceedings of the events; registered list of participants; surveys.
Representation in Committees	CODECO will actively participate in conferences closely related to CODECO across ACM, IEEE, IFIP. Several of the consortium members have been continuous contributors to these conference series, including as general-, program-, workshops.	>20 committees per year.	All partners	Pages of the events; WP6 deliverables
Demonstrations	Project partners will also actively participate in demo sessions held at major conferences, workshops, and standardization meetings (e.g., IETF, 3GPP, ETSI MEC ISG, 5GAA, Networld2020 meeting) to show-case the results of CODECO, provide tutorials, demos, etc..	At least 3 demonstrations per year, starting on year 2.	Use-case partners	WP5 deliverables, press releases, videos, flyers.
SDO liaison and monitoring	Based on T6.3, assist the wider impact of CODECO via concrete contributions to SDOs (event organization, white papers, standards).	>10 contributions	All partners	Contributions to standards (WP6 deliverables)
Exploitation	2 internal events shall be	>20 participants	INO,	Proceedings of

Action	Target	KPI (M36)	Lead	Verification
workshops	organised to address exploitation aspects in year 2 and year 3 (WP7). These events shall be dedicated to discussion on exploitation aspects, being organised by the WP7 task leaders (INO, ECL, ALM), and shall involve the CODECO AB as well as eventual external stakeholders.	per event, 2 events	ECL, ALM	the events; registered list of participants; surveys.
Hackathon/Demo Camp	1 demo camp/Hackathon, to be jointly organized by ECL and INO in the context of the exploitation activities and community building (WP7), by M24. Rf. to T7.1	>70 participants	INO	Proceedings of the events; registered list of participants; surveys.

6 Change Management Handling

During the project lifetime, changes are expected to occur, thus requiring a set of processes that can assist in accommodating such changes in a way that does not endanger the project operation and results.

6.1 Categories of Changes

All Partners can request changes to CODECO, in accordance with the GA and CA procedures.

CODECO considers various categories of changes, and addresses such based on specific procedures:

- **Scheduling changes** relate with deviations towards the proposed project schedule (rf. To section 5.1), e.g., delays in deliverables.
- **Budget changes** relate with deviations from the approved budget, without impacting the overall project budget. This category of changes relates, for instance, with individual partner budget changes requests (e.g., requesting additional funding on one rubric, derived from underspending on another); and inter-partner changes (e.g., a partner requests for an affiliated entity to be added).
- **Scope changes** relate with potential deviations from the original technical plan, e.g., due to lack of equipment, or an unforeseen risk. These changes will be reported and assessed also during risk management (WP1, T1.2).
- **Quality changes** relate with the quality of the proposed outcome, e.g., deliverables, events. These changes may require the need of modification of KPIs.

Any change needs to be reported in a timely reported, following the governance structure described in section 4, from Partner to TLs; from TLs to WPLs; from WPLs to the EB and to the PC. The PC will ensure that any approved changes are adequately communicated, via the GeA, to all Partners, and adequately framed in changes to the GA, and in the review reports.

Changes that do not require changes to the GA or CA shall be debated via the EB. The EB reviews all change requests; determines the impact in terms of risk, scope, cost, schedule, and assists the PC in filtering change requests.

Change requests therefore need to be rated at distinct levels (TL; WPL; EB). The change requests and their level of importance in terms of project impact will be logged in MS Teams, General Channel, [01-Admin/OfficialDocs/Amendments](#).

For internal changes not requiring changes to the GA nor CA, the EB must vote unanimously.

For changes affecting the GA and/or CA, thus requiring amendments, the PC will consult the PO and initiate a proposal for amendment, which requires voting via the GeA. If more information is required for a change, then the request will be deferred and sent back to the Partner performing the request for further information and clarification. Extraordinary GeA meetings will be set by the PC, if required, to approve amendments.

6.2 Roles

The roles of different entities regarding Change requests are provided in Table 8.

Table 8: Roles of different entities during Change request processes.

Entity	Actions	Responsibilities
PC	<ul style="list-style-type: none"> • Logs received or generated change request. • Conducts preliminary cost, schedule, scope analysis of change prior to EB meetings. • Seeks clarification from change requestors on any open issues or concerns. • Makes documentation revisions/edits as necessary for all approved changes. • Coordinates the EB meeting. • Plans, controls, and monitors the implementation of approved change requests 	Authority
PC financial manager	<ul style="list-style-type: none"> • Conducts preliminary risk and quality analysis if change prior to EB meetings. • Makes documentation revisions/edits as necessary for all approved changes. • Participates on EB meeting. • Plans the implementation of approved change requests 	
WPL, TL	<ul style="list-style-type: none"> • Receive and/or generate, filter all change requests from consortium members and inform the EB and the PC. • Conduct preliminary cost, schedule, scope analysis of change prior to an EB meeting. • Seek clarification from change requestors on any open issues or concerns. • Makes documentation revisions/edits as necessary for all approved changes. • Participate on the EB meeting. • Plan the implementation of approved change requests 	Assign priority (i.e., emergency or not) and level of impact (i.e., high, medium, low) on each change request
Partners	<ul style="list-style-type: none"> • Submit all change requests through the project hierarchy. • Provide all applicable information and detail. • Be prepared to address questions regarding any submitted change requests. • Provide feedback as necessary on impact of proposed changes. • Implements and tests approved Changes 	

Entity	Actions	Responsibilities
EB	<ul style="list-style-type: none"> Reviews and prioritises all the Change Requests Accepts or rejects internal changes. Proposes, if required, for the PC to address the changes to the GeA 	Approves internal changes; proposes external change requests to be sent to the GeA
GeA	<ul style="list-style-type: none"> Reviews and prioritises the Change Requests Accepts or rejects internal changes. Proposes, if required, for the PC to address the changes to the GeA 	

6.3 Procedures

Table 9 provides a summary of the steps taken when a change is detected, or there is the need to consider changes.

Table 9: Change requests procedures in CODECO.

Step	Description	Requester	Responder	Period	Status
1	Identification of the need for a change – Change requester will submit a change request via E-mail up the project hierarchy. The E-mail should contain at minimum the following information: <ul style="list-style-type: none"> Description of the cause of the request Description of the change requested. Description of the suggested solution 	WPL, TL, PMO	Next level		Initiated
2	Conducts a preliminary analysis on the impact of the change; seeks clarification from team members and the change requestor. The assigned team members (EB, WPL, TL) will determine its priority (i.e., Emergency or Standard) and impact (i.e., Critical, Significant, Standard) and forward to the PC along with a decision to continue to discuss the request or not.	EB, WPL, TL	EB, PC	Within 1 week from the E-mail	Log 1
3	EB discusses the proposed change and decides whether to approve the change request based on the proposed information; whether it is an internal change or requires GeA voting.	EB	EB	Next meeting (extraordinary if required)	Log 2
4	If a change requires an amendment, the PC will trigger the process, contacting the PO	PC	PO	Within 1 week from the EB meeting	Log 3
5	If a change requires an amendment, the PC triggers an extraordinary GeA	PC	GeA	Within 1 week from	Log 4

Step	Description	Requester	Responder	Period	Status
	meeting and triggers the DoA and GA/CA changes.			the EB meeting	

6.4 Evaluation Criteria

The Change requests will be evaluated and logged based on the criteria described in Table 10.

Table 10: Change request evaluation criteria.

Type	Priority	Description
Priority	1 – Emergency	The change request is time critical, and an accelerated authorization and planning is required – EB extraordinary meeting to be triggered within 1 week.
	2 – Standard	The change request can wait until the next scheduled EB meeting.
	3 - Low	The change request can be discussed via E-mail.
Impact	Critical	Presents an extraordinarily high risk which will impact the delivery of the project and/or may require a GA amendment.
	Significant	It requires a management decision at the level of the EB and may have broader impact for the project.
	Low	It is presented to the EB reasons only. The matter is routine and can be resolved at the WP level.

7 Communication Management

This section explains guidelines for the communication handling between the CODECO Partners, towards the external bodies and towards the EC. This management plan sets the guidelines for the work to be developed across the project and specifically in WP6.

The PC, the WP6 leader UGOE, and the WP6 task leaders (UGOE, INO and ECL) take a central and proactive role in assisting all partners in reaching an effective communication and dissemination of CODECO activities.

The key aspects can be summarised as follows:

- Processes to assist the regular exchange of information; internal and operational aspects; technical documentation developed during the project.
- Processes to handle urgent exchanges (via E-mail, signalled as URGENT).
- Processes to support Web conferencing communication, and asynchronous communication across the project.

7.1 Communication Tools

CODECO profits from several tools that have been set to support both external and internal communication.



7.1.1 External Communication

The key tools for the external communication of the project are:

- Project Website (<https://he-codeco.eu>).
- Zenodo CODECO community (<https://zenodo.org/communities/he-codeco>) linked to the Website, and where all generated reports, papers, books are curated and kept.
- Social networks:
 - LinkedIn: <https://www.linkedin.com/company/91025267/>
- YouTube: <https://www.youtube.com/@CODECOProject>

The consortium has decided to opt out of X by the end of 2024.

In addition, all Partners are expected to contribute with high quality presentations and digital material / news items, announcements for publication in the online presence means. For this purpose, the PC and the WP6 WPL and TLs will create different templates to assist the Partners.

These efforts will be pursued throughout the project to raise awareness, ensure high visibility of the project results and objectives, and establish the grounds for knowledge transfer and proper support of the project activities.

7.1.2 Internal Communication

The key tools to assist the internal project communication are:

- **E-mail**, for all official communication. Specific mailing-lists (rf. To section 7.1.2.1) have been set in M1 of the project to assist the project by FOR. The description and members of the lists are available in the project internal repository, under [01-Admin/CODECO Contacts](#). A global mailing-list reaches all partners; mailing-lists have been also set to handle the legal aspects; WP work; AB and EB work. Mailing-lists are revised every quartal.
- The **CODECO repository** is based on MS Teams, hosted in Germany and managed by FOR. The CODECO serves as basis to all activities; minutes of meetings; etc. A specific area can be set for access by external bodies, e.g., EC or AB.
- **MS Teams**. A channel has been created per WP; and, for the AB and the EB. The general channel includes all members in CODECO.
- MS Teams (Web conferencing) to support the plenary meetings, EB meetings, etc, provided by FOR.
- Other web conferencing tools to support WP and Task meetings, provided by the different WPs and TLs.

The project holds four plenary meetings each year (1 per quartal), 2 physical and 2 Web conferencing as follows:

- Q1, physical meeting.
- Q2, Web conferencing.



- Q3, physical meeting.
- Q4, Web conferencing.

The physical meetings are hosted in turns by partners, and planned timely, usually in Q1 of each year. EB regular meetings and AB meetings are aligned with the plenary meetings.

Additional workshops or meetings will be held as required by the work plan and the needs identified by the project. In case of special conditions that do not allow the organisation of physical meetings, online meetings will be planned instead properly.

7.1.3 Internal Repository, Calendar, Activity Management

The CODECO internal repository is supported via MS Teams and maintained by FOR. Requests for addition of members is handled via the **he-codeco-it** mailing-list.

The internal repository (rf. To Figure 6) provides support for the development of work, development of minutes for meetings, etc. **It is linked to the General channel of the MS Team CODECO**, thus allowing access to all involved. The repository integrates different tools, such as file storing and sharing; calendar for the whole project; document management; note taking.

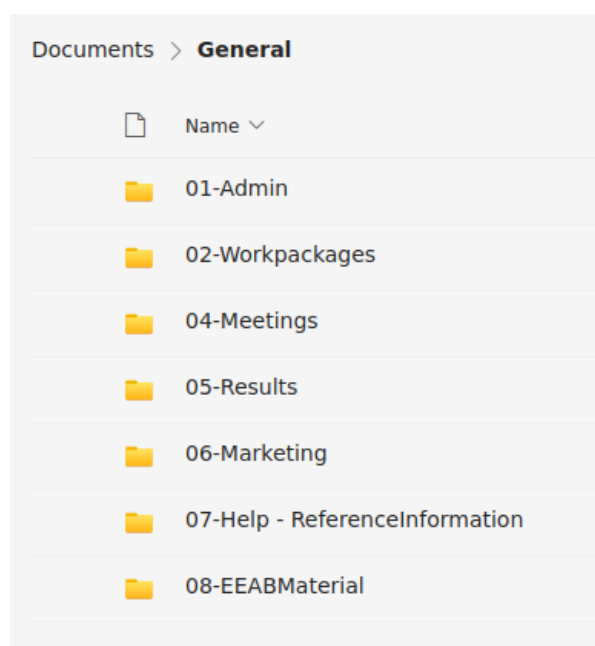


Figure 6: The CODECO repository.

The repository is **only** accessible to Partners. However, it is also feasible to set specific areas accessible to external bodies (via link sharing), for the purpose of providing specific content to external entities, such as the AB, the PO.

For the day-to-day management, monitoring, assignment and follow up of the project implementation activities, the repository provides a task list which can be set with deadlines by WPL and TLs, as well as by any partner.

7.2 Meetings

Meetings are organized in CODECO for different purposes. Official meetings (KoM, plenary meetings, review meetings) follow the procedures detailed in the GA and CA. Meeting chairs are sponisible for the organization of the meeting, ensuring that most contributing Partners can attend (therefore, recurring beforehand to tools such as Doodle); and responsible for adequate note taking and development of a concrete list of action items. Partners can take notes directly in the CODECO repository (OneNote), categorized per WP, or rely on the more formal template available in MS Teams, General channel, [06-Marketing/Templates/MeetingMinutes](#).

Meetings, when physical, will be planned to be ideally co-located with relevant meetings for the project dissemination.

CODECO considers different types of meetings as provided in Table 11. The aim of the table is to assist Partners in the daily organization of the project and its activities.

Table 11: Types of CODECO meetings.

Type	Purpose	Whom	When	Chair	Where	Outcome
KoM/1 st plenary	Overall project overview; discussion on key aspects; Partner and entities introduction	All Partners, Affiliated entities, EC, AB	M1	PC	F2F	Agenda, minutes, action items
Physical Plenaries	To direct the project, ensure correct implementation of activities at all project levels, monitor the project's progress, and examine future	All Partners, Affiliated entities, EC, AB, additional stakeholders	Q1-Q3	PC	F2F	Agenda, minutes, action items
Online Plenaries	To direct the project, ensure correct implementation of activities at all project levels, monitor the project's progress, and examine future plans	All Partners, Affiliated entities, EC, AB	Q2-Q4	PC	Telco	Agenda, minutes, action items
Interim project review	Evaluation of project results by European Commission.	EB, EC, additional selected Partners, e.g., use-cases	Within 60 days after M18	PC, PO	F2F, Telco	All deliverables to be submitted by M18; progress report; presentations
WP meetings	Each WP leader will define the meeting schedule according to the needs and the	WPLs	WPL proposes, at least once per	WP involved partners	Telco	WP minutes or notes in the CODECO

Type	Purpose	Whom	When	Chair	Where	Outcome
	coordinating actions among the involved parties for the implementation of WP activities.		month			repository; additional material, e.g., presentations
Task meetings	Ideally aligned with the WP meetings; but set also if required by the TL	TLs	TL proposes	WP/Task involved partners	Telco	Task minutes or notes in the CODECO repository; additional material, e.g., presentations
Ad-hoc meetings	Organised in case of an emergency or a conflict resolution as specified in the escalation procedure.	Partners	Ad hoc	PC	Telco	Agenda Decisions Taken Action Plan
Final project review	Evaluation of project results by European Commission	EB, additional partners	Within 60 days after project completion	PO	F2F or Telco	All deliverables to be submitted by M36; demos; presentations

7.2.1 Agenda, Minutes and Note Taking, and Participant Registration

Any meeting (face to face or online) **should have an agenda**, sent previously to the involved partners by the meeting chair.

For plenary meetings, GeA meetings, EB meetings, CODECO follows the rules set in the CA. Moreover, this section covers global guidelines for any meeting.

The meeting agenda, minutes and participants are documented under the respective WP, folder Meetings, and can also be documented via OneNote. GeA meetings require minutes based on the template proposed.

The chair proposes the agenda and, for meetings at a WP level and above (e.g., EB, GeA) should send it no later than fourteen (14) calendar days preceding the meeting or seven calendar days before an extraordinary meeting.

Any contributing Partner can propose changes by written notification to all the other Partners no later than seven (7) calendar days preceding the meeting (two days for an extraordinary meeting). During the meeting, the Partners can also add new items on the agenda following a unanimous decision.

Moreover, any agenda item requiring a decision from the GeA must be identified as such on the agenda.



Meeting minutes with a list of action items at a WP level and above (e.g., EB, GeA) require the distribution of the minutes within ten (10) calendar days following the meeting. The chair of the meeting is responsible for sending the notes and uploading them to the project repository.

The minutes (or a corrected version of them) shall be considered as accepted if, within fifteen (15) calendar days from distributing them, no partner has sent an objection in writing to the chairperson. All decisions become binding after they have been recorded in the meeting minutes and the meeting minutes are accepted.

The list of participants with at least one representative per contributing partner needs to be registered as well.

7.3 Quality Monitoring

All communication and dissemination materials must undergo a quality monitoring process, which considers different guidelines. For reporting, cf. To section 9. In terms of gender-neutrality, guidelines are set in section 11. If the communication to be developed includes results of CODECO, an ethical and security assessment check will be developed as explained in section 12.

8 Dissemination Guidelines

This section summarizes the dissemination obligations defined in the GA and CA.

8.1 Early Information on Planned Dissemination

As stated in the GA and CA:

- All partners must be informed twenty-eight days (28) calendar days before the publication of results. For this the Partner sends an e-mail to the general mailing-list [he-codeco](#) and adds also the publication in the respective reporting tool ([01-Admin/ReportingTools/EventsPublications](#))
- Partners may object within twenty-one (21) calendar days after the receipt of the publication notice.
- Communication activities guidelines are in section 7; and do not require prior notification, unless they contain results, background, or confidential information. In this case, consent of the partners needs to be provided.
- Dissemination and Communication activities are monitored via WP6, following the proposed dissemination plan (D21, M3).

8.2 Credits to the EC and to All Partners

Dissemination and Communication **must rely on the templates** provided by the PC and available in the CODECO repository under [06-Marketing/Templates](#). These templates carry disclaimers and funding acknowledgement following the EC rules, and accordingly to the rules of the Swiss State Secretariat for Education, Research and Innovation (SERI).

Any outcome derived from the project must include the following Acknowledgement.



“This work has received funding from the European Commission programme Horizon Europe, under grant agreement number: 101092696, and from the Swiss State Secretariat for Education, Research and Innovation (SERI) under contract number 23.00028.”

To assist partners in the overall dissemination, Table 12 provides a decision-aid for the inclusion of acknowledgements.

Table 12: Decision aid for including acknowledgements.

Material	Funding ack	Disclaimer	Notes
Social media	X	X	EC flag visible, shortened text in about field (Content does not necessarily reflect the views of the EC); SERI logo; CODECO logo
Press releases	X	X	See template in 06-Marketing/Templates; EC flag visible, shortened text in about field (Content does not necessarily reflect the views of the EC); SERI logo; CODECO logo
Brochures	X	X	See template in 06-Marketing/Templates; EC flag visible, shortened text in about field (Content does not necessarily reflect the views of the EC); SERI logo; CODECO logo
Newsletter	X	X	EC flag visible, shortened text in about field (Content does not necessarily reflect the views of the EC); SERI logo; CODECO logo
Presentations	X		Rely on the template available under 06-Marketing/Templates
Reports and deliverables	X	X	Rely on the template available under 06-Marketing/Templates
Videos	X		EC flag visible, shortened text in about field (Content does not necessarily reflect the views of the EC); SERI logo; CODECO logo

8.3 Joint Publications

Decisions about authorship for scientific publications is guided by the international principles of ethical conduct, being the key one followed by CODECO the **ACM code of conduct** be guided by accepted international guidelines for ethical conduct and authorship.

To be able to agree on authorship, plans for project-related publications need to be communicated to all other beneficiaries well in advance (see also the rules of the Consortium Agreement). For this purpose, Partners have an xls to report outcome under [01-Admin/ReportingTools/EventsPublications](#). **This xls is supervised by the WP6 leader (UGOE) periodically (every quartal), and the results are presented in each plenary.**

8.3.1 Scientific Papers, Events, Editorial Joint Work

All persons who have made substantial professional contributions to the research must be included as authors; their names will be in order of the importance of the contribution. To qualify as primary author of a scientific paper a person **must be actively involved in the writing of the paper** and be involved in at least two of the following activities:

- Contribute to the formulation of study hypotheses verbally and in writing.



- Contribute to the study or specific outcome being described.
- Analysis of results.
- Interpretation of the results.

In addition, Partners that did not contribute actively but were nonetheless involved in aspects such as data collection must be acknowledged in the publication.

8.4 Deliverables

Decisions about (co-)authorship, contributor status and acknowledgements for deliverables should be guided by the following rules:

- Contributors of substantial amounts of text in the draft document will be mentioned as **authors**.
- Persons providing written comments and text revisions in the draft documents and extensive comments in emails (or other documentation) will be mentioned as **contributors**.
- Persons contributing to case studies, discussions, and oral comments will be mentioned in the **acknowledgements** section, detailing the nature of the contribution.

9 Project Reporting Aspects

Table 13 summarizes the project reporting structure, explaining the categories of reporting, their purpose, frequency, who leads, who contributes, and the expected outcome.

Table 13: Project reporting guidelines summary.

Type	Purpose	Frequency	Lead	Whom	Outcome
Interim Progress Reports	18-month reporting progress of project achievements and effort consumption for evaluation by the EC	18 months	PC	All partners, EC	Delivery of interim project progress report following EC guidelines; and CODECO templates and reporting tools. Upload of Form C (and Certificate of Financial Statement, when needed) to EC via ECAS.
Deliverables	Report work progress and provide clarifications and usage support for outcome of the project.	According to 'List of Deliverables at section WT2: 'List of Deliverables' in the Annex 1 of the DoA	DL	Contributing partners	Deliverables, following the template provided by CODECO, available under 06-Marketing/Templates/Deliverables •

9.1 Documentation Formatting and Templates

Templates to be used in CODECO for deliverables, presentations, or any form of outcome follow specific rules from the EC and require the mention of all partners. For this purpose, CODECO considers official templates that can be found in the repository under [06-Marketing/Templates](#). Templates will be improved based on feedback from all Partners, during the whole project lifetime.

To facilitate the information exchange, CODECO follows a filename convention:

CODECO_<document_id_nr>_<date>_<Partneracronym>_<version>.extension,

Where:

- Date, DDMMYYYY
- Document ID, e.g., Deliverable_D1, Presentation_CONEXT2023
- Version, increasing number, placed in the list of changes, e.g., v0.1, 0.2.
- Partner acronym, e.g., FOR, ATOS

Examples:

CODECO_Deliverable_D1_01032023_FOR_v0.1.doc

CODECO_PresentationCoNext2023_04052023_UGOE_v1.ppt

When multiple Partners write on the same document, they should:

- Increase the version number.
- Change the partner acronym.
- Add changes with the responsible person to the list of changes.
- The version released to the coordinator to be submitted to the EC is changed to **x+1.0**, if the revisions performed concerned **v0.x**.

9.2 Deliverable Development and Submission Guidelines

CODECO shall provide 30 deliverables (rf. To section 3.2) of different types. To ensure a transparent, high-quality, and timewise submission of the proposed deliverables, this section describes a set of guidelines to be followed by Partners.

All deliverables must undergo a quality assessment process, including gender- proofing (see section 11). Some deliverables must undergo an additional ethical and security assessment (see section 12).

CODECO deliverables should be developed based on the format and templates mentioned in section 8.1, following the process described in Table 14.



Table 14: Deliverable development and internal review process.

Who	What	To Whom	Due
DL	<ul style="list-style-type: none"> Prepares and uploads a ToC to the repository, sending a mail to all Partners via the generic mailing-list. Proposes assignments to Partners. Presents a timeline for the development and submission. 	Contributing Partners, internal reviewers	6 weeks before submission
DL	<ul style="list-style-type: none"> Updates ToC according to comments 	Contributing Partners	4 weeks before the submission
Contributing Partners	<ul style="list-style-type: none"> Complete assignments Issue intermediate releases 	Contributing Partners, DL	According to the proposed timeline
DL	<ul style="list-style-type: none"> Edits and consolidates input. Issues first complete draft for comments 	Contributing Partners, WPL	2 weeks before deadline
DL	<ul style="list-style-type: none"> Collects reviews, issues updated draft. Releases to internal reviewers 	Internal reviewers, contributing Partners	10 days before the submission
Internal reviewers	<ul style="list-style-type: none"> Revise the deliverable and comment 	DL	1 week before the submission
DL	<ul style="list-style-type: none"> Final editing, integrating comments 	WPL, PC	5 days before the submission
PC	<ul style="list-style-type: none"> Final approval (if not approved, returned to the DL) 	--	2-3 days before the submission
PC	<ul style="list-style-type: none"> Submission to the EC Places the submitted deliverable (pdf and doc) under 05-Results/Deliverables/Dx 	EC	1 day before the submission

9.3 Quality Criteria

This sub-section provides an overview on key criteria that need to be considered by the DL, Partners, and reviewers, to ensure the quality of the deliverables. The quality criteria are checked by the DL, based on a document provided together with each deliverable template.

9.3.1 Formal Criteria

Regarding formal criteria:

- Is the deliverable based on the proposed CODECO template?
- Are the deliverables spell-checked and grammar-checked for British English?
- Is the deliverable well-written, readable, and understandable by the target audience?
- Is the deliverable written in gender-neutral language (rf. To section 11)?
- Does the deliverable have a coherent, clear, understandable storyline and structure?
- Is the dissemination level assigned correctly?
- Are all authors and contributors adequately acknowledged?
- Is Background and foreground material adequately respected?

- Have ethical and security screenings been performed, if applicable (rf. To section 12)?

9.3.2 Content Criteria

In what concerns content:

- Are the purpose and scope of the deliverable clearly defined and described?
- Does the deliverable serve its purpose as stated in the GA, in compliance with the DoA and covering the expected results?
- Is the deliverable coherent, technical sound, and complete?
- Does the deliverable contain an appropriate level of detail?
- Is the terminology in CODECO (D9) adopted, and additional terminology explained?
- Does the deliverable avoid unrequired content duplication?
- Does the research covered adequately address gender-neutrality concerns (section 11), ethical and security concerns (section 12)?

10 Effort and Cost Management

10.1 Methodology

The PC with the support of the Project Management Team is responsible for managing and reporting on the project's budget and effort consumption at the project level, as has been described in section 4.

During the interim and yearly progress reports the PC, with the assistance of the Project Management Team, presents and reviews the Partner efforts, costs performance of the former period. Performance is measured comparing actual consumption against planned provided by each Partner, in alignment with Annex 1 and Annex 2 of the GA.

The PC will rely on the collected information via the CODECO reporting tools provided to Partners in the CODECO repository ([01-Admin/ReportingTools](#)).

Performance is measured comparing actual consumption against planned. The PC is responsible for accounting for cost and effort deviations and presenting the consortium with options for getting the project back on budget.

Effort and costs in CODECO are handled at the WP level but based on detail of PMs provided per Task. The financial performance of the project will be measured and managed through comparisons between planning and consumed resources. To avoid confusion and complications due to conflicts between National and European Union reporting rules, all efforts are to be reported in full hours. Euro amounts are to be reported in two decimals.

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



10.2 Reporting Procedures

Partners are expected to internally register, via the proposed reporting tools, effort and resource consumption, as well as costs (rf. To the CODECO repository, [01-Admin/ReportingTools/EffortCost/](#)). The xls contains PMs per task, computing the overall effort per WP automatically, and also deviations from the Partner original planning.

The xls also contains a worksheet where Partners need to register any cost beyond personnel costs, based on the specific rubrics detailed in the Budget and automatically provided in the reporting tool. The overall process for reporting per project period is provided in Table 15.

The following reports are considered:

- Every 3-6 months, internal periodic effort, and cost reporting – to the Project Management Team. Rf to steps 1-3 in Table 15.
- Periodic Progress Reports (for external reporting to EC). Rf. to steps 1-2; 4-7 in Table 15.
- Short progress reports (internal reporting before each GA meeting).

Table 15: Reporting Process steps.

Nr	Steps	Who	To Whom	When	Tools
1	PM planning registered in the Reporting Tools	All Partners	PMT	M1-M3	01-Admin/ReportingTools
2	Consumption of PMs per task; additional costs incurred	All partners	PMT	Every 3 months	01-Admin/ReportingTools
3	Deviations discussed with WPL and TLs	PMT	PMT, EB, PC, Partners incurring deviation	1 week after registration (every 3 months)	01-Admin/ReportingTools, Mails
4	For each reporting period, WPLs and TLs collect information concerning progress, based on CODECO templates	WPL, TL and Partners	TL, WPL, PMT	30 days and until the end of the reporting period	Progress report template 06-Marketing/Templates/PPR
5	PC consolidates the information on the PPR	PC	EC	60 days after the end of the reporting period (M18 and M36)	Interim/annual deliverable, email
6	Upload of Form C and CFS if required to ECAS	Partners	EC	20 days after the end of the reporting period (M18 and M36)	ECAS

Nr	Steps	Who	To Whom	When	Tools
7	Overview per WP	WPL, assisted by TLs and contributing partners	PC	1 week before the meeting	Template based on power point, under 06- Marketing/Template

10.2.1 Unplanned Expenses Reporting

The GA Annex 2 details a budget for each partner and for each task or activity in CODECO. Any effort or cost allocation which deviates from this plan presents an **unplanned expense** and are therefore a cost deviation.

Unplanned expenses are, in principle, not allowed. However, based on justification and needs regarding the project development not foreseen by partners, it is feasible to perform a request for specific unplanned expenses. Unplanned expenses require permission from the PO. Therefore, the Partner needs to follow the procedure proposed in section 5 for cost deviations so that the PC can obtain authorization from the PO.

10.2.2 Travelling and activities outside Europe

The outcome of CODECO is expected to have impact in Europe. Therefore, event organization and planned activities should take into consideration the need to consider Europe as first key target. Nonetheless, in terms of research, several flagship venues are organized periodically across different continents.

For travelling or costs associated with events outside the European Union, Partners need to send an e-mail to the WP6 leader (UGOE) with the following information:

- Persons travelling.
- Destination and duration of the travel.
- Relevancy (justification) for the travel in the context of CODECO activities, linked to concrete KPIs.

WP6 leader will examine the request, following the process for deviations proposed in section 5, and informing the Partner about the result.

11 Gender Neutral Guidelines

This section provides guidelines to assist the integration of gender (and diversity) dimensions during the project implementation, in research activities. These guidelines are based on the EC gender equality guidelines and aim at assisting the development of the work by rethinking standards, and questioning norms, behaviour, and attitudes, to best suit the needs of the target groups, thus strengthening the impact proposed by CODECO.



11.1 Terms of Reference for Gender-neutrality

CODECO adopts several terms of reference derived from the European Union Gender Equality Glossary and Thesaurus², listed in Table 16.

Table 16: Gender-neutrality terms of reference.

Term	Definition
Gender neutral language	Language that is not gender-specific, and which considers people in general without references to sex, gender, and gender bias.
Gender-sensitive language	Gender equality in written and spoken language, attained when men, women, and non-binary genders are equality made visible and referenced to with equal value, dignity, integrity, respect.
Gender	Social attributes and opportunities associated with being female and male and to the relationships between women and men, girls, and boys, as well as to the relations between women and those between men.
Gender Bias	Prejudiced actions or thoughts based on the gender-based perception that women are not equal to men in rights and dignity.
Sex	Biological and physiological characteristics that define humans as female or male.
Gender stereotype	Generalised ideas, images, concepts about people within a society. A gender stereotype is a preconceived idea where women and men are assigned characteristics and roles determined and limited by their gender.

11.2 Gender Approach in the CODECO Implementation

In CODECO, there are four categories of activities that are expected to benefit from a gender-sensitive research and implementation approach: the **project management and coordination**; the **project communication and dissemination**; the **Research and Innovation Community Engagement** and **skills training** activities; the **development of computational solutions** and integration of AI for specific communities. Measures to assist gender-neutrality across the different activities, and verification measures to ensure an adequate quality level are provided in Table 17.

Table 17: Gender-neutrality proposed methodology and verification measures.

Activity	Gender methodology	Verification measure
Project Management and Coordination (WP1)	<ul style="list-style-type: none"> Monitor and analyse the involvement of female researchers in the project, including the AB. Ensure that men and women of the different stakeholders can benefit equally from the CODECO results. 	<ul style="list-style-type: none"> Provide a gender analysis section on each PPR. Monitor deliverables and establish gender-neutral guidelines for deliverable and code writing.
Project Communication and Dissemination (WP6)	<ul style="list-style-type: none"> Increase the visibility and representation of women, when communicating and disseminating results. Ensure balance and diversity on events organized by CODECO, in terms of Committees, evaluators, and participants. 	<ul style="list-style-type: none"> Provide a section on deliverables of WP6, analysing the gender involvement and gender bias dimension, as well as perceived usefulness of CODECO by different sexes in the different deliverables.

² <https://eige.europa.eu/thesaurus/>

Activity	Gender methodology	Verification measure
	<ul style="list-style-type: none"> Adopt mechanisms to advertise and promote events and activities, encouraging the participation of underrepresented groups. 	
Research and Innovation Community Engagement (WP7)	<ul style="list-style-type: none"> Propose specific targets to involve women, e.g., best award for a female lead SME. Ensure that participants sample is heterogeneous enough to best capture the needs and interests of each target group. Propose skills training material that is directed to underrepresented groups. 	<ul style="list-style-type: none"> Description of the actions taken such as a sub-programme targeting underrepresented groups in the “research and Innovation Community Engagement” programme, in WP7 deliverables.
Technical activities – software (WP2, WP3, WP4, WP5)	<ul style="list-style-type: none"> Define use-cases based on a design strategy that pays attention to sex, gender, and biases. Understand and explore how the tools to be developed can help the CODECO stakeholders in understanding gender biases and eventually in modifying behaviour. Design and implement the CODECO solutions in a way that it can be accessed by different groups and as many people as feasible, independently of background. Consider impact assessment measures (for the activities developed) that can assess the gender dimension, interest, and impact. 	<ul style="list-style-type: none"> Adopt gender-neutral coding rules (rf. To section 10.5). In WP5, T5.1 (AI Governance), analyse and develop a methodology that takes into consideration the development of gender-neutral algorithmic and AI solutions, to prevent AI discrimination, for instance.

11.3 Gender-neutral Communication and Dissemination

The EC provides guidelines for gender-neutral language [2], based on principles of gender neutrality and non-discrimination. CODECO adopts such rules in the writing of any outcome, to ensure that, as far as possible, non-sexist and gender-inclusive language is adopted in the implementation of the project.

The guidelines proposed in this section are considered a starting point, which can be revised and modified during the project, based on Partner and stakeholder feedback, for instance. These guidelines are summarized in Table 18.

Table 18: Gender-neutral guidelines for the implementation of CODECO.

Aspect	Gender-neutral CODECO approach
Generic use of masculine nouns that define a part to represent the whole, such as “Man”, manpower, men-month	<ul style="list-style-type: none"> Man - Humanity Manpower – staff Manmade – synthetic, artificial
Masculine pronouns, e.g., his	<ul style="list-style-type: none"> Use plural forms.

Aspect	Gender-neutral CODECO approach
	<ul style="list-style-type: none"> • Omit the pronoun (the work is dependent on his stay – the work is dependent on the length of the stay) • Use the passive voice. • If none works, adopt “he or she”.
Ensure all genders are represented	<ul style="list-style-type: none"> • Ensure all genders (including non-binary) are represented in all surveys, forms, feedback, or consent from stakeholders. • Ensure different genders take roles that are traditionally envisioned to a specific gender, e.g., consider an equal balance from different genders in panels, TPCs. • Develop dissemination material (videos, photos, images) taking into consideration diversity (of gender and others). • Explain, in the organization of events, how the different gender representation will be captured.
Avoid gender stereotypes	<ul style="list-style-type: none"> • Avoid language including gendered pronouns, nouns. • Avoid gendered stereotypes as descriptive terms. • Avoid gendering inanimate objects. • Avoid using different adjectives for women and men. • Avoid social stereotypes (e.g., in a use-case, considering a specific female traditional roles vs a male traditional role).
Avoid omission	<ul style="list-style-type: none"> • Avoid the use of man as a neutral term. • Do not use gender-biased nouns to refer to groups of people. • Consider the choice of voice-overs, photos/images, and the gender of individuals given in examples when creating communication and dissemination material. • Ensure a balanced gender (and diversity) representation in speaking, representation, and participation roles.
Avoid subordination	<ul style="list-style-type: none"> • Avoid language that reinforce a traditional role of a gender, e.g., men’s traditional dominance over women. • Always use the same naming conventions for men and women • Avoid objectification

11.4 Addressing Gender Aspects in Research

This section proposes a check list for the development of research activities within the CODECO project that takes into consideration gender-neutrality, derived from the Toolkit Gender in EU-funded research [3] published by the EC, Directorate-General for and Innovation.

Research idea phase:

- If the research involves humans as research objects, has the gender dimension been analysed?

Methodology:

- Does the methodology ensure that gender aspects will be considered in data collected, and such aspects will be adequately documented?



- Does the respective deliverable/paper/etc explicitly and comprehensively explain how gender issues will be handled?
- Does the research consider different outcome and different impact in terms of gender?

Research development:

- Does this phase consider surveys, focus groups, etc., designed to unravel potentially relevant sex and/or gender differences in the data?
- Are the groups involved in the research adequately gender-balanced?
- Is the data collected and analysed adequately set to integrate balance in terms of gender?

Dissemination and communication:

- Does the research analysis present statistics, output, focusing on relevant gender differences that came up during the research development?
- Do the stakeholders consider specific entities that focus on gender aspects?
- Does this phase contemplate the organization of specific events/sub-programmes addressing underrepresented groups?

12 Ethical and Security Assessment

During the CODECO development, ethical and security aspects need to be monitored and assessed. CODECO contemplates different activities in WP1, WP5 and WP6, to handle the security, information sensitivity and ethical aspects regarding data collected, and research developed.

In what concerns the ethical and security related aspects, CODECO counts with “D2 – Data Management and Ethics Plan” (M3, INO). This handbook describes a summary of measures and procedures to be considered by Partners, as starting point for an ethical, safe, and fair development of research.

The Partners shall follow the proposed guidelines described in the GA, Annex I, where Partners and CODECO needs to comply with relevant EC directives and regulations. As explained in section 4, the PC, and the consortium count with an ETC which shall monitor the development of ethics and security risks, regularly informing the EB and the GeA.

CODECO shall follow legal requirements established by the EC and national authorities in particular concerning data protection and privacy issues. Data management is handled via T1.1, and the procedures to handle data are described in D2 [1].

13 Summary

This deliverable is a living-tool which provides a single point of reference to the processes, tooling, and overall structure required to assist an adequate monitoring and development of the daily operations and project activities in CODECO. The deliverable describes procedures and methodologies related with the overall operation of CODECO; submission of outcome (such as deliverables); project reporting; handling and management of efforts and costs. The deliverable also covers gender-neutral guidelines, to assist the project in providing gender-neutral outcome across its different activities.



As a living-document, D1 will be checked by the end of each project year, and updates will be done, derived from change requests to the project operation.




14 References

- [1] CODECO D2: Data Management and Ethics Handling v1.0. March 2023
- [2] European Institute for Gender Equality. Gender Sensitive Language. Available at: <https://eige.europa.eu/publications/gender-sensitive-communication/first-steps-towards-more-inclusive-language> (consulted: January 2023).
- [3] European Commission Directorate-General for Research and Innovation. European Toolkit Gender in EU Research. October 2011. Available at: <https://op.europa.eu/en/publication-detail/-/publication/c17a4eba-49ab-40f1-bb7b-bb6faaf8dec8> (consulted: January 2023).



Annex I – Project Documents

Deliverable Template

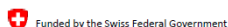


CODECO

Cognitive Decentralised
Edge Cloud Orchestration

DX: TITLE
Version xx

Work package	WPX – Title
Task	Task x.y – Title
Due date	Date as in GA
Submission date	Submission after internal revision
Dissemination Type	Public, Confidential, etc.
Deliverable lead and editor	Partner, person name
Contributing Partners	1 person, affiliation, e.g., R. Sofia (FOR)
Version	Xx
Reviewer 1	Name, affiliation
Reviewer 2	Name, affiliation



Project Partners



Affiliated Entities



2

Presentation Template



OVERVIEW

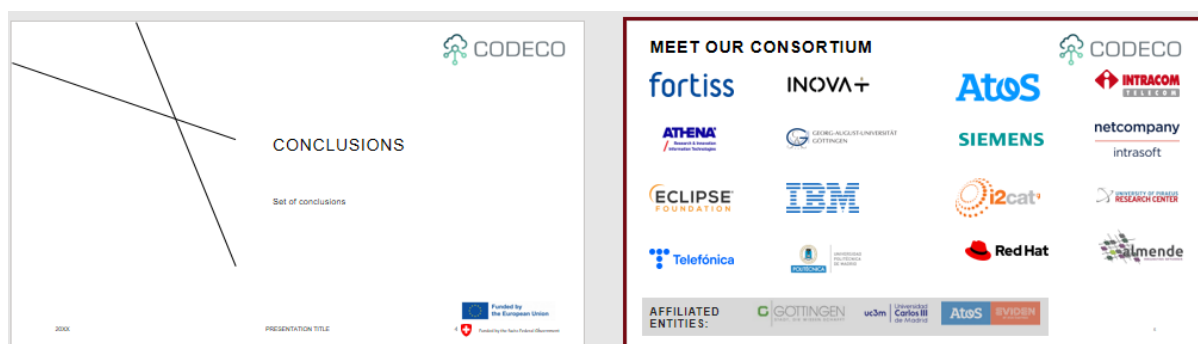


200x



PRESENTATION TITLE

2





Plenary Meetings Agenda and Minutes Template

Meeting Title

Date, xx-xx CET


Webconferencing Coordinates

Tool, e.g., Webex, MS Teams, etc.	Phone numbers

Attendance List

Partner	Persons
FOR	
INO	
ATOS	
ICOM	
ATH	
UGOE	
SIE	
INTRA	
ECCL	
ICCAT	
UPRC	
TID	
UPM	
RHT	
ALM	
IBM	

Meeting Minutes
Grant Agreement nr: 101092696



Agenda


Duration	Topic	Resources
	1.	
	2.	

Minutes

1.Xxxxxx
xx

List of Action Items

WP/ Task	Action Item	Deadline	Who	Status
			Partner, person	



2