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PRINCIPAL INVESTIGATOR	Prof Gabriele Gattiglia, UNIPI
TEL:	+39 050 2215228
E-MAIL:	gabriele.gattiglia@unipi.it

D 1.1 Management Plan

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Lead Author (Org):	Francesca Anichini (UNIPI)
Contributing Author(s) (Org):	Gabriele Gattiglia (UNIPI
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01	25/01/2025	Francesca Anichini	Creation
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Disclaimer

Abbreviations

AMZ: Arheoloski Muzej u Zagrebu

CL: Culture Lab

D: Deliverable

DoA: Description Of the Action

EM: Exploitation Manager

HUJ: The Hebrew University of Jerusalem

IIT: Fondazione Istituto Italiano di Tecnologia

INRAP Institut National de Recherches Archeologiques

IPR: Intellectual Property Rights

KCL: King's College London

M: Month

MIN: Miningful srls

PO: Project Officer

QB: QBrobotics Srl

T: Task

TL: Task Leader

UB: Universitat de Barcelona

UBM: Universite Bordeaux Montaigne

UNIPI: Universita di Pisa

UoY: University of York

WP: Work package

WPL: Work package Leader

Executive summary

This document represents the *Quality Plan* for the **AUTOMATA** project. The purpose of this deliverable is to provide an overview of the procedures and methodologies to be adopted during the project lifetime in order to ensure efficient project execution as well as the quality level of the project deliverables and the project outcomes. The objective is to guarantee the successful running and achievement of the project goals while ensuring consensus on activities between project members through the provision of a reference point that establishes the standards and rules to be adopted.

In particular, this deliverable defines a set of rules for the organisation of day-to-day cooperative work within the project, including the procedures to be used, the decision-making protocols, the reporting mechanisms, the organisation of meetings, the control of information flow, the reliability of the output, the coordination activities with ECCCH infrastructure via ECHOES project, and the preparation of documentation for submission to the EC.

In this context, quality control mechanisms are defined in order to be easy to identify important tasks and dependencies that are critical for the success of the project. This document will also serve as a detailed guide to the **AUTOMATA** Consortium in order to establish effective cooperation within the Consortium itself and to ensure the highest level of quality of the project documentation.

The document will serve as a guide for the Project Coordinator (PC) in order to ensure that quality reviews will occur at appropriate points in the project and will provide the Partners with a concise reference to the project management structure, tasks, responsibilities and reporting requirements.

This document should be used as a reference by the Project Coordinator and all project Partners.

The general principles for the project execution have been defined in the EC Grant Agreement (EC-GA) and in its Annexes. The *Quality Plan* does not replace any of these established agreements, or replace any of the EC guidelines for project implementation and documentation.

1   Introduction

1.1   Purpose and Scope

This document is the first deliverable from Work Package 1 Management RP1 (WP1), Task 1.1 (T1.1) *Quality Plan*. The purpose of this document is:

- to serve as a guideline and reference for project management activities to be followed throughout the entire project duration;
- to be used as a manual for all the members of the **AUTOMATA** project Consortium, compiling all the procedures and tools to enable successful collaborative work towards achieving the project objectives with the highest quality.

The document covers procedures and best practices for the following project management activities:

- Project management

- Communication and collaboration within the project group

- Monitoring and Management of documents and other project artefacts (including deliverables production)

- Risk management

- Change management

This document was released in Month 5 (M5) and provides the first release of procedures and tools to support the procedures and guidelines. Although the processes and guidelines described in this document are in a mature state, it is intended that, as time passes, the procedures are put in place, and the tools are used, some modifications and adaptations could be necessary. Therefore, this document will be revised when required, and the Consortium will be notified about the changes in due time.

1.2   Deliverable Structure

This deliverable complies with the **AUTOMATA** DoA outlined in WP1, 13, 14, and it particularly satisfies specifications outlined in T1.1/ T13.1 / T14.1: Technical Management and Quality Control during the three different reporting periods.

It is intended to benefit the work of the following interrelated tasks: T1.1/13.1/14.1 - Technical Management and Quality Control; T1.2/13.2/14.2 Administrative/Financial Management and Reporting; T1.3/13.3/14.3: Management of Knowledge and IPR; T1.4 Establish Initial Contact and Understanding with ECCCH and following tasks of consolidation, T13.5 Ongoing Collaboration and coordination with ECCCH, and T14.4 Data Creation and Linking Consolidation with ECCCH.

The current document is composed of the Abbreviation list, the Executive summary, an Introduction, 5 main Chapters, and the Conclusions.

The first Chapter describes the Project management structure and bodies, their responsibilities, and the tools and procedures established for the day-to-day project management, including those to ensure clear and effective communication between the Partners.

Chapter 3 presents the methodologies used to monitor and report the Project's progress.

Chapter 4 outlines the production and quality assurance process to ensure a timely and high-quality delivery of all the Project's deliverables.

Chapter 5 details the risk management plan, including the identified mitigating measures and the associated contingency actions.

Chapter 6 enlightens the procedure to follow in case of Deliverables or DoA changes.

Chapter 7 explains the rationale of IPR Management, which will be detailed in the D1.2 IPR Management Plan.

2 Project governance and structure

This section describes the Project management structure and bodies, their responsibilities, and the tools and procedures established for the day-to-day management of the project.

2.1 Management structure

The proposed management structure follows the consolidated experience of several partners of the **AUTOMATA** Consortium. Therefore, the structure proposed has been carefully designed, taking into account the complexity of a research project involving multiple organisations with different cultures and working methods and the effort required to encompass the management of knowledge, intellectual property, innovation activities, communication coordination and exploitation and sustainability activities organised to cope with the inherent complexity.

The organisational structure of the Consortium comprises the following Consortium bodies:

- the Project Coordinator (PC), that is the legal entity acting as the intermediary between the Parties and the Funding Authority. The coordinator shall, in addition to its responsibilities as a party, perform the tasks assigned to it as described in the GA and in the Consortium Agreement (CA);
- the Management and Technical Board (MTB) as the ultimate decision-making body of the Consortium;
- the Work Package Leaders (WPL), the Task Leaders (TL) and the Exploitation Manager (EM).

The following sections explain the composition of the governing bodies, outlining their main responsibilities.

2.1.1 Project Coordinator

The PC (University of Pisa) is the legal entity acting as an intermediary between the project Consortium and the European Commission (EC) in all contractual and administrative aspects related to the project and will be in charge of the following tasks:

- overall management and monitoring of the project and its activities;
- progress monitoring;
- detailed planning and monitoring of compliance with the contract of each partner (i.e. precise and timely fulfilment of contractual, legal and financial matters);
- timely delivery of good-quality reports and deliverables to the EC;

- facilitating targeted communication within the project and with relevant bodies outside the Consortium, particularly with ECHOES-ECCCH Coordinators and Boards;
- interface between the project and the EC;
- chairing the MTB;
- IPR issues;
- risk management in the project;
- managing and contributing to solving potential differences or conflicts between the partners;
- encouragement and motivation of the individual partners and WPLs, as well as creating team spirit and a good working atmosphere;
- maintain focus on the expected impact of results as a guiding criterion in decisions;
- oversee and execute the distribution of financial contributions.

The PC is supported by the Project Officer (PO) in managing contract revisions, cost statements, and related documentation, as well as in adjusting budget allocations due to potential task reallocations and other project activities. With the consensus of the MTB, the PC can request and finalise amendment procedures. The details of the tasks and responsibilities assigned to the PC are described in the GA and the CA.

2.1.2 Management and Technical Board

The MTB is the formal decision-making body of the project in any issue related to financial, resources, negotiation, Grant Agreement amendments, IPR, etc. and is formed by one top-level delegate from each WP leader (WPL) and/or all Scientific Team leader of the **AUTOMATA** Consortium for strategic decision making, chaired by the PC.

The PC chairs all meetings or, in its absence, the member appointed by the MTB members present or represented.

Members of the MTB should be present or represented at any meeting or may appoint a substitute or a proxy to attend and vote and should participate in a cooperative manner in the meetings. The MTB member should notify about the representative to the PC prior to the meeting. Technical advisors may attend the meeting in order to discuss a specific argument.

The Consortium members agree to abide by all decisions of the MTB.

The main responsibilities of the MTB are:

- definition of overall project strategy;
- fulfilment of the EC's requirements: presentation of progress and financial reports, work-plan monitoring, variation of contractual terms and/or schedules and any other legal, contractual, ethical, financial and administrative issues;
- decisions on long-term exploitation plans, coordinating at the Consortium level the knowledge management and other innovation-related activities;
- conflict resolution within the Consortium;
- technical coordination and decision-making: assessment of the technical work (progress of WPs, progress reviews, identification of the risks), interchange of technical information amongst partners, submission of deliverables and quality check;
- risk management, discussing and proposing major changes in the work plan in response to new problems or new situations, arbitrating policies and resolving conflicts, and approving major modifications to project plans.

Organisation	Member	Substitute	technical advisor
UNIPI	**Gabriele Gattiglia (PC)**	Francesca Anichini Claudia Sciuto	Federico Cantini Niccolò Mazzucco Simonetta Menchelli Veronica Neri
UBM	**Rémy Chapoulie**	Xavier Granier	Loic Espinasse
INRAP	**Amala Marx**	Kai Salas Rossenbach	Théophane Nicolas Emmanuelle Bryas Sylvie Eusèbe
AMZ	**Ivan Radman-Livaja**	Filomena Sirovica Jana Kopáčková	
QB	**Fabio Bonomo (EM)**	Riccardo Persichini Alberto Brando	Giuliano Dami
HUJI	**Leore Grosman**	Heeli Schechter	
MIN	**Nevio Dubbini**	Annalisa Maggini	
IIT	**Antonio Bicchi**	Manuel G. Catalano Giorgio Grioli Arianna Traviglia	Do Won Park
UB	**Jaume Buxeda i Garrigós**		
CL	**Gian Giuseppe Simeone**	Alexis Castro	
UoY	**Julian Richards**	Holly Wright	
KCL	**Ivan Tyukin**		

Table 1. The Members of the Management and Technical Board

2.1.3 Work Package and Task Leaders

Each WPL is responsible for the management of his/her work package. They are supported by the leaders of embodied tasks. WPL main responsibilities include:

- technical management of their WPs, including consecution of deliverables and milestones and liaison with task leaders. Each WPL will also be responsible for the quality assurance of documents and deliverables produced;
- technical reporting to the MTB;
- communication exchange amongst the partners involved in their WP.

Moreover, a TL has been designated for each of the tasks composing the WPs, performing the technical management of the corresponding activities:

- planning;
- monitoring and reporting to the WPL.

2.1.4 Exploitation Manager

The EM is responsible for the ongoing management of project exploitation preparation activities. The EM works closely with the PC and other TLs to implement an effective and dynamic innovation

management of the project. The goal of innovation management is to allow managers, researchers and engineers to cooperate with a common understanding of processes and innovation goals, with the objective of allowing the Consortium to respond to external or internal opportunities and use its creativity to introduce new ideas or products.

EM has a coordinating role in drawing together exploitation possibilities for project results as a whole, with the aim of exploiting them as a product or a set of products at the end of the project. He is in charge of monitoring the plans and progress of the project and advises on all issues relating to the commercial exploitation of the project.

The EM, in particular:

- is responsible for arranging and coordinating the in-situ demonstrations, reporting the feedback received, and influencing technological development by updating specifications to make sure the developed technologies will be taken up by potential users after the project is finished and results are productised;
- monitors competitive products and technologies, and advises which aspects and features can help to differentiate results from the rest, which will then be emphasised in dissemination activities;
- maintains contacts and updates interested parties about recent developments.

2.2 Collaboration and communication

To ensure effective internal collaboration and communication among Consortium members, the project relies on two main methods:

- Project meetings (face-to-face and/or virtual conferences);
- A shared document repository.

For efficient and structured management of all documentation and materials generated during project activities—and to ensure their accessibility to all Consortium members—a dedicated repository has been established for managing working documents, reports, official outputs, and deliverables.

Regarding communication and dissemination activities, these are coordinated by WPs 11, 12, and 10, with deliverables D11.1 and D10.1 outlining the overall strategy and plan for the project's communication and dissemination efforts.

2.2.1 Project Meetings

The following categories of meetings and audio conferences are envisioned to be organised during the project:

2.2.2 MTB meetings (online or in person):

The MTB shall meet at least twice per year and at any time upon written request of 1/3 of the members of the MTB, or at the request of the PC.

All the details about the functioning of the MTB and its responsibilities, the rules for voting and other specificities are described and regulated by the terms of the CA (decision procedures detailed in §2.1.2).

2.2.3 General meetings (online or in person):

General meetings, which can take place both on-site and online, are organised to review project activities, discuss key issues, and assess potential risks in project implementation. These meetings bring together project leaders, research teams, and, when relevant, external collaborators, technical experts, or specialists who can provide reports or consultancy on specific topics.
The agenda of these meetings includes:

- Technical aspects of the project (unexpected challenges, new ideas);
- Financial and administrative matters;
- Strategic discussions, particularly regarding the sustainability of project results;
- Risk management, deviations, and necessary adjustments.

Whenever possible, General Meetings will coincide with other events—whether organised by the project or not—that involve at least part of the project team. This approach aims to optimise travel costs and enhance the sustainability of in-person participation. The frequency of General Meetings will be evaluated annually based on project needs, with the MTB determining the approximate date and location of the next meeting during each General Meeting.

2.2.4 Technical meetings (online or in person):

Technical meetings are dedicated to discussing and assessing the progress of the various WPs. In addition to the PC, participants include the WPLs, TLs, and any other staff members or consultants who can contribute to specific discussions on the activities in question.
A Technical Meeting may cover multiple WPs whose activities, deliverables, or milestones are closely interconnected. Depending on the project timeline and WP duration, technical meetings are typically scheduled at least once per semester.
The PC is responsible for convening technical meetings, either announcing them during the General Meeting or upon specific request from the WPLs. The date can be set using a voting poll facility (e.g., http://doodle.com) to accommodate the availability of all participants.

2.2.5 Decision-making protocol and conflict resolution

Daily decision-making will correspond to the different TLs, though they will always try to find a consensus between the different task executors. In case of conflict, the solution will be discussed with WPLs for a consensus. If no consensus is reached, the PC will take an executive decision. If necessary, the PC will organise a conflict resolution meeting with all the representatives of the respective level within 30 days following the receipt of a written request from a project partner. Requests for meetings must include hints for potential solutions; replies must be given within a stated time. Agreements are searched for through dialogue and mutual concession. In the case of failure, a meeting at the upper level will be arranged. In case of convening an MTB resolution meeting, the MTB will firstly seek consensus, then secondly a majority (each partner having one vote). In this case, decisions shall require a qualified majority of 2/3 of the Voting Parties present or represented. Only representatives of MTB Members have votes.

3 Monitoring and reporting procedures

3.1 Reporting Periods and Documentation

The GA defines three reporting periods:

- RP1: Month 1 – Month 15
- RP2: Month 16 – Month 30
- RP3: Month 31 – Month 54

The Periodic Reports, structured according to the Portal Periodic Reporting Tool, will document technical, financial, and strategic aspects of project progress. The PC will oversee the continuous collection, compilation, and storage of all necessary materials for each reporting period. Additionally, the PC will ensure the timely submission of all deliverables, milestones, and expected outputs/outcomes.

The technical and scientific overview of each reporting period's implementation will be developed collaboratively with WPLs, reviewed by the MTB, and formally submitted by the PC via the Continuous Reporting Portal.

3.2 Deliverable and Milestone Tracking

From Month 6 onwards, the progress of each WP will be monitored through bi-monthly online meetings involving WPLs, TLs, and the PC. Additional project staff may be invited when necessary. WPLs are responsible for ensuring the timely completion of activities, overseeing TLs and partner contributions, and providing the PC with a comprehensive WP status update.

This structured monitoring process helps identify potential challenges—including unforeseen obstacles—and mitigates risks of delays in workflow progression, output delivery, and the achievement of key project deliverables.

The PC, in coordination with WPLs, will ensure the timely completion of deliverables, milestones, and project outputs. The **Continuous Reporting Portal** will be used for tracking and submission.

Deliverables will be produced according to a bottom-up flow (as described in Section 4): TLs submit management reports or contributions to deliverables to their WPL, who, in turn, will integrate the material received and will submit a WP progress report or deliverable to the PC; finally, the PC will submit management reports and deliverables to the EC.

3.3 Risk Management and Contingency Planning

The PC will conduct ongoing risk assessments to track potential threats to project outputs and deliverables. These efforts will be carried out in close coordination with WPLs and TLs, ensuring appropriate mitigation strategies are implemented when necessary.

The MTB will be continuously updated on any deviations from the planned work schedule. If significant risks or issues arise, the PC has the authority to convene the MTB for immediate resolution.

3.4 Financial Monitoring and Compliance

For each reporting period, the PC—supported by the project's administrative and financial team—will collect and consolidate financial data from all partners to prepare the required Financial Statements.

Financial data will reflect completed WPs within the reporting period and will have been verified by each partner's administration to ensure eligibility, compliance, and alignment with allocated budgets.

4 Quality in Deliverables

Successful project management requires an integrated quality management system. This document establishes an independent quality assurance and self-assessment process within the Consortium that supports a consistent creation and evaluation of deliverables.

In order to ensure that each deliverable is of a high quality, each deliverable shall follow the quality assurance process. The quality assurance review is mandatory for each deliverable due in M8 or later, given the fact that deliverables due prior to M8 are mostly either the results of preparatory actions (planning, project-internal) or project management guidelines.

All deliverables requiring the submission of a report follow a template established at the beginning of the project. This ensures a consistent structure that facilitates both the creation and understanding of the presented sections. Before submission, each deliverable will be reviewed by the Project Coordinator (PC). All documents will be available in the project repository, in a dedicated folder.

4.1 Deliverable production

Deliverables have to be clear and concise about the objective. The rationale is to avoid very long deliverables because they are not readable and susceptible to losing focus. Moreover, it takes longer to write and review them.

It is of extreme importance to have a Table of Contents, a clear Executive Summary, an Introduction section outlining clearly the Purpose and Scope, and a Conclusions section; avoid repeating content from other documents (always use references for that) and synthesise, summarise and get to the point always.

The right size for a given deliverable depends largely on the topic, the objective, etc., but establishing a maximum size of 30 pages for dissemination/exploitation documents and 50 pages for technical deliverables. If a deliverable grows larger than that, then it must go an internal revision with the PC, before it can be submitted.

The following are the roles participating in the process of production of deliverables:

- Lead Author: is the main editor and leads the deliverable production process, being responsible for the submission of a high-quality deliverable in due time. The leader is also the main contact point with the other roles.

- Contributing Author: participates in the production of the deliverable by contributing with content and supporting the leader in producing a high-quality deliverable, addressing reviewers' comments and requests.

Each deliverable includes a revision history table that records the different versions created. This annotation is particularly important for deliverables that undergo progressive updates throughout the project's lifespan (e.g., Communication, Dissemination & Exploitation Plan, Data Management Plan, Promotional Kit, etc.), as well as for reports accompanying the release of successive tool versions. It is essential to track any modifications by specifying the date, the author, and a brief description of the changes made.

4.1.1 Official Submission of Deliverable to EC

On the official due date of the deliverable, the PC will make the official submission of the deliverable to EC in .pdf format. Submission will be done through the EC Participant Portal. The PC will also upload the submitted Deliverable in the folder AUTOMATA Workspace / Documents / Deliverables. Deliverables marked as public will also be published on the AUTOMATA project website.

5 Risk management

Risk management has the objective of avoiding or minimising the impact of potentially possible but unforeseen or unlikely external or internal events that change the likelihood of achieving the targeted outcome in projected time, quality or cost.

A critical element in a Research and Innovation Action project is the formal identification of risks, evaluation of their impact on both business environments and achievements of project goals. Risk processes include risk planning, risk identification, risk analysis, risk response and risk monitoring. The main foreseeable risks during the implementation of the **AUTOMATA** project were outlined in the DoA.

Given the interdisciplinary nature of the **AUTOMATA** project, a robust risk management strategy is essential to ensure smooth implementation and timely achievement of objectives. Risk identification, assessment, and mitigation are integrated into the project's governance structure, with continuous monitoring throughout its lifecycle.

A preliminary analysis of technological and experimental risks and contingency plans have been developed. While specific scientific and technical challenges are inherent to the research, the overall risk is assessed as low due to the strong expertise of the consortium members. The main risks identified and their corresponding mitigation strategies are as follows:

- **Obsolescence of the overall system**: The project employs cutting-edge technologies, and the consortium includes leading experts in the field, minimising the risk of premature obsolescence. Continuous technological assessment will be performed to adapt to emerging advancements (All WPs involved).
- **Challenges in developing a robotic working cell for handling archaeological artefacts**: The involvement of IIT, a leading European centre in robotics, alongside QB's expertise in robotic soft-hand technology, ensures risk mitigation through expert design and testing (WPs3 and 4).

- **Difficulties generating high-quality 3D models incorporating archaeometric data**: The expertise of UBM and its Archeovision Production branch, combined with UB's specific archaeometry background, strengthens the project's capacity to produce accurate and enriched 3D models (WPs 5 and 6).
- **Big Data collection complexities**: The participation of leading archaeological partners with extensive artefact collections, particularly INRAP, provides a vast dataset, ensuring data collection objectives are met (WP8).
- **Data management challenges**: ADS, UBM, and UNIPI have extensive experience in digital archaeology and data management. ADS is recognised as a world-leading digital archive (WP10).
- **Intellectual Property Rights (IPR) and licensing disagreements**: To prevent conflicts, the consortium agreement, established before project initiation, clearly defines principles for IPR and access rights (WP1, 13 and 14). The description will be detailed in D1.3 (due date M8).
- **Lack of interest from target audiences and stakeholders outside the project**: To mitigate this risk, stakeholders will be engaged early through targeted communication activities, workshops, and outreach initiatives aimed at raising awareness and interest within the user community. Furthermore, relevant stakeholders will be actively involved in crowdsourcing activities to ensure their participation and long-term engagement (WP11 and 12.

Risk management measures will be continuously updated as the project progresses, and mitigation strategies will be adapted as necessary to respond to emerging challenges.

Otherwise, the risk management process consists of a comprehensive risk assessment and action plan, which are repeated regularly during project execution to control risk factors. It implements mitigation wherever and whenever necessary. Not all events can be foreseen, but continuous monitoring will catch all events that endanger the project's success or the quality of the results.

The MTB and WPLs must evaluate and monitor the risks closely and regularly. New risks may also appear, and some others will be discarded because risks are dynamic. During the different typologies of meetings with MTB and WPLs, the PC will verify risk monitoring and contingency resolution and request feedback on analysis and mitigation for future risk assessment and allocation.

6 Change Management

A project of the size, complexity and duration of **AUTOMATA** may need to adapt to changes from within or from outside of the project. Changes might go from members leaving the Consortium, modifications in the DoA, adaptations of the CA and in the various deliverables.

The following guidelines outline the procedure to request and implement changes for each of the different cases.

6.1 Changes in Deliverables

Once submitted to the EC, deliverables are considered to be final, and no amendments are possible. However, if there is a need for change, then an amended version of the original deliverable might

need to be created and submitted to the EC. In this case, the PC checks and proposes the amended version to the MTB for approval. The changes are communicated to the PO for approval.

6.2 Changes in the Description of Action

Two main categories of changes of the text of the DoA are considered:

6.2.1 Changes without effect on the results or other contracted items

The procedure is the following:

- change requests prepared by the TLs have to be consolidated with the WPL and submitted to the PC;
- the PC checks and proposes the change to the MTB for approval;
- the changes are integrated into the next DoA amendment.

6.2.2 Changes with effect on the results or other contracted items

Changes that affect the overall results and objectives need the approval of the PO and require a formal cycle after agreement within the project.

The process for an amendment of the DoA is the following:

- change requests prepared by the TLs have to be consolidated with the WPL and submitted to the PC;
- the PC checks and proposes to the MTB for approval;
- the changes are communicated to the PO for approval;
- after approval, formal changes are integrated.

7 Intellectual Property Rights (IPR) Management

The **AUTOMATA** project follows a structured Intellectual Property Rights (IPR) management strategy to ensure clear ownership, access rights, and exploitation of project results. IPR management is handled under WP1 (T1.3) and WP14 (T14.3) and will be further detailed in a dedicated **IPR Management Plan (D1.2)**, scheduled for release in Month 8.

7.1 Principles of IPR Management

Following Horizon Europe regulations, the project distinguishes between:

- Foreground IPR: Intellectual property generated within the project.
- Background IPR: Pre-existing intellectual property owned by the partners before the project started.
- Sideground IPR: Intellectual property developed by partners outside the project's direct scope but during its duration

7.2 Access Rights and Licensing

Access to Foreground IPR is granted to all project partners:

- Royalty-free for internal research activities.

- Fair and reasonable terms for third-party research (subject to owner approval).
- Access to Background IPR follows the conditions agreed upon in the Background List.
- Any licensing disputes will be settled as per the Consortium Agreement.

To maximise impact and usability:

- Open Access and Open Science principles will be followed.
- Any software developed will be released under appropriate Free/Open-Source licenses (e.g., GitHub).
- Data generated within the project will comply with FAIR principles (Findable, Accessible, Interoperable, Reusable)

7.3 IPR Management and Exploitation Strategy

- An IPR Officer within the Management and Technical Board (MTB) ensures strategy implementation.
- The final IPR Management Plan will be integrated into the project's Exploitation Plan.
- SMEs involved in the project will have priority access to exploitation opportunities that align with their strategic interests.
- Legal requirements for commercialisation will be explored, including freedom to operate analyses, patent filings, and licensing strategies.

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The IPR strategy will be updated as the project progresses to account for new developments and ensure smooth technology transfer and commercial exploitation.

8 Conclusions

The AUTOMATA Management Plan establishes a comprehensive framework to ensure the efficient execution, coordination, and monitoring of all project activities. Defining clear governance structures, roles, and responsibilities provides a solid foundation for decision-making, risk management, and quality assurance throughout the project's lifecycle.

The plan outlines structured communication and collaboration mechanisms, ensuring effective interaction among project partners while facilitating engagement with external stakeholders and the broader research community. The risk management strategy enables proactive identification and mitigation of potential challenges, safeguarding project outcomes. Additionally, well-defined IPR management procedures will ensure the protection, accessibility, and sustainable exploitation of the project's results, with further refinements detailed in Deliverable D1.2 – IPR Management Plan (M8).

The management structure's monitoring, reporting, and quality control mechanisms ensure adherence to the highest standards. At the same time, the plan's flexibility allows for necessary adaptations in response to evolving project needs. The close coordination with ECCCH infrastructure via the ECHOES project further strengthens AUTOMATA's contributions to cultural heritage digitization, strengthening their impact and long-term sustainability.

The Management Plan will be continuously reviewed and refined as the project progresses to accommodate emerging challenges and opportunities. This will ensure that AUTOMATA achieves its ambitious objectives in a transparent, efficient, and high-impact manner.