

Final General Assembly Meeting WP3 – In-Kind Contribution Management

Mauro Zambelli, European Spallation Source ERIC
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Aim

Consolidate the success of BrightnESS, evolving the functioning In Kind system to establish an excellent basis for international cooperation inside the European Spallation Source ERIC

3.1

Consolidating and maturing the network of Hubs and IKC Field Coordinators

3.2

Refining co-working processes

3.3

Support the IKC projects through their life cycles

3.4

Quality management



Deliverables

D3.1	Agreed joint working practices	✓	M10 (M12)
D3.2	1st Annual IKC Progress Report	✓	M13 (M15)
D3.3	2nd Annual IKC Progress Report	✓	M25 (M26)
D3.4	Lessons learnt from IKC on ESS	✓	M30 (M31)
D3.5	3rd Annual IKC Progress Report	✓	M36 (M36)

Milestones

MS2	1st IKC Field Coordinators Workshop	✓	M04 (M02)
MS11	2nd IKC Field Coordinators Workshop	✓	M16 (M09)
---	Short IKC Field Coordinators Workshop	✓	(M14)
MS19	3rd IKC Field Coordinators Workshop	✓	M28 (M20)
---	4th IKC Field Coordinators Workshop	✓	(M42)

brightness² This is IN-KIND...

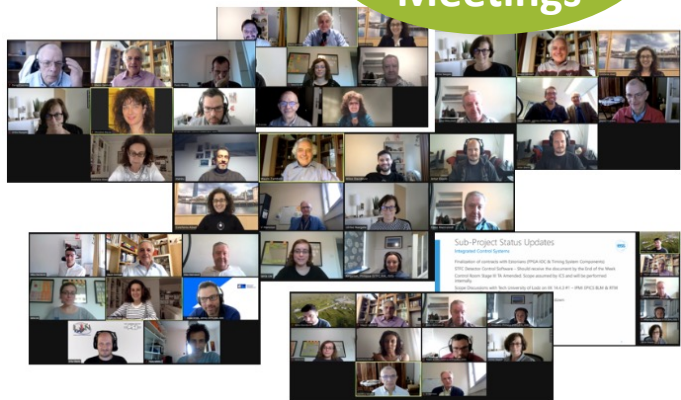


BrightNESS² is funded by the European Union Framework Program Research and Innovation Horizon 2020, under grant agreement 8.

➤ Maturing the Network of Field Coordinators

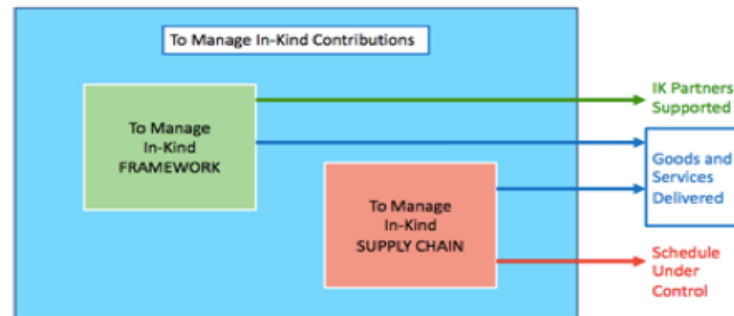
- Attendance to ESS Boards and Committees (e.g. In-Kind Review Committee, Administration and Financial Committee, Sub-Projects Collaboration Boards), often as formal delegates of the respective Country or Institution
- Appointment to specific positions, like in the case of vice-chairmanship of the In-Kind Review Committee, where both in the past years and for next two ones the position was and will be held by two different Field Coordinators
- Participation in the national bodies like local Program/Project Offices
- Connection with Research Ministries and Agencies
- Responsibility of coordination of the delivery of IK Contribution from their own Institute/Country
- Supervision of the realisation, assembly, installation and commissioning of specific equipment/systems both at the national labs and at ESS central site

FC/IK
Biweekly
Meetings



➤ Refining co-working processes

- ✓ *Change management;*
- ✓ *Handover of QA documentation;*
- ✓ *QA exception/issue tracking and resolution;*
- ✓ *Process to receive deliveries from IKP (i.e. from shipment to transfer of ownership and including insurance etc.);*
- ✓ *Documentation associated with CE marking, especially design files;*
- ✓ *Definition of rules for guarantee period and maintenance of equipment.*
- ✓ *Spread best practice, e.g. by a lesson learnt document;*
- ✓ *Support mobility of staff between partners and ESS support ESS to establish procedures for mobility of partners staff during the operation of ESS;*
- ✓ *Support with exchange of staff during the build which will help operations.*



➤ XRM+ as a tool to support IK Management processes

Pages **XRM Home** Edit

Created by Daniel Filis, last modified by Mohamed Ahmed Al Abdelhateh on Sep 16, 2021

XRM++

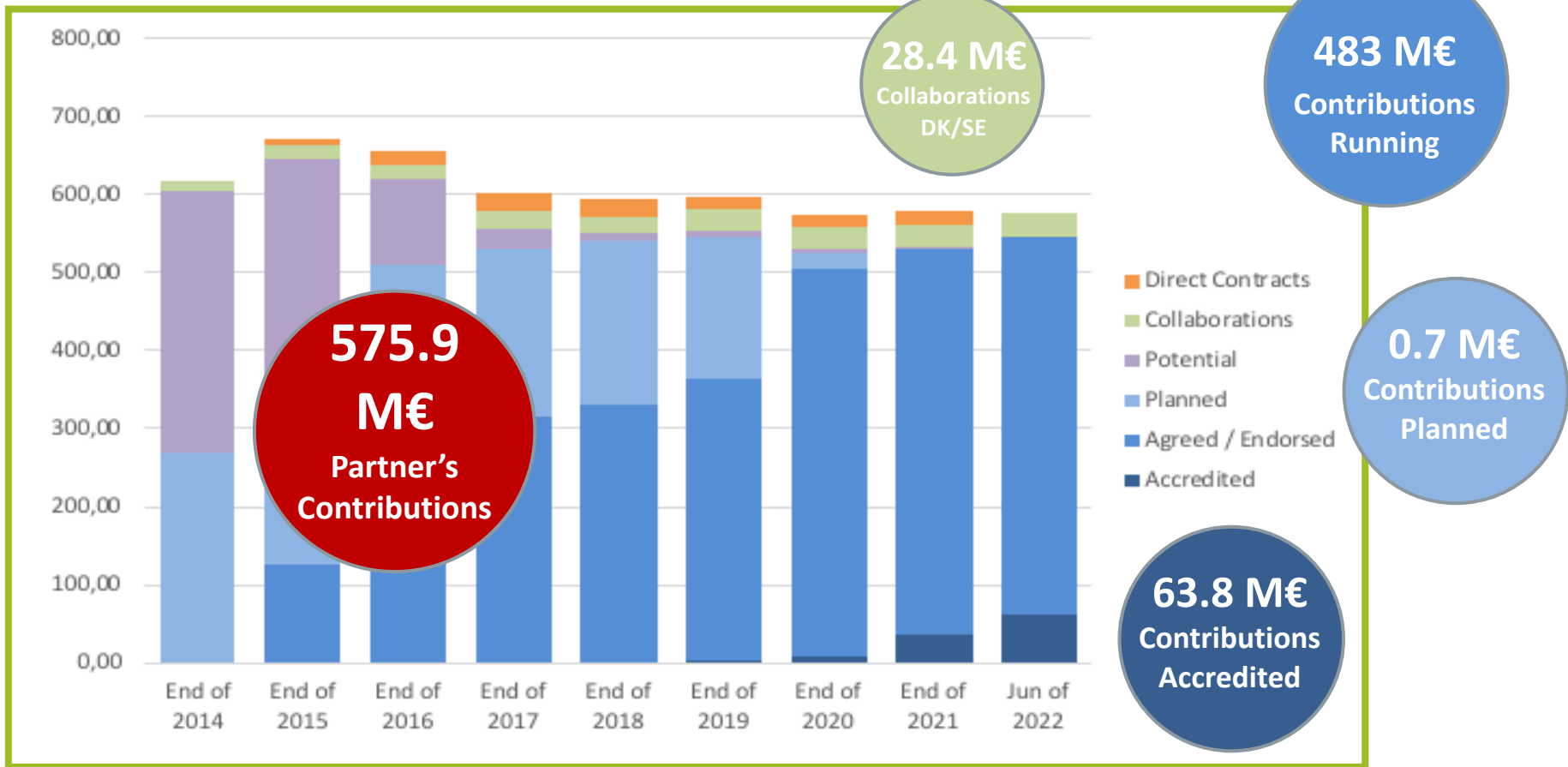
- In-Kind Contributions**
Planned or agreed In-Kind Contributions
 - Signed In-Kind Agreements
 - Technical Annexes
 - Deleted Technical Annexes
- Call-Offs**
Information on country call-offs
 - Germany
 - Hungary
 - Norway
 - Switzerland
- Reports**
 - Easy BI Country Graphic
 - TAs summed per country
 - TAs summed per project
 - Individual IKC Status - Quarterly IK Report
 - IKC Amendments - Quarterly IK Report
 - TAs, Amendments & Final Reports Endorsed per IKRC
 - TAs, Amendments and Final Reports Approved per ESS Council
 - Milestone Report
- Countries**
In-Kind information per country
 - Read more

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brightness² In-Kind at ESS: Administrative Progress



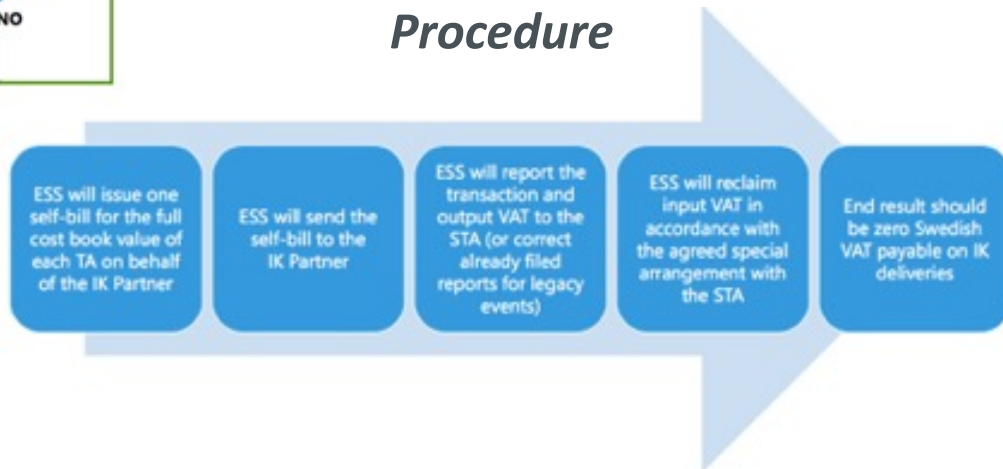
➤ Support IKC projects through their life cycles

- ✓ *Logistics: transportation of in-kind components, including advice on taxes and duties, insurance etc.*
- ✓ *Acceptance tests on the IKC (such as for example Site Acceptance Test – SAT)*
- ✓ *Final reports on the in-kind work packages as required by the Technical Annexes (TA)*
- ✓ *Installation of the in-kind deliverables*
- ✓ *Transfer of ownership between IKC Partners and ESS*
- ✓ *Commissioning*
- ✓ *Global integration of IKC at the ESS and initial operation of IKC*
- ✓ *Ensuring alignment of partners' time schedules with those of ESS's P6 master schedule*
- ✓ *Liaison between partners and industry to help resolve issues during the procurement phase;
" Follow up for areas such as creation of user manuals and operations documentation.*



IK VAT Self-billing Procedure

IK Personnel Secondment Decision-Tree



➤ Task 3.4 – Quality management

- ✓ *The Field Coordinators mediated between ESS (with existing high-quality standards) and the Partners (which must comply to the same standards). Agreements have been reached on the right nature and level of documentation, tailored to each deliverable. Support was granted to reach the right validation methodology, to help ensure the whole quality certification, as well as a good tracking and storage of the data generated in ESS's document management system*
- Continuous cooperation with ESS Quality Division in order to support the IK Partners with all issues related to quality control and quality assurance of IK contributions
- Support to the Partners toward the full compliance of equipment to the European Directives and the possible CE marking
- Support for hazard identification, risk evaluation and mitigation, for In-Kind Contributions, installation and commissioning activities

➤ Task 3.4 – Quality management

- Implementation of workable practices applied to In-Kind equipment, with the objective of preparing, as applicable, the Declaration of Incorporation (DoI), Declaration of Conformity (DoC) and CE marking
- Activity of benchmarking for studying and comparing equivalent activities in other major research infrastructures, with particular reference to CERN (online workshops in 2021 and 2022 with CERN and ESS experts to discuss the compliance of scientific equipment to the applicable European Directives)



Quality Requirements

Mechanical Quality Classes

	Manufacturing	Installation and operation / maintenance				
Safety SSC	MQC1	30M Special conditions for ESS in Lund				
	MQC2	Code RCC Alpha				
	MQC3	ESS requirements				
Safety Restricted SSC	MQC4	<table border="1"> <tr> <td>PED 2014/54/EU AFS 2016-1</td> <td>PED 2014/68/EU EN 13445, EN 13480, EN 13458</td> </tr> <tr> <td>EN 13445, EN 13480 EN 13458</td> <td>AFS 2017-3</td> </tr> </table>	PED 2014/54/EU AFS 2016-1	PED 2014/68/EU EN 13445, EN 13480, EN 13458	EN 13445, EN 13480 EN 13458	AFS 2017-3
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EN 13445, EN 13480 EN 13458	AFS 2017-3					
None Safety						

SSC – Structure, System Component

brightness² WP3 - Results for Impact

- Given that WP3 could address neither the technical challenges nor the delivery schedule of the ESS Project, it represented an invaluable asset in order to:
 - *Facilitate the preparation and finalization of IK Contribution contracts (IK Contribution Agreements and Technical Annexes);*
 - *Ease the communication between the ESS central site and the IK Partner Institutions, as well as between the IK Partners themselves;*
 - *Share lessons learnt and most appropriate best practices;*
 - *Support the delivery of IK Contributions from the Partner Countries to the ESS site in Lund, and this through the supervision of the realization activities at the IK Partners labs and at the industrial subcontractors, as well as dealing with administrative and logistic issues connected with the transfer of goods to Sweden;*
 - *Rapidly deal with and solve any issues occurring between the Partner Institutions and the ESS Central Site.*



- The second half of BrightnESS² was deeply characterized by the difficulty of travelling and meeting in person owing to the COVID-19 pandemic. Consequently, meetings in person like the ones held during the first year of the Grant were impossible to be planned for most part of the period 2020-2022. Actually, the physical meetings attended by the IK Management staff and Field Coordinators in the years 2020-2022 were the following:
 - *BrightnESS² General Assembly, and IK Group/Field Coordinators Workshop, (Brussels, February 2020);*
 - *ILO Strategy Meeting (Catania, February 2020) in the framework of the collaboration between WP3 and WP4.*
 - *BrightnESS² General Assembly and Final Event in Lund (June 2022).*
 - *Fourth Field Coordinators Workshop and ESS site visit (June 2022).*

- Dissemination activities continued on-line during the pandemic . A number of events were either organized in the frame of Work Package 3 or attended by ESS IK Management staff and Field Coordinators, which include, but are not limited to the following:
 - *The 3rd Field Coordinator “Building on Best Practices Workshop”, held on line on August 27, 2020, with a thorough discussion and analysis of Lessons Learnt and Best Practices.*
 - *Two Mech Forum meetings organized by ESS, May 2021 and February 2022.*
 - *Involvement of Field Coordinators in the four IK Partner Performance Surveys (May 2020, March 2021, August 2021, April 2022).*
 - *Thematic workshops for the IK Partner Institutions on specific topics: VAT issues on IK Contributions (May 2021), Secondment of IK Personnel and personal tax liability in Sweden (September 2021).*
 - *Thematic Field Coordinators Biweekly meetings: Logistics at ESS (October 2020), Geometrical Product Specifications (April 2022).*

WP3 - Sustainability after project end

- Many results obtained during BrightnESS² in the frame of Work Package 3 have a permanent characteristics, which include, but are not limited to the following:
 - *All the IK Contracts (IKCAs and TAs)*
 - *Processes and procedures for managing administrative and legal issues like VAT, Personnel Secondment, ownership transfer, work permits*
 - *Optimization of IK Management processes*
 - *Quality Assurance and Quality Control procedures*
- One of the major aspects to ensure that the work package objectives remain sustainable after the end of the project is to maintain and reinforce the collaboration in the frame of the Network of Regional Hubs
 - *The proposal for a new collaborating project has been submitted in the frame of the Horizon Europe programme - NextGNeuS, “Innovative concept for a powerful network of Next Generation Neutron Sources”, with Work Package 2 “RI Networks” which addresses the continuation and strengthening of the present Network of Field Coordinators*



mauro.zambelli@ess.eu

<https://confluence.ess.lu.se/display/IKM/Build+on+Best+Practices>

Thank you!