Project Review Guidelines

Version 12, dated August 2015

Foreword

Make sure that you are using the latest version of the Guidelines & Template: check it on the "Documents & Templates / Guidelines & Templates / Reviews tab" area of the ITEA Community website (https://itea3.org/community) and, whenever needed, discard obsolete versions you might have stored and download the up-to-date one. For help on the ITEA Community website, refer to the "Community website introduction" document available on the ITEA website (https://itea3.org/call-documents.html).

1. General principles

1.1. Review objectives

Project reviews are essential to the ITEA Programme Management as they ensure the high quality level of ITEA labelled projects. They are used to monitor the progress of the projects, evaluate their quality and, whenever needed, recommend actions and/or changes: they serve as an efficient tool to steer projects and help them to define and meet realistic yet challenging exploitation goals.
From a project point of view, ITEA reviews are a supporting tool to achieve a core target: delivering a well thought-out and high quality innovation to generate strong impact on the market. The ITEA target is to stick to the market, thus beside the Change Request process the review is also a tool to analyse the continuous required project changes to follow the market evolution.

Reviews should be considered by project consortia as a valuable feedback that focuses on their own interests: questions and remarks from experienced reviewers are meant to trigger the right actions, to focus on the right issues, to ensure that technological considerations do not eclipse market evolutions and trends. Hence, if a project has encountered any issues, it is in the consortium's interest to mention them and to profit from the reviewers' recommendations. Do not focus on day-to-day management, but focus on objectives, achievements, issues, identified or potential risks, and related actions and/or contingency plans.

1.2. Planning and Costs

The review is scheduled by the ITEA Office together with the main participants (i.e. reviewers, chairman and project partners) to ensure their availability. Date and location are chosen by the ITEA Office based on a number of criteria:

- in order to optimise travel costs, often two reviews are planned at the same location (city) for two consecutive days; the first review is scheduled in the afternoon of the first day and the second review in the morning of the second day. The exact start and end times are defined by the project coordinator;
- at least one reviewer that has monitored the project from the beginning is assigned (whenever possible);
- a specific location may be set on the request of project leader, e.g. for specific location-dependent demos, in particular for the final review.

The review location is initially defined as a geographical area close to the location[1] indicated in the annual ITEA review calendar. Organising and reserving the precise meeting room is the responsibility of the project coordinator.

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[1] *For instance, a review in Paris could take place within Paris intra muros, or at La Défense, while a Stockholm review could take place in Kista, and a Helsinki review in Espoo (these are typical examples). We strongly recommend selecting a review location that is both close (or within) the main city and easily accessible from the airport, with accommodation capabilities nearby.*

The costs[2] of a review are borne by the project consortium. Reviews are usually planned after each year of the course of the project, which generates two or three reviews in the lifetime of an ITEA project, including the final review. The intermediate reviews aim at supporting and steering the project towards success, while the final review both evaluates the whole project achievements and supports the consortium with regards to the exploitation opportunities by providing advice and suggestions (cf. §3.2 for more details).

1.3. Confidentiality

All participants that are not members of the project consortium will have signed a Declaration of Non-Disclosure beforehand. Consequently, the ITEA Office will make sure it receives (at the latest two (2) weeks before the review meeting) a Declaration of Non-Disclosure (DND) from any external expert assigned by the Public Authorities (PAs). The duly signed DND will entitle the experts to access to all project documents needed for the review.

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[2] *Reviewers, Public Authorities and ITEA Office members take care of their own travel costs; all other costs are the responsibility of the project consortium.*

2. Review organisation

The reviews are organised by the Project Leader (PL)[3] with the support of the assigned project mentor. The precise assignment of tasks between the PL and the mentor is not predefined; the PL has the responsibility of properly organising his/her project reviews and contacting the project mentor whenever needed.

2.1. Mentorship

Each project has an assigned mentor, selected among STG members and appointed according to the following rules:

- if ITEA Founding Companies (IFCs) participate in the project, then the STG representative of the most relevant IFC (i.e. the one ensuring the project lead, or with the most significant contribution) is selected;
- if no IFC participates in the project, then the decision is based on expertise or geographical proximity.

The mentor's role is to support and advise the PL in preparing the review meetings (including the rehearsal meetings, cf. §2.3), coordinating the logistics when several reviews take place at the same place on the same or consecutive days, and more generally in carrying out the project. The mentor support has often proved to be essential when the PL is new to the community.

2.2. Attendees

The review meetings imply the participation of core project partners, i.e. at least the project coordinator (PL), all relevant work package (WP) leaders and all key members of the project consortium[4]. It is however strongly recommended to limit the participation to a selected set of 10-15 key project representatives, to avoid densely crowded meeting rooms and significant travel expenses, except in specific cases (e.g. large crew needed for a key demonstration).

For evaluation and support purposes, a set of reviewers is also selected for each review:

- a review chairman: he/she is either the ITEA Vice-Chairman or the ITEA Chairman;
- two (2) reviewers from the STG, and from companies not participating in the project[5]; at least one of the two reviewers will have monitored the project from the start and participated in the initial FPP evaluation and/or earlier project reviews (whenever possible); a third reviewer, called spare reviewer, is also assigned, in case one of the two main reviewers should have to cancel his/her participation; his/her availability is guaranteed until one month before the review;
- an optional external expert, assigned by the ITEA Authorities Committee (ITAC), and acting on behalf of the Public Authorities (PAs) of all the countries funding the project; the

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[3] A.k.a. project coordinator.

[4] A key project representative may be excused if (s)he can be replaced by a third person with the appropriate level of knowledge on the project, its innovation, business targets, current achievements and issues.

[5] This is done to avoid conflicts of interest. As a consequence, a mentor cannot act as reviewer.

external expert is a full member of the review team; his/her comments are taken into account in the ITEA review process as for all other reviewers[6];

▪ one of the two ITEA programme coordinators, acting as secretary of the meeting;

▪ the local[7] PA representative, if available, and if local partners are funded; as all funding PAs cannot attend, before reviews the ITEA Office contacts all the relevant funding agencies and thereby collects potential country specific questions that will be asked to the project partners at the appropriate time during the review.

The project mentor is also invited to attend the review meetings.

The precise list of reviewers' names is available in the review calendar item on the ITEA Community website, and will also be provided by the assigned programme coordinator. Email addresses will be provided sufficiently in advance to send the review invitations (cf. §4.2).

2.3. Schedule

To allow the reviewers to optimise their travel schedule, morning reviews should end at 1pm latest, while afternoon reviews should start at 1:30pm earliest.

A review should typically last no more than four (4) hours, including breaks and questions during or after the presentations.

Good, appropriate time management is essential, with no drift in the meeting agenda: since some of the reviewers might have time-critical journeys, it is crucial to start and end the meeting according to the schedule agreed upon beforehand. The consortium needs to take into account some additional time for the reviewers' questions, and not only the sole presentation time: we recommend considering not less than thirty (30) minutes of additional time due to the reviewers' questions and the corresponding answers. The presentations should be adapted accordingly, by avoiding an inadequate number of slides; the recommended time per slide is a minimum of two (2) minutes – consequently, a presentation of 195 slides would take close to 6.5 hours (breaks excluded) if every slide is sufficiently well presented – and the overall presentation time would reach 7 hours when considering the 30 minutes reserved[8] for the reviewers' questions. As a consequence, a typical review session would take 195 minutes until the reviewers' private session[9], including a 15-minute break and a maximum of 75 slides[10].

To ensure the review proceeds flawlessly, it has always proved to be beneficial to plan a rehearsal meeting, with the mentor support, preferably one week before or, at worst, the day

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[6] *The ITAC may still (or may not) request to the external expert a specific report for further details and analysis; it is then a private communication between the assigning Public Authority (or the whole ITAC) and the external expert.*

[7] *I.e. from the country where the review takes place. Please note that a PA from another country may still join if he/she expresses the wish to attend the review.*

[8] *The agenda should not contain a specific timeslot for the reviewers' questions, as these questions may be asked at any moment during the presentations and demonstrations: therefore, the 30 minutes for reviewers' questions and corresponding answers have to be integrated in the whole presentation time of the meeting agenda.*

[9] *Leaving 30 minutes for the reviewers' private session, 10 minutes feedback and 5 minutes for final words, cf. § 3.1.10 to §3.1.12.*

[10] *When considering the 15-minute break and 30 minutes of reviewers' questions (and associated answers), 150 minutes of presentations are remaining, hence the 75 slides (2 minutes per slide).*

before the review: this proves very helpful in checking the overall timing and clarity of the core messages.

The main content of the slides should not be an extensive description of what the project has done on a daily basis but rather a presentation of the actual results on innovation and potential business impact.

2.4. Amenities

The meeting room should be chosen so as to fit the number of expected attendees and to provide the appropriate features: big visible screen for the projection of the presentations, beamer with at least VGA (and preferably VGA and HDMI) input, sufficient power line sockets for laptops[11], etc.

The PL will make sure that the meeting room is ready and open in due time (at least 30 minutes in advance), the beamer connected and working, the power line sockets available and actually powered, and that enough adjacent seats are kept free for the attending reviewers. Besides, it is a courtesy to the reviewers to provide them with wireless internet access.

The presence of refreshments is appreciated. The availability of lunch before or after is at the full discretion of the project coordinator.

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[11] *The PL needs to consider that there might be up to six reviewers seated closely together in the meeting room, each one potentially requiring a power line socket at a maximum of 2 metres from his/her laptop.*

3. Presentations

Most of the review is based on partner presentations and demonstrations that aim to illustrate the key achievements, the key success factors and the exploitation strategy of the consortium.

3.1. Meeting structure and content

This chapter presents a typical[12] project review meeting agenda. It also details what the reviewers expect to get as information, and how the consortium should focus its presentations.
The consortium is invited to check the feedback (remarks and recommendations) of all previous reviews, including the Full Project Proposal (FPP), Change Requests (CRs) and Project Progress Reports (PPRs) evaluations as well as the Conclusions & Actions (C&A) of previous reviews if there were any. The consortium should try to implement the recommendations, and to illustrate implicitly during the review how they did so, i.e. which actions have been made to steer the project accordingly. Previous actions and recommendations that are ignored will resurface and be reinforced.

3.1.1. Introduction

After a quick pre-introduction by the PL, indicating that the review has begun, and which may include a very brief introduction of the main attendees, the review chairman makes an introductory speech of five (5) minutes, summarising the main expectations and targets of the review.

3.1.2. Overview of the project

The consortium should provide a brief overview lasting ten (10) to fifteen (15) minutes recalling the main project objectives and challenges with reference to the State-of-the-Art (SotA), the work plan (e.g. milestones) and key results of the project achieved so far as well as those targeted for the upcoming period. What refers to the past, the current and the upcoming periods should be clearly stated during the whole review.

It is also recommended to include here a brief presentation of each key partner[13], indicating its size (employees and turnover), its main products / services and its main markets and customers (when needed by focusing on what's relevant to the project scope, especially for large industries targeting various markets). Key partners include the project leader and work package leader entities, as well as potential end-users and exploitation-oriented partners (vendors, service providers, etc.).

Profit from the overview to introduce the acronyms that will be mentioned in the presentations; do not make the assumption that projects or even domain-specific acronyms are known by all reviewers (especially as some acronyms can have several meanings).

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[12] The consortia are free to propose a different structure as long as all aspects are sufficiently covered. For instance, §3.1.5 and §3.1.6 could be reverted, with first a short introduction of the demonstrations, then striking demonstrations showing the latest achievements, and finally a presentation of how these results have been achieved and which market and technology opportunities are generated.
NB: when preparing your agenda, ensure that speakers coming by plane (esp. from far away, e.g. Korea) do not have presentations at the end of the review.

[13] The company description can obviously be discarded for very well-known companies, e.g. IFC or similar companies.

3.1.3. Managerial topics

All potential management issues should be mentioned here, including any evolution in the consortium, in the funding status or in the costs and effort. The Project Cooperation Agreement (PCA) status (in discussion / signed) must be clearly indicated. The PCA is expected to be signed before the first review takes place. If the PCA is not yet signed, a clear explanation for the delay should be provided, as well as an expected date for the PCA signature.

The level of cooperation within the consortium may be underlined and clarified: in particular, the level of international collaboration should be clearly presented and underlined. The cooperation with other projects (EUREKA, IST, FP7, H2020, national, etc.) should be mentioned.

3.1.4. Global picture, key objectives and impact on quality of life

The consortium must present a convincing global picture, which explains what the main goals are, why they are relevant, how they will be achieved, how far the consortium is from achieving them. Whenever possible, quantified progression measures and estimations should be provided.
The global picture integrates an up-to-date (i.e. whenever relevant: an updated) market and economic relevance analysis, together with an up-to-date competition analysis. Summarise shortly if anything has changed since the last review; it is suggested to allocate from ten (10) to fifteen (15) minutes for the market analysis.

In addition, consortia are strongly encouraged to present, as part of the global picture, the impact on quality of life they expect from the project, as it represents a strong value within the ITEA Programme. This impact can be on improving healthcare, proposing entertainment, facilitating various daily burdens, increasing security, promoting a sustainable economy, optimising resource and energy management, reducing the ecological impact of human activities, widening the access to knowledge, improving wealth, etc.

3.1.5. Key achievements

Among the main objectives of ITEA reviews are the presentation and evaluation of the consortium's key achievements. The consortium should focus on quantified achievements and on innovation, with a clear difference between:

- what comes from the SotA (use the ITEA Living Roadmap as a reference and complete it when necessary),
- what is an off-the-shelf component (third party contribution, e.g. open source components developed outside of the consortium),
- and what is a contribution by the project,

ensured at all times. For follow-up projects, it is essential to position the new project deliverables before those delivered during the previous project(s).

The results may typically be presented per WP. Details on each and every technical progress do not need to be provided: the focus should be on every key achievement that brings the consortium closer to its exploitation objectives. A presentation of a few highlights of the most relevant deliverables is appreciated, but the focus on key results should be maintained. Besides, it can sometimes be relevant to illustrate the innovation and contributions through clear (and, if needed, simplified) examples, e.g. problems it can solve that had not been so easy to solved before, or optimisation it provides, etc.

In order to focus the review on actual innovation and/or market-oriented achievements, the PL is free to decide to skip a whole WP, typically if everything had already been presented at the previous review, if the WP has not yet started or if there is no key achievement yet in that WP: repetitions from a review to the next one should be avoided, especially on a technical level. As a consequence, a detailed task-listing can (and should) often be avoided and saves time, e.g. for the demonstrations or exploitation prospects.

3.1.6. Demonstrations

Demonstrations are the most striking way to illustrate the achievements: the consortium should showcase them well, and leave enough room in the planned agenda for both the demonstrations themselves, their introduction (e.g. with explanation slides, before running the demonstrations – a demonstration only exploits its full potential when all attendees perceive what is at stake and which contributions are shown) and the associated reviewers' questions.

Demonstrations are very welcome at the first review, and are mandatory for following reviews. Besides, it is essential that the consortium prepares its demonstrations well and makes the required adjustments during the rehearsal meeting, in order to avoid the so-called "demo-effect".

3.1.7. Progress status

A short summary of the overall work plan progress must be presented, including the evolution of the consortium positioning with regards to the current (evolving) SotA, the status of all project milestones and deliverables, as well as a table indicating the actual spent human resources figures in person-years (PY), per partner and per year, with a comparison between what has been spent and what was initially planned. Note that the PY spent figures must compare what has been spent until the review with what was initially planned[14] at that same date (not the whole project), so as to be able to identify any drift both in the agenda (which gives an indication of when the final results might be achieved) and in the workload (i.e. effort, which indicates if the planned work has been under-, well or over-estimated).

3.1.8. Exploitation

As core target of any ITEA project, the exploitation prospects and the associated dissemination and standardisation strategies and actions have a central role and should be underlined in detail, yet in a realistic way, by project partners.

Dissemination and standardisation must be seen as exploitation enablers (not as objectives on their own[15]) and should consolidate a larger exploitation strategy:

- If standardisation is not needed for exploitation, then the consortium can just explain why it is not needed, and should not spend more time on standardisation. If standardisation is

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[14] I.e. what was planned when the latest review took place, or what was planned when the project kick-off took place, if there is no previous review.

[15] Some (rare) projects can have standardisation as a core goal, but this goal aims at achieving a greater goal (e.g. enabling a market to take off by ensuring all key players are interoperable, which enables the end-user adoption) which should be presented.

needed to achieve actual successful exploitation, then the consortium should detail which specific actions it is taking to achieve standardisation[16].

▪ Dissemination is about ensuring that future business partners, customers and end-users are aware of the project achievements and results. As such, each dissemination activity should be presented as a means to achieve an exploitation goal and should be put in that perspective[17].

The consortium must present its strategy, as well as the activities carried out in the past period and planned in the coming one. Fast, mid-term and long-term exploitation opportunities must be differentiated. It is strongly recommended to avoid generic exploitation statements[18] and to focus on tangible and detailed exploitation prospects, in terms of planned products / services, clear identified customers and deployment timeframe. NB: fast-exploitation refers to actual exploitation that takes place before the project ends or that will definitely take place just after the project closure[19].

The kind of results that may be exploited encompasses new products, product upgrades, software packages, methodologies, patents applications or Intellectual Property Rights, licences, new standards, published APIs, open source software, etc.

The presentation related to exploitation should last at least fifteen (15) minutes, and provide quantified results, activities and targets, i.e. (realistic) figures whenever possible. A synoptic sheet with quantified progress should be presented, including the current number of exploitations[20] (new products, upgrades, packages, etc.), standardisation actions, disseminations (customer-oriented actions, conference talks, papers, webinars, etc.), patents, spins-offs and start-ups, and public SotA documents[21].

3.1.9. Synopsis: consortium's conclusions

The consortium is invited to present a short conclusion, stressing in particular the main innovations of the project results and their expected impact on the market.

3.1.10. Reviewers' private session

The reviewers' private session aims at enabling reviewers to share their evaluations and recommendations: they meet in the meeting room without any project consortium member to share their comments and jointly prepare the Conclusions & Actions (C&A) document to be presented as common comprehensive and synthetic feedback to the project consortium, in the concluding session.

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[16] Just mentioning the standardisation bodies that project partners are in is insufficient and not fully relevant: what matters are standardisation activities that change things and that are deeply related to the project goals.

[17] While publications are good for disseminating scientific knowledge, the dissemination should not be limited to papers, and should actually focus more on targeted communications, e.g. workshops with end-users, presentations to foreseen customers, etc.

[18] E.g. "this partner will continue improving its technologies and will enhance its product portfolio thanks to the project".

[19] For instance, a first product update already sold to a customer, a standard deployed by the consortium to manufacturers and providers, or a service / consulting agreement with end-users confirmed for the next two years, etc.

[20] It usually is at zero at the first review, and ideally is strictly positive at the final review.

[21] These SotA documents should be finalised and uploaded on the ITEA Community website as WP deliverables.

The review chairman has the responsibility to reach consensus among all reviewers (including the external expert); if no consensus can be reached and a discrepancy remains, this output will be stated in the reporting document (C&A).

The project mentor is allowed to participate in the reviewers' private session, but has a limited and constrained role: his main role consists in providing additional information to the reviewers in the event of questions or uncertainties, and in explaining later the feedback outputs to the project consortium. He/she will by no means attempt to influence the review outputs and will keep the personal position of each reviewer confidential.

This agenda item should be blocked in for a timeslot of thirty (30) minutes.

3.1.11. Reviewers' feedback session
The reviewers' feedback session, which lasts ten (10) minutes, summarises the draft C&A by underlining the main outputs of the project review. The presented C&A may be updated after the meeting by the attending reviewers, especially with regard to deliverables. The final C&A document is normally sent to the PL one to two weeks after the review[22].

3.1.12. Final words
The review ends with some final words from the review chairman, stressing the main advice and future challenges for the project consortium.

3.2. Specific focus of each review

All reviews should provide the elements described in §3.1. However, the timeslot length of each agenda item should be adapted[23] to both the amount of information to present and the reviewers' expectations, detailed in this subsection.

3.2.1. First review
The consortium should focus on the changes with regards to the initial FPP (if there have been strong changes, the consortium should explain why and how the updated project remains relevant), quantified objectives (e.g. clearly described targeted performances, and any other relevant KPI), a crystal-clear description of the actual proposed innovation, as well as on the technical progress achieved in the first year of the project.

In addition, the first review should also focus on the partner plans to have a real impact on the market: what is targeted, and how do partners intend to achieve this goal?

3.2.2. Intermediate review(s)
The intermediate review(s) should focus on the technical progress, the current achievements and the revised plans for the future. Demonstrations should have a significant timeslot.

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[22] *Although this C&A will be the only written feedback provided by the reviewers, the PL and project partners can also contact the ITEA Office (e.g. the attending Programme Coordinator) for further details or recommendations.*

[23] *Except when indicated otherwise, i.e. when a timing recommendation or specification is provided in this document.*

Each company should also present clear exploitation prospects: new / impacted products and/or services, clearly identified customers, estimated TAM[24] and targeted market share, actual strategies being implemented to achieve these goals.

3.2.3. Final review

The final review should focus first on the project results and achievements, with a significant timeslot dedicated to demonstrations. The consortium should relate the achieved results to the initial objectives, and should quantify the achieved innovation in terms of market impact potential: how differentiating is the developed technology compared to market competitors? Which competitive advantage does it bring to the partners?

Remaining fields for improvement and potential follow-up actions (not projects) can also be mentioned to bring perspective to the overall achievements.

Companies also have to present concrete and detailed exploitation strategies to access the market (cf. second review, but with the currently achieved results and updated concrete plans for the upcoming periods).

The consortium should also present who will benefit from the project outputs, and how the knowledge is shared, disseminated and transferred among partners[25] (e.g. through PhD students being hired by industrial partners).

3.3. General recommendations

In terms of content, the consortium is advised to focus on key and quantified elements, both for objectives, results, overall progress and market prospects.

In terms of form, the slides must be reviewed internally (i.e. by the project consortium) to ensure their clarity: their fundamental aim is to support the verbal presentation, not necessarily report or be read as independent deliverables, so avoid overloaded slides and dense texts as much as possible: charts, graphs and other visual representations often provide improved clarity for attendees as well as a much better support for the presenter him/herself. Overall, avoid generic declarations: be focused, clear, precise and to the point.

The rehearsal meeting should be used to ensure that the key messages are clearly identified and well transmitted to the audience, that the presentation length is appropriate so as to ensure strict time management and that demonstrations are well mastered[26]. Teleconference solutions (via professional systems or via consumer-software like Skype) must be avoided as much as possible[27].

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[24] *TAM: Total Accessible Market.*

[25] *The availability of highly-skilled experts in strategic knowledge fields for companies to hire is a strategic consideration for many countries and industries when considering mid- to long-term growth.*

[26] *For instance, for real-time demonstrations, the partners need to ensure the robustness is sufficient and the repeatability is good enough; for video-based demonstrations, appropriate codecs and video players must be installed to avoid that computers need to be switched, that videos are not displayed on the projector, and that they are not played in full-screen mode.*

[27] *Unless full HD video and sound, as well as clear signal quality and connection robustness, can be guaranteed, which requires a large and stable bandwidth as well as a high quality installation on both ends. Exceptions can be considered for partners from outside Europe: the PL should then contact the programme coordinator assigned to the review, for advice.*

4. Review preparation period

This chapter presents all the tasks and actions the PL (together with the assigned mentor) should take into consideration in the months to weeks before a given project review. All mentions of online data (or webpage) directly refer to the ITEA Community website, and more particularly to the project review agenda item webpage. This review page is accessible by clicking on the review item in the online calendar, on the ITEA Community website. For any question or difficulty in accessing this page, please contact the assigned programme coordinator.

All indicated dates (e.g. "two weeks in advance") are deadlines, i.e. the corresponding actions should be taken by that date at the latest. However, it is not recommended to take these actions too early in relation to these deadlines.

In any case, project partners (and in particular the PL) should check the ITEA Community website for the latest online version of these review guidelines and discard obsolete versions that may have been downloaded and stored.

For any other aspect such as those listed in this document, or any additional question, the PL should contact the ITEA programme coordinator assigned to the review.

4.1. Project conformance: two months before

The PL is responsible for checking two months in advance (at the latest) the conformance of the project data on the ITEA Community website (as well as the latest validated FPP available online), including:

- the list of active partners (some partners may have left or may have integrated during the project),
- the start and end dates of the project,
- the costs and effort per partner, WP and year,
- the funding status per partner (to be checked with the programme coordinator in charge of funding statuses – any change since the last review, or project kick-off if it is the first review, should be notified to the ITEA Office),
- the milestones,
- the detailed scope of the project (which could be impacted by some partners leaving or entering the consortium),
- etc.

In other words, the latest submitted FPP (including updated FPP through a CR) must describe the project exactly as it is at that moment. In the event of discrepancies, the PL should prepare a CR to update the reference FPP and should submit it one month before the review at the latest. This will help the reviewers to comprehend the changes in the project, and the consortium to focus on achievements and targets during the review.

The necessity of submitting a CR may be discussed with the assigned programme coordinator, who will confirm or remove this obligation.

4.2. Invitation: one month before

In order to facilitate flight and hotel bookings, the PL (or the assigned mentor) should send an invitation for the review, at least one month in advance, to all attendees, and in particular to the reviewers (cf. §2.2).
The invitation should include:

- within the email text (i.e. not only in attached files) the exact start and end time of the meeting, as well as the exact place (detailed address);
- travel and location information: access maps, distance and transportation time from / to the airport / train station, etc.;
- suggested hotels, e.g. if a block-booking has been made / planned, if a discount price is available, and more generally support for where to book a hotel room.

At the same time, the PL should upload on the webpage (under Tab "Documents", section "Calendar documents"), all relevant documents related to the invitation like route/access maps.

The PL should also start to update on the webpage the online attendees list, which is pre-formatted with the names of the reviewers, mentor and project coordinator. All the review attendees should be registered on that list, if necessary by requesting specific people to create an account on the ITEA Community website. This procedure is requested to as a measure to guarantee confidentiality.

4.3. Submission of deliverables: two weeks before

Two weeks before each review, the PL should send a second email to the confirmed reviewers, including:

- a draft agenda for the review meeting (start and end time should not change from the original invitation) and, if necessary, an update on the location details (e.g. meeting room – the address should not change from the original invitation);
- notification that all relevant documents and deliverables are available for download on the ITEA Community webpage (these documents should be uploaded[28] to the website before sending this email, at least in pdf version[29]); it includes public documents as well as consortium-confidential ones;
- the clear identification of which deliverables are public SotA documents; if there is no public SotA document, then it should be clearly stated; the SotA documents already available but whose confidentiality status has changed from private to public since the previous review should also be notified here.

The PL will have to email the assigned programme coordinator a justification for the delay of each deliverable which should be available on the webpage two weeks before the review, and which actually is not.

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[28] NB: uploading deliverables should be done at WP level (i.e. in the "Work packages" tab of the project page on the Community website), not at agenda item level.

[29] Ideally in both pdf and docx formats.

Providing the deliverables in time is essential to avoid any misjudgement by the reviewers due to lack of information.

Reviewers will analyse the deliverables during these two weeks, and during the week following the review. If a public SotA document is considered as significantly valuable for the ITEA Living Roadmap, an official notification will be provided after the review.

It is also requested to have updated (whenever needed) all online data from the respective partners' pages, on the Community website, two weeks before the review, in particular:

- the business prospects, to be updated within the "market access" field;
- the Exploitation Related Achievements (ERAs) (NB: if your project has been relying on the Dissemination & Exploitation Overview (DEO) Excel file, then it is okay to update this file instead of filling in online ERAs; in this case, please upload the final update of the DEO as review document on the review agenda page of the ITEA Community website).

Check the PPR template and guidelines for further details.

Simultaneously, the ITEA Office should have received the requested signed DND from the external expert, allowing him to access the deliverables. The project mentor may check with the ITEA Office for confirmation.

Uploaded documents have clear confidentiality rules:

- documents uploaded as public documents can be accessed through the ITEA website by a large audience;
- documents uploaded as confidential can only be accessed by project partners, reviewers of the project and ITEA Office members: the confidentiality is thus guaranteed as other members of the ITEA community won't be able to see these documents;
- documents specifically attached to a review (calendar item on the ITEA Community website) can only be downloaded by review attendees as defined by the online attendees list, i.e. project partners and reviewers (incl. invited PAs and ITEA Office members).

4.4. Final review only: ERTP, two weeks before

In the specific case of the final review, the Exploitable Results by Third Parties (ERTP) need to be delivered two weeks before the review meeting. Each ERTP table is a data sheet with a concise and to-the-point technical description of a project's output that can be re-used by new projects or third parties, under potential conditions (to be detailed). The ERTP will be publicly available on e.g. the ITEA website. At the review preceding the final review the consortium will get the action point to deliver the ERTP two weeks before the final review. The template and instructions will be issued by the ITEA Office just after this review.

4.5. Draft presentations and online data: one week before

One week before the review a final email should be sent by the project coordinator to the confirmed reviewers to provide:

- if necessary, an updated agenda (start and end time should not change);

- the link(s) to download the draft presentation(s) from the ITEA Community webpage[30]; each presentation should be close to its final state, but enhancements can naturally be added, often as a result of feedback from the rehearsal meeting.

Providing the presentations in time is essential to avoid any misjudgement by the reviewers due to lack of information.

This last email can be used to ask the expected attendees to confirm attendance by clicking on the appropriate symbol in the "Presence" column of the "Attendees" tab of the review page (i.e. review calendar item).

4.6. Final checklist: two days before

A final checklist should be considered two days before each review to:

- check the attendees list is up-to-date on the review webpage; if required, ask partners to register to the ITEA Community website;
- ensure attendees confirm their presence on the website;
- update the slides available on the review webpage as well as make sure that when the meeting starts, the online version fits exactly with the presented one; it is essential that reviewers can download the presentations two days[31] before the review, in case the Wi-Fi connection is unavailable or fails before or during the review meeting itself; in any case, the presented slides should be made available as downloads before the review starts;
- prepare a USB key for attending reviewers, which contains the latest versions of both the deliverables and the presentations; it might be of great help where an internet connection is not available (or if it is down); however, the PL should take into account that most reviewers may not have the right to plug a USB key in their laptops, which explains why a Wi-Fi connection is preferred, and why it is required to provide access to a sufficiently finalised version of the slides before the meeting date. Do not provide the review slides in printed version to the reviewers: it only generates costs and a lot of paper with confidential information to be destroyed, and most reviewers significantly prefer relying on digital versions.

The PL can and should use the Community website to share documents, like deliverables and presentations, among reviewers and project partners, as all meeting attendees (even those who are not present) have access to the meeting binder.

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[30] The presentation(s), in pptx or pdf formats, should first be uploaded as meeting binder.

[31] The two-day deadline is linked to the review pairing: a reviewer may have two reviews in a row, on consecutive days, without any internet connection since he/she has left his/her office (cf. also restrictions on USB keys).