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# General Assembly Meeting

WORK PACKAGE 2

Strengthening the In-kind Contribution coordination

Carlo J. Bocchetta



BrightnESS is funded by the European Union's Horizon 2020 research and innovation programme under grant agreement No. 676548  
2nd General Assembly Meeting – Work Package 2 – C.J.Bocchetta, ESS, Lund, 5th Sept 2017

## Overview of WP2

**Strengthening the coordination of In-kind Contributions** - Maximise the possibility for ESS and In-Kind partner organisations to deliver value during the Construction Phase through ‘In-Kind Contributions’ (IKC) according to the **ESS IKC Process** and to minimise and mitigate the risks associated with those contributions.

Partners: STFC (UK), TUD (NL), INFN & Elettra (IT), BNC Wigner (HU), ESS-Bilbao (ES), CEA (FR), FZJ (DE), ESS.

**4.247 M€, 345 Person-Months (minimum)**



## Overview of WP2 – Four Tasks

**WP2.1** Preparation of project implementation and training of resources needed  
(ESS, CEA, FZJ, INFN, ESSB, STFC, BNC Wigner)

**WP2.2** Development and implementation of an In-kind information system for the coordination of IKC activities  
(Elettra, ESS)

**WP2.3** Development of an IKC 'Best Practice' system and standards (WEB) and organisation of collaboration meetings  
(Elettra, ESS)

**WP2.4** Creation of an IKC network of Regional Hubs  
(ESS, STFC, TUD, FZJ, ESSB, INFN, CEA, BNC Wigner)



## Overview of WP2 - Deliverables

	Deliverable	Month	Status
D2.1	Risk assessment and mitigation plan	M3	Accepted
D2.2	Launch of IKC Best practice online platform	M6	Accepted
D2.3	Deployment of Management Information System	M12	Accepted
D2.4	1st Annual IKC Progress Assessment	<del>M13</del> M18	Accepted
D2.5	2nd Annual IKC Progress Assessment	<del>M24</del> M29	In Progress
D2.6	Revision of IKC Best practice online platform	M30	To do
D2.7	IKC Work Package Assignment Plan	M36	To do

**In RED new dates from amendment**



# Overview of WP2 – Milestones

	Milestone	Month	Means of Verification	Status
MS1	Establishment of Regional Hubs	4	Staff in place	Done
MS2	Definition of workflows	6	Management Chart	Done
MS3	1st Organisation of annual IKC conferences	<del>18</del>	Agenda and minutes of IKC conferences	Done
MS4	2nd Organisation of annual IKC conferences	<del>18</del> 29	Agenda and minutes of IKC conferences	Done
MS5	3rd Organisation of annual IKC conferences	<del>30</del> 36	Agenda and minutes of IKC conferences	In progress

**In RED new dates from amendment**

Allows the possibility of an additional workshop to further support partners in the installation phase.

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# Task WP2.1



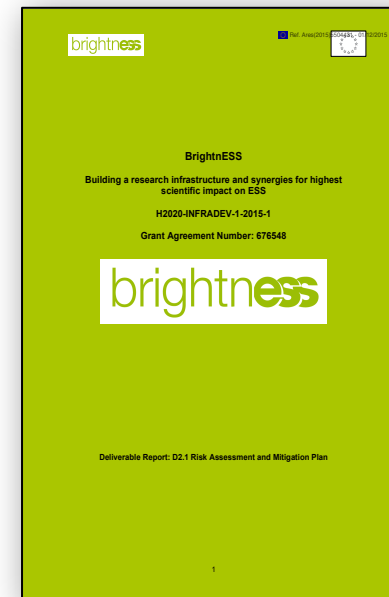
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## WP2.1 - Preparation of project implementation and training of resources

Assessment of ESS project management software to analyse IKC's (contracted, planned and potential), Implementation, Participation and **ESS & partner risk analysis**.

**Deliverable 2.1 (26 page Report) accepted by EC.**

**Risk mitigation activities form the basis of work for Regional Hub Field Coordinators (WP2.4).**

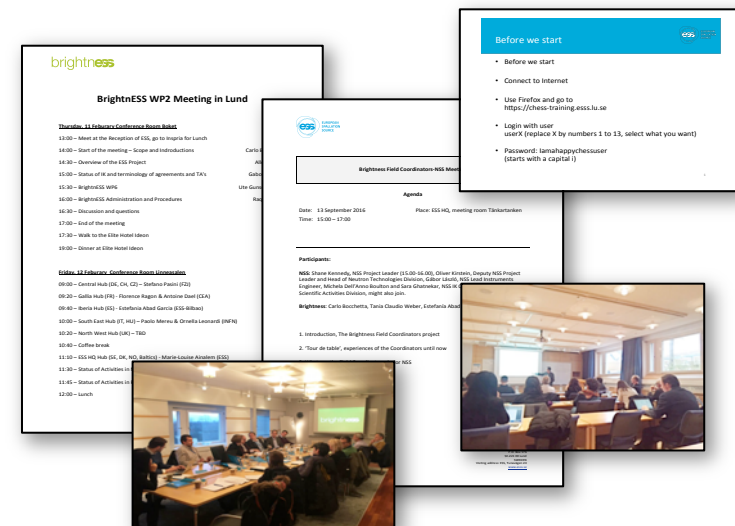


# Highlights WP2.1 - Preparation of project implementation and training of resources

To **strengthen the IKC management of BrightnESS** and in doing so of ESS, regional hubs will be established in the ESS Partner Countries (see WP 2.4). Qualified **Field Coordinators (FC)** will be identified and trained to support this task.

Training of staff to understand the ESS, the related political environment, the involvement of the home institute in ESS and familiarization with other related clusters

- FC's Identified in all Hubs (WP2.4)
- Training sessions held





# Highlights WP2.1 - Preparation of project implementation and training of resources

## Training & Management events for 2016-2017 Field Coordinators

- Support for NSS - 13/Sept/2016 (Lund).
- Preparing for IK installations - 18/Jan/2017 (Catania).
- Training in Quality for IKC (Norms, Procedures & Processes) – 7-8/Mar/2017 (Lund).
- General Management of WP2 – 2/Jun/2017 (Didcot).



Start	End	Duration	Speaker	Topic	Notes
9:00	9:20	0:20	Carlo	Scope of Meeting and General Status of WP2	
9:20	9:40	0:20	Roy	Overview of BrightNESS Status and Expectations	
9:40	10:00	0:20	Roberto	XRMA Status	(video conference)
10:00	10:25	0:25	Philippa	North West Hub - UK Status	
10:25	10:45	0:20		Coffee Break	
10:45	11:00	0:15	Toon	North West Hub - Netherlands Status	
11:00	11:25	0:25	Paolo	South East Hub - Italy Status	
11:25	11:50	0:25	Daniel	South East Hub - Hungary Status	
11:50	12:05	0:15	Milos	Nordic Hub Status	(video conference)
12:05	13:05	1:00		Lunch	
13:05	14:05	1:00		ISIS Visit	
14:05	14:30	0:25	Fiamma	Iberia Hub Status	
14:30	14:55	0:25	Florence	Gallia Hub Status	
14:55	15:20	0:25	Tania	Central Hub Status	
15:20	15:40	0:20		Coffee Break	
15:40	16:00	0:20	Gareth	ESS IK Status	
16:00	16:30	0:30	All	General Discussion & Conclusions	
16:30				End of Meeting	

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# Task WP2.2

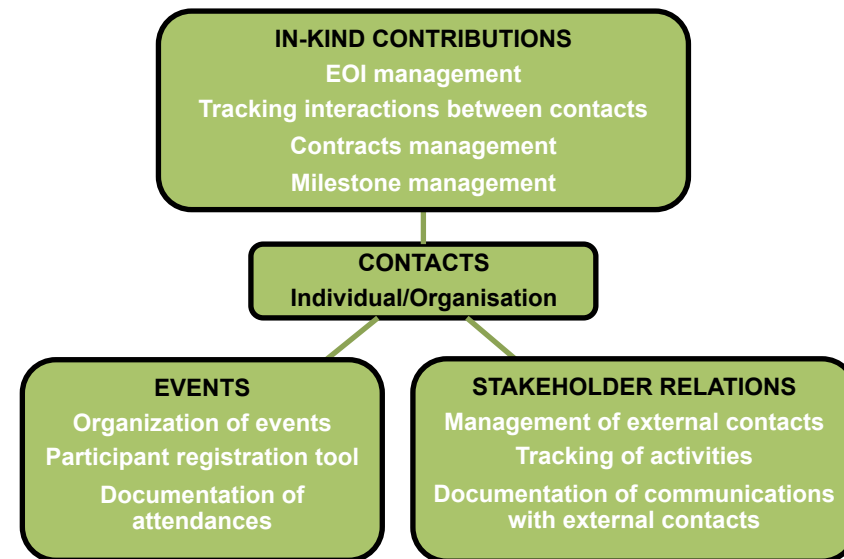


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## WP2.2 - Development and implementation of an In-kind information system – XRM+

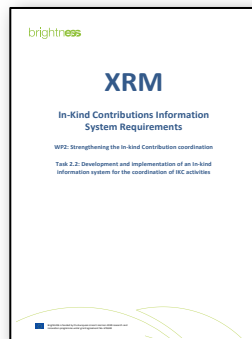
Establish a centralized platform that will provide support to the In-kind Management Coordination Office, management, and governance of the ESS Project. Provide an active database to establish matching the WBS in P6 and Work Package realization with IKC Partners.

1. Activity reporting
2. Project management status reports
3. Documentary evidence for quality assurance and control
4. Process tracking
5. Relations management



## WP2.2 - Development and implementation of an In-kind information system – XRM+

- ESS & Elettra formulated code specification in March 2016



The **staged** writing of the code was assigned to Elettra (approved by EC officer – 25/Jul/2016) with deliverable end Aug 2016 & two updates. This permitted an effective & user friendly development of the database.

- **D2.3 – Accepted (44 page report):** Describes the system which **includes the core and most important functionalities** and is the official deliverable D2.3 in the grant agreement. Includes the design of the core database and the implementation of the general structure (users, contacts, institutes, in-kind contributions, etc.) **on top of which all other components will be added.**



- **Update 1 (28/2/2017):** Improvements and a Dash Board and an on-line reporting system. **Transfer the XRM+ code to ESS servers.**
- **Update 2 (31/8/2017):** Improvements and integration with external tools CiviCRM and Primavera P6.
- **Review (31/8/2018):** Improvements and forms for integration with external tools: Indico and CHESS with the storage of acceptance reports.

## WP2.2 - Development and implementation of an In-kind information system – XRM+

**Status August 2017** – The program is being tested by Field Coordinators and IK interface people at the ESS.

- **Update 1 (28/2/2017): Improvements and a Dash Board and an on-line reporting system:** The reporting function has expanded significantly compared to what was initially planned, including Council approval reports, Country Sheet Reports, Call Off reports and all the other reports listed in the requirements.  
**Modification to Update 1: XRM+ code will continue to be on Elettra servers until end Jan 2018 following discussions at ESS with IT to enhance its development and debugging. Allows time for adjustments on server at ESS.**
- **Update 2 (31/8/2017): Improvements and integration with external tools CiviCRM and Primavera P6:** Integration of CiviCRM is close to completion. Integration to P6 has been put on hold pending a review of functionality.



## WP2.2 - Development and implementation of an In-kind information system – XRM+

Milos shows live example of XRM+ use

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# Task WP2.3



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## WP2.3 - Development of IKC 'Best Practice' system and organisation of collaboration meetings

**Maximize the common knowledge of how to best execute IKC activities** among all actors in the ESS Project. **Establish standard approaches to implementation of technical scope** through systematic 'Best Practice' workshops and a shared information platform aimed at continuous improvement.

Knowledge will be exchanged and shared across an open communication platform (WEB based). Consisting of:

1. ESS Project and IKC related documents that are relatively static
2. News on the status of the project and IKC and
3. Forums for sharing questions and answers based on common internet-style forums focused on specific ESS IKC issues.
4. Documents from the Best Practice workshops.



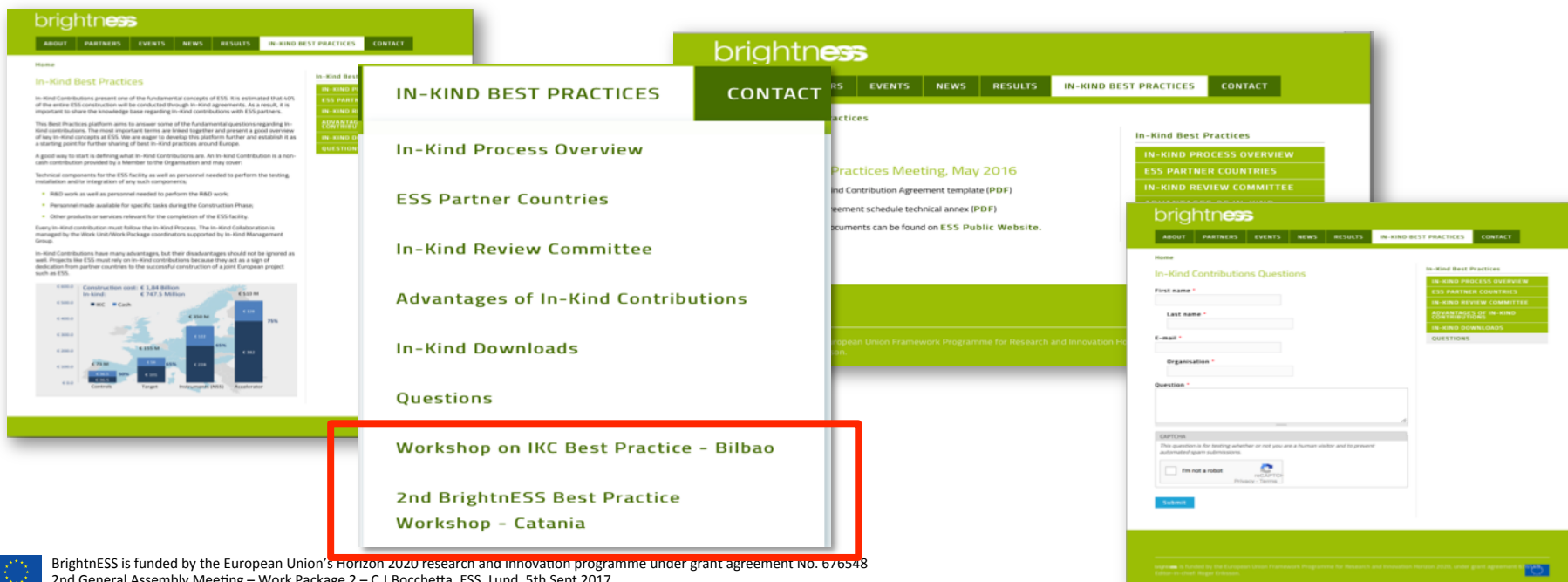
Interface done on the BrightnESS WEB page & described in deliverable D2.2 (accepted)





# WP2.3 - Development of IKC 'Best Practice' system and organisation of collaboration meetings

WEB Page: <https://brightness.esss.se/in-kind-best-practices/in-kind-process-overview>



The collage displays several screenshots of the 'In-Kind Best Practices' website. The top navigation bar includes links for ABOUT, PARTNERS, EVENTS, NEWS, RESULTS, IN-KIND BEST PRACTICES, and CONTACT. The main content area features a list of links: IN-KIND BEST PRACTICES, CONTACT, IN-KIND PROCESS OVERVIEW, ESS PARTNER COUNTRIES, IN-KIND REVIEW COMMITTEE, Advantages of In-Kind Contributions, In-Kind Downloads, and Questions. A red box highlights two specific workshop events: 'Workshop on IKC Best Practice - Bilbao' and '2nd BrightnESS Best Practice Workshop - Catania'. A sidebar on the right contains a 'In-Kind Contributions Questions' form with fields for first name, last name, email, and organization, along with a 'Submit' button. A bar chart at the bottom left shows construction costs in billions of Euros, comparing 'In-kind' contributions to 'Cash' contributions across different categories.

# Highlights WP2.3 - Development of IKC 'Best Practice' system and organisation of collaboration meetings

The Best Practice workshops are organised by ESS in collaboration with the technical groups at the ESS and with input from the Field Coordinators (Partners).

Elettra provides support personnel and financial support for all speakers and chairpersons. Elettra covers the costs of travel, accomodation, venue and catering.

Host ESS partners provided local support.

Two events have been organised:



**Engineering aspects of large-scale In-Kind projects**  
ESS-Bilbao, Bilbao, Spain



**Installation aspects of large-scale In-Kind projects**  
INFN-LNS, Catania, Italy

## Highlights WP2.3 - Development of IKC 'Best Practice' system and organisation of collaboration meetings

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Host ESS partners provided local support.

Two events have been organised:

### Speakers and participants from:

- **CERN, ITER, European-XFEL, MAX IV Laboratory, SwissFEL, J-Parc, SNS, FAIR, SKA Organisation, Cherenkov Telescope Array Observatory**
- **ESS Partners**
- **ESS**



## Highlights WP2.3 - Development of IKC 'Best Practice' system and organisation of collaboration meetings

1<sup>st</sup> BrightnESS Best Practice workshop was held on 14-15 November 2016 in Bilbao, Spain. 80+ attendees. Organised and supported by ESS-Bilbao, Elettra & ESS.

**“Engineering aspects of large-scale In-Kind projects”**

**Four Sessions (22 speakers):**

- **Plenary**
- **Standardization**
- **Integration**
- **Project Information Management**

**ESS-Bilbao provided local support and laboratory visits. Presentations are public on the BrightnESS web page.**

<https://brightness.esss.se/in-kind-best-practices/workshop-ikc-best-practice-bilbao>

**The workshop was dedicated to the engineering requirements and constraints of in-kind contributions (IKC) to large-scale research infrastructure projects, such as the ESS.**

**Experience was shared from other large-scale projects, from partners and the ESS itself and proposed improvements to the engineering practices when working on IKC.**

Projects based on IKC have unique aspects associated with the management and sharing of project information, the adoption of standards and the consequent approaches to interfaces and integration. Partner contributions are often the result of work from national teams that have long standing knowledge of specialized design, manufacturing and operation. Partners have their own extensive expertise with in-house engineering protocols and standards which may differ from other collaborating partners and the host project. Whenever protocols, conventions and engineering practices differ between partners, the project and/or the contribution may have integration overheads that will impact both schedule and costs.



## Highlights WP2.3 - Development of IKC 'Best Practice' system and organisation of collaboration meetings

2<sup>nd</sup> BrightnESS Best Practice workshop was held on 13-14 June 2017 in Catania, Italy. 100+ attendees. Organized and supported by INFN-LNS, Elettra & ESS.

### “Installation aspects of large-scale In-Kind projects”

Four Sessions (22+ speakers):

- Plenary
- Design, Integration & preparation for installation
- Installation
- Systems Commissioning

INFN-LNS provided local support and laboratory visits.

Presentations are public on the BrightnESS web page.

<https://brightness.esss.se/in-kind-best-practices/2nd-best-practice-workshop-catania>

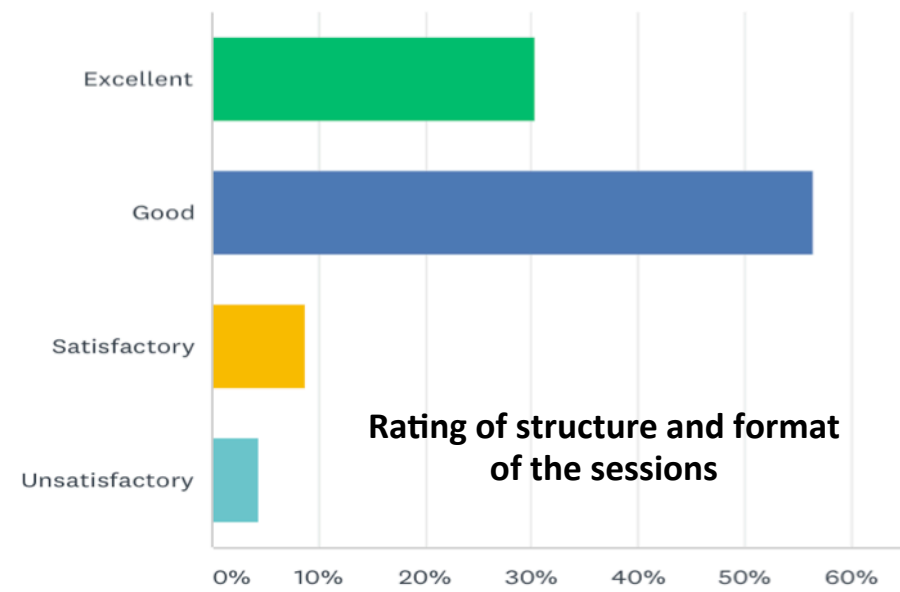
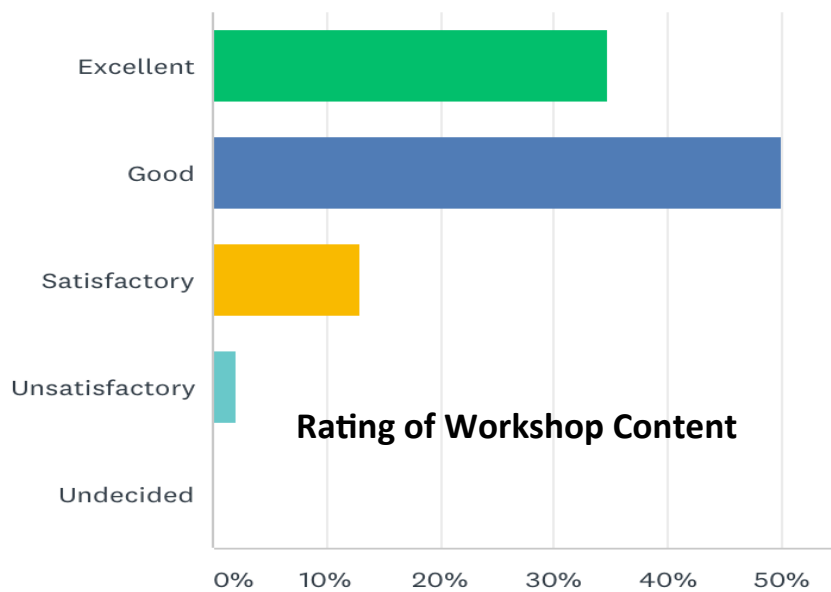
The workshop was dedicated to the processes, requirements and preparation for the installation of in-kind contributions (IKC) to large-scale research infrastructure projects with focus on the European Spallation Source ERIC (ESS).

The plenary session reviewed international projects and their experience with preparation, installation and system commissioning. The talks highlighted best practices adopted and provide a forum for recommendations.

The **Design, Integration and Preparation** session focussed on safety and Swedish regulations, survey and alignment, logistics and storage, cable coordination and preparations for installation, including document and procedures, planning and sequences. The session on **Installation** covered its organisation and the required services, the coordination and planning of In-Kind contributions including concurrent activities with the installation of conventional facility and cryogenic plants and ESS partner considerations for an In-Kind installation. **Systems Commissioning** covered ESS commissioning strategies, the switch on and system commissioning of the controls systems, initial beam commissioning and asset and maintenance management.



## Highlights WP2.3 – Catania Survey (47% of attendees)



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# Task WP2.4



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## WP2.4 - Creation of an IKC network of Regional Hubs

**The regional hubs are established and have Field Coordinators that:**

- Assist the timely and qualitative delivery of IKC in their region.
- Are involved and support all three phases of the IKC process.
- Have regular meetings between the ESS HQ and other Regional Hubs.
- Participate in the organization and facilitation of Task 2.3 (best practice workshops)

Task 2.4 is directly linked to global ESS Project milestones and key performance indicators.

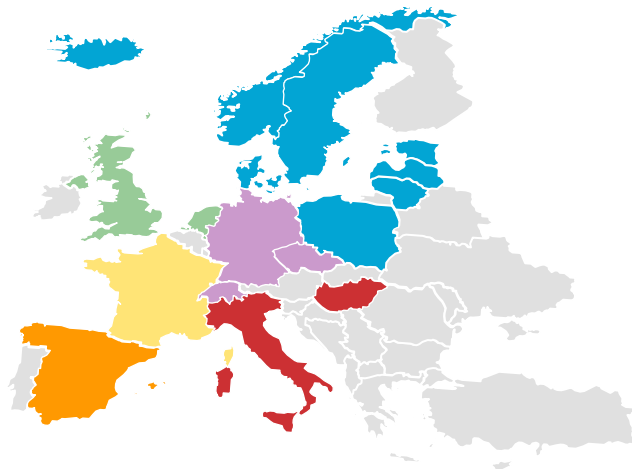
- **Field Coordinators are additional resources for the IK processes.**
- **Will enhance the communication channels.**
- **Assist in addressing risks and risk mitigation of IK processes.**
- **Strengthen interfaces, reinforce quality, standards and best practices by facilitating the flow of critical information between partners.**





## WP2.4 - Creation of an IKC network of Regional Hubs

Up to 26 people active for WP2.4 – with six leaders.



WP2 Regional Hubs

Regional Hub	Owner	Field Coordinator	Countries
North-West	STFC TU Delft	Louise Dixon, Deena Fernandes, Justin Greenhalgh, <b>Philippa Kingston</b> , John Webber for the UK <b>Toon Verhoeven</b> for the NL	UK NL
Central	FZJ	Stefano Pasini, <b>Tania Claudio Weber</b>	DE, CZ, CH
Iberia	ESS Bilbao	Estefania Abad Garcia, <b>Fiamma Garcia-Toriello</b>	ES
Gallia	CEA	Antoine Dael, <b>Florence Ragon</b> ,	FR
South-East	INFN BNC Wigner	Santo Gammino, Ornella Leonardi <b>Paolo Mereu</b> , Andrea Miraglia for IT <b>Dániel Csanády</b> for HU	IT HU
Nordic-Baltic	ESS	Marie-Louise Ainalem, Gareth Aspinall, Jazmin Barreto Hamneby, Carlo J. Bocchetta, <b>Miloš Davidović</b> , Michela Dell'Anno Boulton (NSS), Wojtek Fabianowski (ICS), Peo Gustavsson (ACC), Jazmin Barreto Hamneby,	DK, SE, NO, IS, LT, LV, EE, PL

*Field Coordinator Leaders in bold*

## **For reference from Grant Proposal: The first and foremost responsibility IKC Field Coordinators is coordination between ESS and its respective Partners.**

- Support ESS in identification and evaluation of potential IKC Partners in Partner Countries.
- Assist in evaluating Partners based on technical merits and capabilities.
- Facilitate timely and qualitative achievement of IKC Agreements.
- Will act as representatives of ESS at the Partner institutes and organizations, providing support and service in key components of In-kind collaboration.
- Monitor and maintain technical progress relative to schedule on IKCs during the periods of peak project activity.
- ESS IKC Coordinators will maintain daily communication with In-kind Partners.
- They must establish knowledge of In-kind processes and procedures, ESS and Partner needs, local industrial and institutional capacities.
- Will report their activities in centrally, and maintain a strong connection with the Work Package Leaders coordinators.
- Harmonise efforts with national ILOs, help to bridge the gap between industry and institutes, and multiple IKC Partners.
- Will be the first line quality control agents.
- Must identify potential problems and opportunities and be empowered to act to avoid or resolve issues (or communicate issues to both ESS and partners and recommend actions where possible).
- Will observe and facilitate establishment of quality criteria, acceptance, transfer and transportation of In-kind component between IKC Partners and ultimately to the ESS site in Lund.
- IKC Field Coordinators will be expected to spend a majority of their time on the road, constantly interacting with potential and current partners.



**For reference from Grant Proposal:** The first and foremost responsibility IKC Field Coordinators is coordination between ESS and its respective Partners.

- Support ESS in identifying potential partners.
- Assist in evaluating potential partners.
- Facilitate timely and effective communication between partners.
- Will act as representative of ESS to potential partners.
- Monitor and maintain the list of potential partners.
- ESS IKC Coordinators will be responsible for the following tasks:
  - They must establish a list of potential partners.
  - Will report their activities to the ESS site in Lund.
  - Harmonise efforts with other coordinators.
  - Will be the first line of communication between ESS and potential partners.
  - Must identify potential partners and recommend them to the ESS site in Lund.
  - Will observe and facilitate establishment of quality criteria, acceptance, transfer and transportation of in-kind components between IKC Partners and ultimately to the ESS site in Lund.
- IKC Field Coordinators will be expected to spend a majority of their time on the road, constantly interacting with potential and current partners.

**Field Coordinators have a generous and broad list of tasks and activities.**

## Highlights WP2.4 – Field Coordinator Activities

### At the ESS

- Be knowledgeable of the IK processes, ESS master plan, standards, quality control, systems engineering management plans, logistics and related documents, be up to date with ESS IK "cost-book" work-packages both "still to be assigned" and "assigned".
- Actions that requires training and follow-ups at the ESS.

### Share lessons learnt

Bi-Weekly Meetings,  
Visits,  
Calls, Training events,  
Workshops

### At the Hubs

- Track/Assist partner activities.
- Track/Assist activities shared between different partners - both within the regional hub and between regional hub partners.
- Report to ESS & Partner Leaders issues that arise or risks in program execution.
- Where possible propose solutions.



## Highlights WP2.4 – Field Coordinator Activities

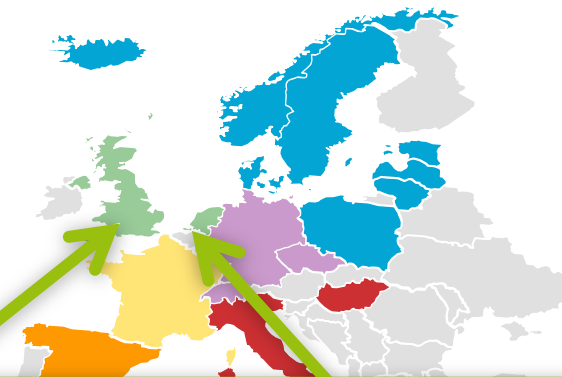
**The heterogeneous nature of Hub IK status has led to a diversity of actions by the Field Coordinators.**

**e.g. country membership, national law and regulations and level of maturity of the work for the ESS In-Kind contributions.**

**Hub Field Coordinators act within the mandate of WP2 as appropriate for the level of maturity of the IK activities.**

**These actions are in line with the objectives and goals of Work Package 2, as exemplified in Deliverable D2.4.**

## Highlights WP2.4 – North West Hub



### UK

- Attended WP2 training events and Best Practice Workshops and disseminated to UK IK Project Managers.
- Monitoring and keeping up to date with progress on UK IK contributions and from these monitoring activities identify potential problems/opportunities that need field coordinator assistance or communication to ESS/UK Board to mitigate the risk.
- Understanding ESS IK processes and assisting IKC project managers navigate these
- Facilitating work to get IKA and TAs to point of agreement with ESS.
- Establishing and running Project Office (specific STFC role in grant agreement)
  - The Project Office is now established and fully staffed.
  - Functions as the coordination point for all the UKs IK contributions to ESS
  - Provides advice and support to PMs (STFC procurement, financial processes and PM best practice along with ESS processes and information.
  - Coordinates the IKC updates to the UK-ESS Board allowing the Board to better understand and therefore deal with the risks to the UK's contributions to ESS.
- Developed a dashboard to help communicate progress, issues and risks to the UK-ESS Board
- Introduced a UK-ESS Risk Management Plan and updated risk register.
- Put in place a change management plan that aligns with the ESS change control procedure.
- Contributed to risk mitigation by communicating identified risks and issues at the appropriate level.
- Facilitated progress on: STFC agreements required with IK partners University of Huddersfield & UKAEA, VAT (using exemption certificates), IKA – progress made though still not resolved.

### NL

All major activities are related to trying to have the Netherlands becoming a solid founding member of ESS.

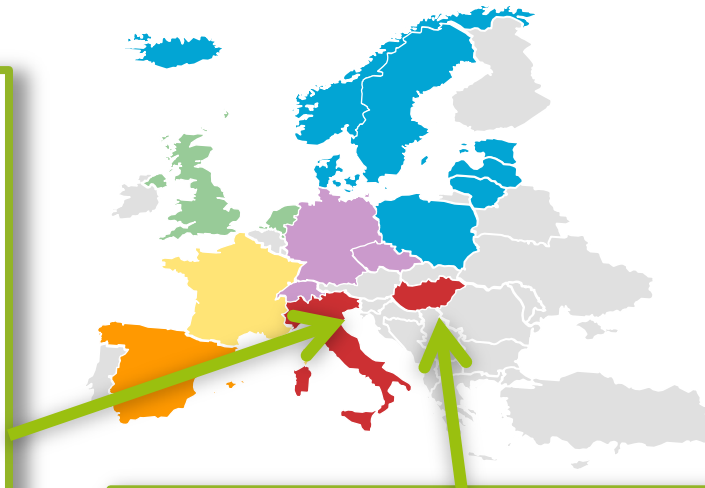
- Attending WP2 Training Events and Best Practice Workshops.
- Assisting the Netherlands to become a member of the ESS through attendance and presentations to meetings (Dutch ILO, Dutch ministries, Business forums, International EU conferences).
- The major step in the funding process was the detailed roadmap application that was send in on June 1, 2017.
- The Dutch scientists are ready to participate.
- The Dutch industry is ready to work on the packages available at the moment of becoming an ESS member
- Supporting Swedish and Dutch Science Council visits.
- Assisting ESS delegations.



## Highlights WP2.4 – South East Hub

### IT

Creation of intra-partner network devoted to IKC management (INFN groups, Elettra, CNR).  
 Regular meetings with HU partners and the creation of a Field Coordinator for Hungary.  
 Dissemination of best practices, harmonisation of tenders, QA/QC, documentation.  
 Mitigate risks through the creation and monitoring of Industrial Partner Network (surveys, network of able industries,..)  
 Distribution of information (i.e., characterisation of technical industrial expertise) to increase available participants in calls for tender.  
 QA during manufacturing, periodic visits to companies, scheduled meetings, handling of non-conformities.  
 Monitoring and checking progress wrt ESS schedule, supporting compilation of monthly reports.  
 Check and share information for interfaces and installations.  
 Creation of a Database for Orders & Supplies and document management.  
 Meetings with other Hub partners and EU laboratories (i.e., DESY, GSI)  
 Participating in WP2 meetings and training events.  
 Organisation of Catania Workshop



### HU

The South-East hub has evolved with a Field Coordinator (Dániel Csanády) for Hungary in addition to that of Italy (Paolo Mereu).  
 Disseminating information and minimising risks to HU partners.  
 Participating in training events at ESS and workshops.  
 Participating in Hub meetings (IT & HU)  
 Tracking activities at Hub partners.

## Highlights WP2.4 – Gallia Hub

Attend training at ESS and sharing information in its home institutes e.g. Quality (Mar. 2017) and accompanied by L. Napoly (Quality Engineer at CEA/Irfu).

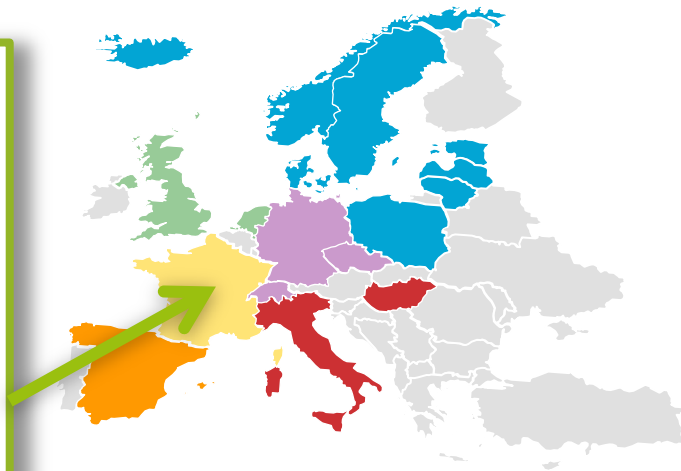
Regular contact with all the stakeholders:

- CEA/Irfu: Monthly ESS-Irfu Meeting & Weekly Meeting on Cryomodule Assembly
- CNRS/IPNO: Regular Meetings on Industrial Progress (e.g. Meeting with Sébastien Bousson on the 20/03/2017)
- CEA-CNRS/LLB: Regular interactions with LLB scientists (e.g. Meeting on the 06/06/2017 with Christiane Alba-Simionesco & LLB scientists for an update on the French contribution to ESS Instruments)
- The Gallia Hub has also regular contacts with the French representatives in ESS governing bodies (council, AFC, Collaboration Board,...).

Promoted Best Practice workshops in the hub, selecting speakers and participants  
Collaborating with the national ILO and communicating (processes, schedules) with industry on IKC from France, assisting with meetings.

Assisting partners on VAT issues and certificates.

Improving awareness of information sources to French partners (i.e., CHES at ESS).



WP2 Regional Hubs

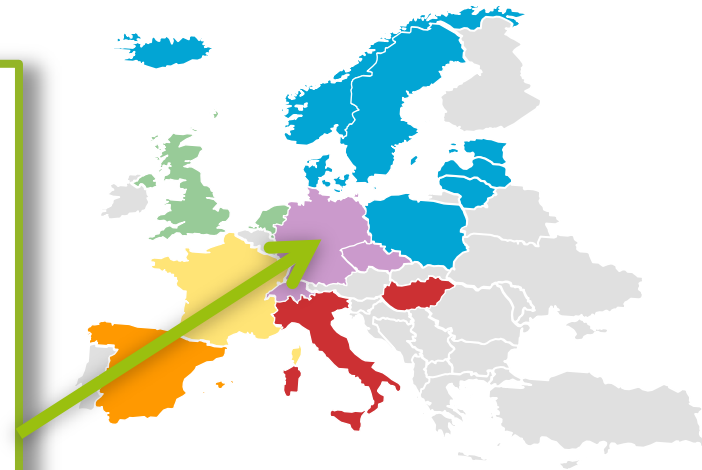




## Highlights WP2.4 – Central Hub

Established processes to facilitate the management of documentation (technical annexes, contribution agreements, collaboration agreements, etc) using Jira.  
 Worked on several solutions around the delay of financing due to VAT issues between the member country and ESS.  
 Introduced a financial controlling plan for risk mitigation on internal overspending with any ESS related work.  
 Started work on the quality management plan and assigned a quality manager to the ESS project.  
 Worked in close contact with ESS and partners to establish priorities and project integration. Contributed to risk mitigation by communicating identified risks and issues at the appropriate level and bringing together the right people to resolve or identify solutions.  
 Constantly visited in-kind partners in DE, CZ, CH and FR to discuss urgent issues related to technical annexes, early procurement and contributions agreements

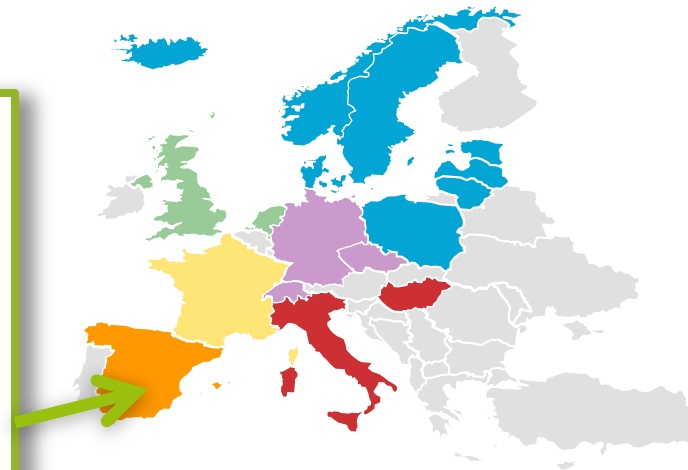
Organised German Contributions workshop (10/11/16, DE), Shielding Meeting (03-05/05/17, DE), visit to FZJ by DMSc (19/02/17, DE).  
 Meeting with LLB (22/06/17) enhancing consortium instruments.  
 Connection to other H2020 projects (SoNDe 02/06/17)  
 Visits to IK partners and suppliers sharing lessons learnt.  
 Attendance to Best Practice workshops (13-15/11/16 ES, 13-14/06/17 IT), Trianing Events (13-16/02/17 SE), General Meeting (02/06/17, UK).



WP2 Regional Hubs

## Highlights WP2.4 – Iberia Hub

- Supporting work to get TA and IKC ready to sign with ESS
- Supervision and monitoring IK work
  - Milestones tracking (progress, achievements, delays, action points)
  - Regular meetings with WP leaders
  - Monitoring of WP planning and monthly report
- Supporting work in Call for Tenders preparation and procurements tracking
- Understanding ESS IK processes and assisting WP leaders follow them
- Risks Management of the WPs
- Coordination with ESS and other partners – biweekly videoconferences- to share information
- Supporting works and coordination with ESS in Logistics
- Coordination with ESS Installation Managers to plan future installation works
- Understanding QA/QC ESS requirements and supporting Quality Control work for Spanish IK contribution
- Coordination with WP6 outreach and dissemination
- Coordination with Spanish ILO
- Follow up Technical Board and Collaboration Board meetings for Accelerator, Target and Instruments

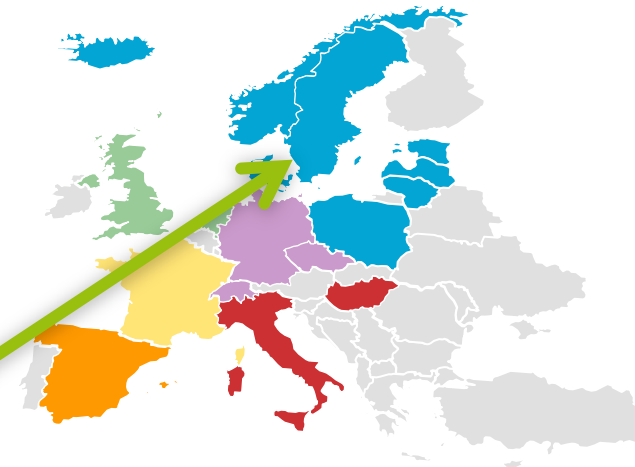


WP2 Regional Hubs



## Highlights WP2.4 – Nordic-Baltic Hub

- Attended Quality Training at ESS March 6<sup>th</sup>-7<sup>th</sup> 2017. Strengthened emphasis on future communication between Quality Group at ESS and Field Coordinators.
- Extensive effort put into conceptualizing, managing, and deploying the XRM+ platform to different level internal and external stakeholders. Weekly meetings with partners from Elettra ensure continued development. With support from other Lund based BrightnESS personnel, contacts database has been implemented as an additional feature of the software.
- Monitoring In-Kind contributions between Nordic partner countries and ESS. Mitigating current and potential risks.
- Strong emphasis on collaboration with internal ESS stakeholders vis-à-vis the VAT issues surfacing for some of ESS Nordic Partners.
- Identifying gaps in dedicated In-Kind Value with the partners. Assessing future opportunities for collaboration with ESS sub-projects.
- Establishing and maintaining a relationship with key stakeholders in all Nordic Partner Institutes. Liaising between internal ESS staff and partners.
- Supporting the Call-Off procedure (particular to Norway); facilitating administrative requirements for payments to be made – strong cooperation with ICS and Accelerator Sub-Projects.



WP2 Regional Hubs



# Results

- **All Major objectives attained in this second year.**
- **WP2 Continues to provides additional resources to both ESS and partners for many IK actions.**
- **IK Information System is streamlining data and keeping ESS participants up to date on actions, provides support for partner-partner interactions. Broader use of the program is envisaged following beta-testing by FC's and selected ESS support personnel.**
- **The IK Best Practice Workshops are leading to shared knowledge and recommendations on the extremely important areas of engineering, testing, component assembly and installation.**
- **Field Coordinators track activities highlighting risks and provide support to a wide range of topics. They strengthen inter-regional partner communication which mitigates risks and open new opportunities for IK work and support. A network of skilled multi-tasking people has been established that extends international cooperation and will catalyse new opportunities.**



## Issues resolved

- **Strengthened inter-regional interactions in the south-east hub. Meetings held between SE hub members and amendment made allowing Hungary to have an FC and activities in WP2.**
- **All hubs fully staffed and working. ESS interface personnel (Accelerator, NSS and ICS) operational.**
- **Strengthened WP2 awareness in Estonia and Norway.**

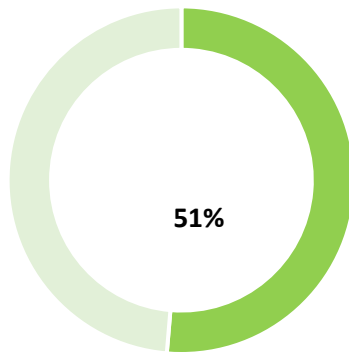
## Issues to resolved

- **Strengthen interaction with partners in Poland. Initial contact has been made with Nuclear Physics Institute in Krakow (Dec-2016). Follow-up meetings in Sept/Oct Krakow, Wroclaw, Warsaw.**



# WP2 Expenditure months 1-22 (as % of 36 months)

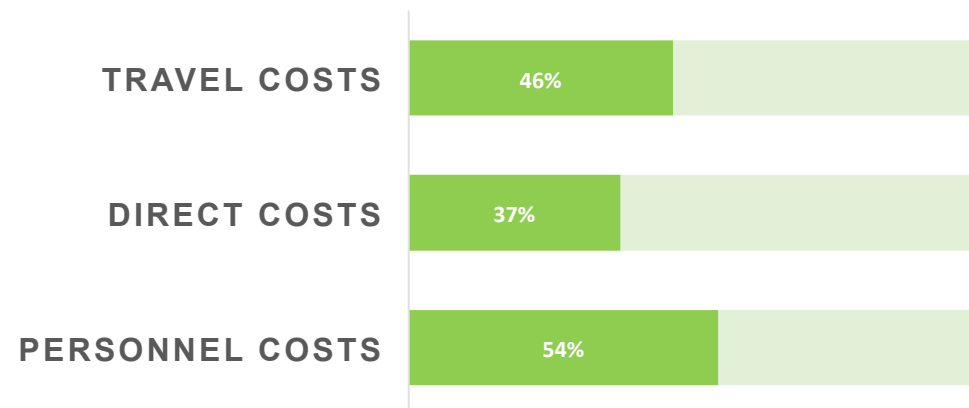
## Overall expenditure



> 50%

**Forecast for linear spending ~61%**

## Expenditure per cost categories



## Next steps

- **WP2.1:** Focus of training and transfer of information for IK Component installation. Review current and forecasted risks for IKC at partners and interact with ESS and hubs to assist in mitigation. Update FC's on ESS developments for installation processes: personnel, Swedish protocols, logistics, health and safety, etc..
- **WP2.2:** Extend use of XRM+ to partners and additional ESS personnel. Continue development and debugging. Review incorporation of P6 data. Transfer code to ESS servers by Feb 2018 and cover support and transfer costs at ESS
- **WP2.3:** Follow up with conclusions of Catania workshop and survey and update WEB page. Initiate 3<sup>rd</sup> Workshop organisation. Examine possibility of an additional topical workshop at ESS for specific aspects of facility installation of IK components and services.
- **WP2.4:** Continue the strengthening of FC activities and their network. Enhance focus at partner laboratories on preparations for installations and processes, continue work on QC, deliveries and tests at partners, etc... Continue to strengthen relations between partner institutes within a hub with focused meetings and actions.



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