

MAKSWELL H2020 Project
Kick-off meeting
Rome, 9 January 2018
Istat, Aula Magna, Via Cesare Balbo 14

**MAKSWELL - MAKing Sustainable development and WELL-being
frameworks work for policy**

WP7 management - coordination of the consortium

Maria Grazia Calza – Istat
Project Manager

MAKSWELL is based on

- Grant Agreement (GA) n. 770643

The Agreement is composed of:

Terms and Conditions

Annex 1 Description of the action

Annex 2 Estimated budget for the action

2a Additional information on the estimated budget

Annex 3 Accession Forms

Annex 4 Model for the financial statements

Annex 5 Model for the certificate on the financial statements (CFS)

Annex 6 Model for the certificate on the methodology)

- Consortium Agreement (CA) – October 2017

MAKSWELL main facts

Coordination and Support action

Funded by: European Commission, DIRECTORATE-GENERAL RESEARCH & INNOVATION (call H2020-SC6-CO-CREATION-2017)

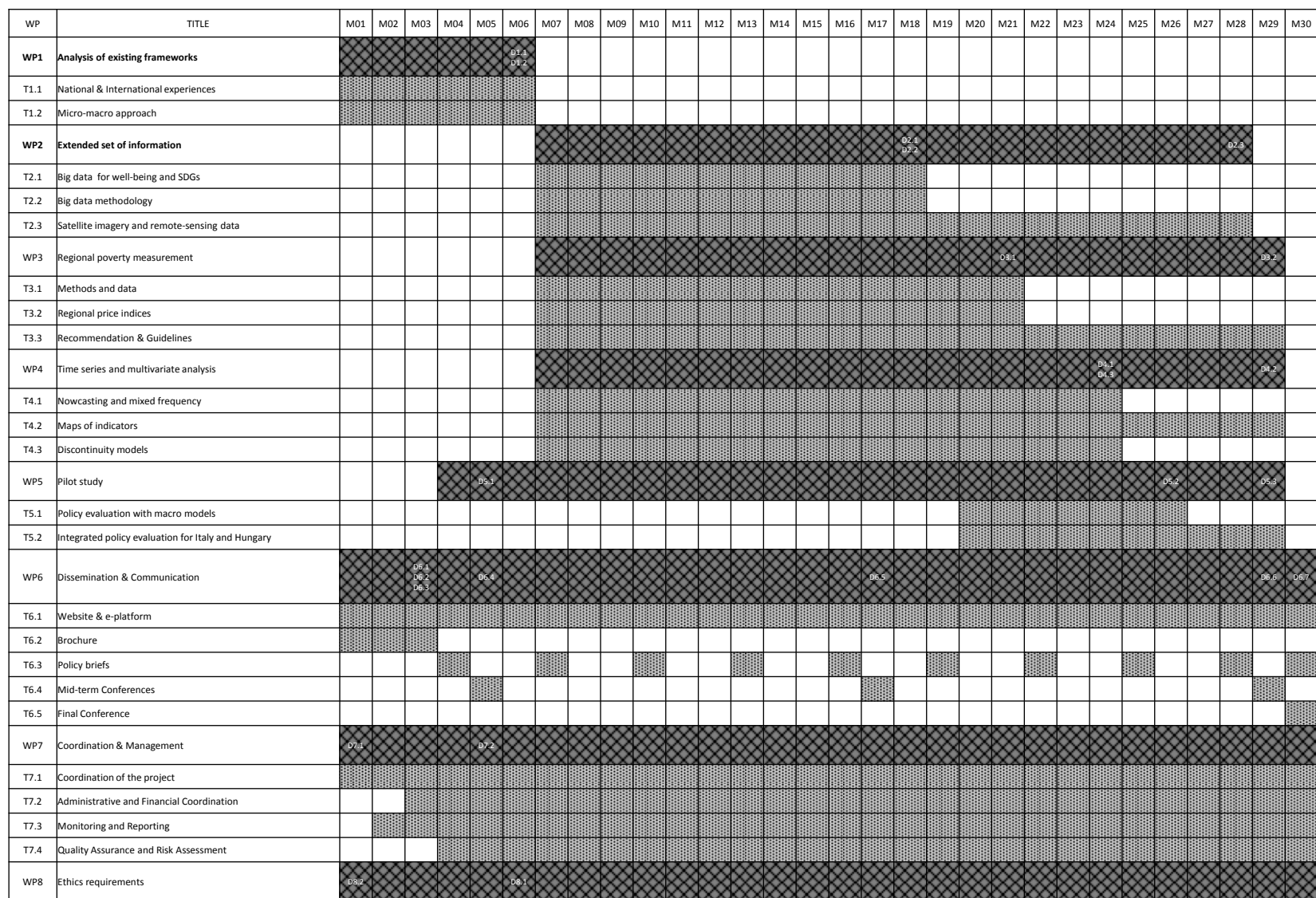
EU Financial Contribution: EUR 934,296.88

Duration: 30 months, 1 November 2017 – 30 April 2020

Expected outputs:

- **24 Deliverables**
- **16 milestones**
- **Review event to be organised on the on-going work on WP2, 3 and 4**
- **2 Periodic Reports at the end of the following periods:**
 - 1st period (M1-M18) 1 November 2017 - 30 April 2019**
 - 2nd period (M19-M30) 1 May 2019 - 30 April 2020**
- **one Final Report**

Gantt Chart



Expected outputs: deliverables

24 Deliverables - as foreseen in Annex 1 (Description of the action)

- 14 deliverables in the first reporting period (M1-M18, 1 November 2017 - 30 April 2019)
 - 10 deliverables in the second reporting period (M19-M30, 1 May 2019 - 30 April 2020)
- all deliverables must be submitted according to the timetable specified in the DoA
- the partner in charge of the deliverable will circulate a draft among the partners in order to define a final version in accordance with the consortium
- the coordinator will define a template for the final version that will be made available to the partners
- as to deliverables which are events/activities the partner in charge has to write a brief report on the event/activity (following a specific template that will be provided)
- the final version of the deliverable will be submitted electronically by the coordinator to the EC via the Participant Portal

Deliverables due in the first reporting period

Deliverable	Deliverable name	Work package number	Short name of lead participant	Delivery date	
D7.1	Kick off meeting	WP7	ISTAT	M01	Nov. 2017
D8.2	Ethics	WP8	ISTAT	M01	Nov. 2017
D6.1	Report on website and e-platform development	WP6	MIPA	M03	Jan. 2018
D6.2	Report on the brochure development	WP6	MIPA	M03	Jan. 2018
D6.3	Report on policy briefs development	WP6	MIPA	M03	Jan. 2018
D6.4.1	Mid-term workshop 1	WP6	MIPA	M5	March 2018
D5.1	Reflection paper	WP5	ISTAT	M5	March 2018
D1.1	Report on international and national experiences and main insight for policy use of wellbeing and sustainability framework.	WP1	ISTAT	M06	April 2018
D1.2	Definition of the existing database on Beyond GDP initiatives within official statistics.	WP1	ISTAT	M06	April 2018
D7.2	Data Management Plan	WP7	ISTAT	M06	April 2018
D8.1	Ethics	WP8	ISTAT	M06	April 2018
D6.4.2	Mid-term workshop 2	WP6	MIPA	M17	March 2019
D2.1	Report on aspects of existing database and traditional and non-traditional data sources and collection of good practices and recommendation	WP2	CBS	M18	April 2019
D2.2	Report on methodological aspects for using big data	WP2	CBS	M18	April 2019

Deliverables due in the second reporting period

Deliverable	Deliverable name	Work package number	Short name of lead participant	Delivery date	
D3.1	Report on methods and data base for regional income and household expenditures	WP3	TRIER	M21	July 2019
D4.1	Report on nowcasting and mixed frequency model for the integrated analysis of well-being and SDGs	WP4	SOTON	M24	Oct. 2019
D4.3	Report on alternative estimators of discontinuity	WP4	SOTON	M24	Oct. 2019
D5.2	Technical report on a macro evaluation of well-being using a macroeconometric model	WP5	ISTAT	M26	Dic. 2019
D2.3	Report on identification of future research needs in terms of statistical methodologies and new data	WP2	CBS	M28	Feb 2020
D3.2	Guidelines for best practices implementation for transferring methodology	WP3	TRIER	M29	March 2020
D4.2	Report on multivariate analysis on MIP and well-being and SDGs indicators	WP4	SOTON	M29	March 2020
D5.3	Report on results of Pilot study	WP5	ISTAT	M29	March 2020
D6.4.3	Mid-term workshop 3	WP6	MIPA	M29	March 2020
D6.5	Final conference	WP6	MIPA	M30	April 2020

Milestones

Number		Title	Lead Beneficiary	Due Date (in months)	Description	Work Package No.
M1	✓	Mid-term workshop 1	Consorzio MIPA	5	Mid-term workshop 1	6
M2	✓	Reflection paper	ISTAT	5	Early reflection paper to define future pathways with respect of FP9. The paper, involving all participants, will come as the outcome of the mid-term workshop 1	5
M3	✓	Report on international and national experiences and main insight for policy use of wellbeing and sustainability framework	ISTAT	6	Report on international and national experiences and main insight for policy use of wellbeing and sustainability framework	1
M4	✓	Mid-term workshop 2	Consorzio MIPA	17	Mid-term workshop 2	6
M5	✓	Report on aspects of existing database and traditional and non-traditional data sources and collection of good practices and recommendation	CBS	18	Report on aspects of existing database and traditional and non-traditional data sources and collection of good practices and recommendation	2
M6	✓	Report on methodological aspects for using big data	CBS	18	Report on methodological aspects for using big data	2
M7	✓	Report on methods and data base for regional income and household expenditures	UT	21	Report on methods and data base for regional income and household expenditures	3
M8	✓	Report on nowcasting and mixed frequency model for the integrated analysis of well-being and SDGs	SOUTHAMPTON	24	Report on nowcasting and mixed frequency model for the integrated analysis of well-being and SDGs	4
M9	✓	Report on alternative estimators of discontinuity	SOUTHAMPTON	24	Report on alternative estimators of discontinuity	4
M10	✓	Technical report on a macro evaluation of well-being using a macroeconomic model	ISTAT	26	Technical report on a macro evaluation of well-being using a macroeconomic model	5
M11	✓	Report on identification of future research needs in terms of statistical methodologies and new data	CBS	28	Report on identification of future research needs in terms of statistical methodologies and new data	2
M12	✓	Guidelines for best practices implementation for transferring methodology	UT	29	Guidelines for best practices implementation for transferring methodology	3
M13	✓	Report on multivariate analysis on MIP and well-being and SDGs indicators	SOUTHAMPTON	29	Report on multivariate analysis on MIP and well-being and SDGs indicators	4
M14	✓	Report on the results of pilot study	ISTAT	29	Report on the results of pilot study	5
M15	✓	Mid-term workshop 3	Consorzio MIPA	29	Mid-term workshop 3	6
M16	✓	Final Conference	Consorzio MIPA	30	Final Conference	6

Requests by the Project Officer during the negotiation phase

- As a requirement of the ethics summary report the European Commission asked to include a new work package on ethics in order to clarify the type of data that will be used in the project.
- Since the first draft of FP9 will be prepared before summer 2018 , it was requested to produce within this date a reflection paper to give recommendations for stakeholders and future pathways with respect of FP9. To this effect it was agreed that the reflection paper could be the outcome of the first workshop of MAKSWELL at month 5 (March 2018) that will involve European and international statisticians
- Request for a review reporting/event in November 2018 on Makswell on-going work in WP2, 3 and 4. It will be a project review by outside experts with the aim to give an extra professional view and to support the work.

Project management structure

The scientific and technical coordination of the project will be managed by ISTAT.

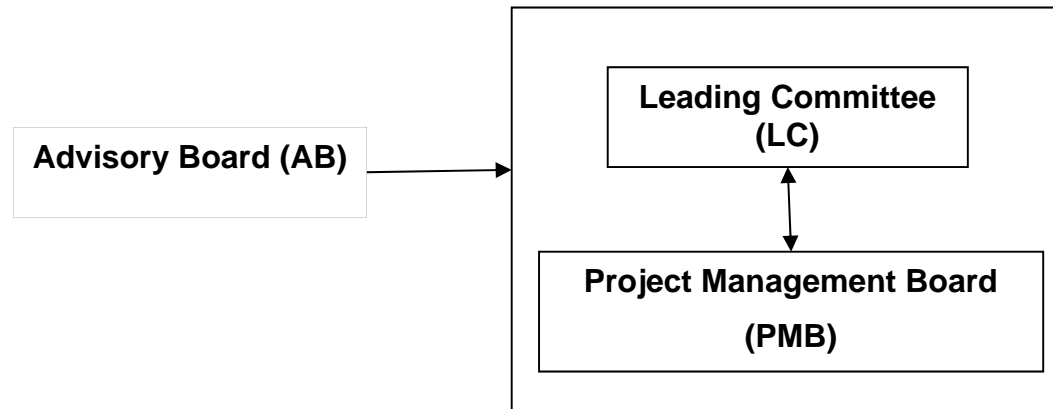
In particular, the Coordinator shall be responsible for:

- the management of the Project
- monitoring compliance by the Parties with their obligations
- collecting, reviewing to verify consistency and submitting reports, other deliverables (including financial statements and related certifications) and specific requested documents to the Funding Authority
- transmitting documents and information connected with the Project to any other Parties concerned
- administering the financial contribution of the Funding Authority and fulfilling the financial tasks
- providing, upon request, the Parties with official copies or originals of documents that are in the sole possession of the Coordinator when such copies or originals are necessary for the Parties to present claims.

Istat is responsible for the preparation and submission to the EC of the Periodic Project reports and the Final Report.

Istat will chair the envisaged governance boards and coordinate the Advisory Board.

Project management structure



- The **Advisory Board (AB)** is a counselling body providing advice and guidance for the development of the project to ensure high quality and excellence
- The **Project Management Board (PMB)**, chaired by the project coordinator, is formed by all partners. It's responsible for the scientific and technical coordination of the project. It represents also the general assembly of the project which takes decisions on administrative and financial matters which transcend the individual work packages and partners. It takes decisions on the opportunity of amending the work plan.
- The **Leading Committee (LC)**, acting more operationally, is chaired by the scientific coordinator, and it is formed by WPs leaders. It is intended to ensure and facilitate the dialogue within each work package and among work packages. Each WP will be led by a **WP leader** identified among the partners involved in the WP activities. The WP leaders will report to the LC and to the PMB, on the progress and on-going activities of the WP.

Advisory Board

The **Advisory Board (AB)** is the body in charge of providing strategic advice to the management of the Project, which will benefit from the high level expertise and knowledge of the members. The AB will have an agile composition ensuring flexibility, high level expertise at international level on different aspects dealing with the activities foreseen for the project and coverage of specific component (Producers, Academia, IT/Big Data, Media).

The AB will be composed by 4 members of high level following four component and representing:

- Producers
- Academia
- IT/Big Data
- Media (Journalist)

The AB will be chaired by Marina Gandolfo, Head International Affairs Division of Istat

The Advisory Board:

- have physical meeting at least once per year and possibly videoconference on specific matters raised by the coordinator in agreement with all the partners
- is committed in the events planned within the project and members will contribute with their high level expertise also supporting the dissemination of the events

Advisory board members

- **Francesca Perucci**, Chief of the Statistical Service branch of the UN Statistical Division.
- **Michel Dumontier**, Distinguished University Professor in the field of data science at Maastricht University.
- **Milena Gabanelli**, Italian journalist very famous for being the author and anchorwoman in the independent investigative journalism Television program Report, which regularly exposes the misuse of public funds and political and corporate corruption.
- The member from the Academia is going to be appointed

Distribution of Financial Contribution

The financial contribution of the Funding Authority to the Project shall be distributed by the Coordinator according to:

- the Consortium Plan agreed budget
- the approval of reports by the Funding Authority

A Party shall be funded only for its tasks carried out in accordance with the Consortium Plan.

The following payments will be made to the coordinator:

- one pre-financing payment
- one interim payments (The Commission will pay to the coordinator the amount due as interim payment within 90 days from receiving the periodic report)
- one payment of the balance

The total amount of pre-financing and interim payments must not exceed 90% of the maximum grant amount.

The payment of the balance reimburses the remaining part of the eligible costs incurred by the beneficiaries for the implementation of the action.

Pre-financing

	Direct Cost: Personnel	Direct Cost: Other	Indirect Costs	Total Costs/ Maximum EU Contribution (GA Art. 5.1)	Pre-financing: 80% EU contribution (GA Art. 21.2)	Guarantee Fund: 5% EU contribution (GA Art. 21.2)	1st Payment: Pre-financing
1. ISTAT	139,750	20861.50	40,152.88	200,764.38	160,611.50	10,038.22	150,573.28
2. UT	93,900	13985	26,971.25	134,856.25	107,885.00	6,742.81	101,142.19
3. UNIFI	81,200	12080	23,320.00	116,600.00	93,280.00	5,830.00	87,450.00
4. SOUTHAMPTON	85,500	12725	24,556.25	122,781.25	98,225.00	6,139.06	92,085.94
5. CBS	98,400	14660	28,265.00	141,325.00	113,060.00	7,066.25	105,993.75
6. DESTATIS	60,000	8900	17,225.00	86,125.00	68,900.00	4,306.25	64,593.75
7. HCISO	30,240	4436	8,669.00	43,345.00	34,676.00	2,167.25	32,508.75
8. Consorzio MIPA	39,900	30900	17,700.00	88,500.00	70,800.00	4,425.00	66,375.00
Total	628,890	118,547.50	186,859.38	934,296.88	747,437.50	46,714.84	700,722.66

An amount of EUR 46,714.84 (forty six thousand seven hundred and fourteen EURO and eighty four eurocents), corresponding to 5% of the maximum grant amount is retained by the Commission from the pre-financing payment and transferred into the 'Guarantee Fund'.

Data Management Plan (DMP)

Data Management Plan (DMP)

The DMP will be set up by means of gathering and rearrangement of the technical outputs produced by partners. The DMP will include information on:

- the handling of research data during and after the end of the project
- what data will be collected, processed and/or generated
- which methodology and standards will be applied
- whether data will be shared/made open access and
- how data will be curated and preserved (including after the end of the project).

Participants: ISTAT/ MIPA

ISTAT Coordination Team
rd-projects@istat.it

Maria Grazia Calza

Francesca D'Ambrogio

Tamara Zangla

Filippo Lioy

Andrea Paparelli



Thank you for your attention