

Innovation Action



**CBDC powered Smart PerFORrmanCe contracTs for Efficiency, Sustainable,
Inclusive, Energy use**

D1.1 Quality, Risk and Innovation Handbook

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Abbreviations

DoW	Description of Work
EU	European Union
EC	European Commission
GA	Grant Agreement
ESIE	Efficient, Sustainable and Inclusive Energy
SSH	Social Sciences and Humanities
CBDC	Central Bank Digital Currency
HW, H/W	Hardware
IDEB	Innovation, Dissemination & Exploitation Board
IPR	Intellectual Property Rights
KPI	Key Performance Indicator
PC	Project Coordinator
PEB	Project Executive Board
PMI	Project Management Institute
PI	Principal Investigator
PGA	Project General Assembly
QAS	Quality Assurance Supervisor
QMP	Quality Management Plan
SW, S/W	Software
TL	Task Leader
WP	Work Package
WPL	Work Package Leader

Executive Summary

This document describes the quality management procedures that apply to FORTESIE design, implementation and pilot stages. The close following of, and coherence to the Quality Management Plan is a joint responsibility of all project partners until the complete discharge of all obligations under the EC Grant Contract in order to ensure the quality of all project deliverables and the following of the coordination guidelines among partners during the project's tasks execution. The plan presented hereafter, consists of planned and systematic processes and steps to determine and ensure achievement of the FORTESIE quality objectives. Moreover, it is going to be used to monitor the corrective actions employed to verify that agreed procedures are in place and are being adequately implemented. To this end, this document identifies a list of Key Performance Indicators (KPIs) that will be used and continuously updated throughout the life of FORTESIE in order to monitor the progress and also the quality of the work performed in the various executed tasks.

1 Introduction

The overall vision of FORTESIE is to design, demonstrate, validate and replicate innovative renovation packages in the building industry with Smart Performance-Based guarantees and financing, aiming at Efficient, Sustainable and Inclusive Energy (ESIE) use to accelerate the Renovation Wave in Europe. The renovation packages will combine state-of-the-art construction materials and technologies components (prefabricated facades, BIPV, heat pumps, etc.), innovative digital technologies for measurement and verification, and attractive financing (e.g. contractual frameworks for smart performance guarantees, financing mechanisms, engagement techniques, green-euros, etc.), to raise the overall EPC value proposition. The renovation packages will be tailored to specific target groups needs and optimised to improve the ESIE performance considering energy, CO₂ and comfort. Each package will be demonstrated and validated in real life use cases and customised for replication in all other partner countries for immediate market take-up.

Methodologies from Social Sciences and Humanities (SSH) will be adopted for:

- a. the creation of collaborative business models that boost the Renovation Wave by considering all stakeholders' value and revenue streams,
- b. novel incentivisation and behavioural change models that aim to stimulate long term engagement with focused interactions to adopt green behaviour
- c. the incorporation of a digital currency, green-euro, (€G) for financing, rewarding and creating an inclusive / collective narrative in the fight against climate change
- d. the collection of feedback for recommendations to policy and business stakeholders,
- e. Mapping and understanding the complex interplay between the different stakeholders to deliver an engagement strategy across the value chain.

These demonstrations will potentially constitute the green-euro as a retail Central Bank Digital Currency (CBDC), hence revolutionising the financing of renovation approaches. An online marketplace, will be offering first level advice, directing consumers through the value chain of stakeholders and facilitating access to these “packaged” renovation services.

1.1 Purpose of this Document

The Quality, Risk and Innovation handbook documents the necessary information required to effectively manage project quality from project planning to delivery. It defines a project's quality policies, procedures, criteria for and areas of application, and roles, responsibilities and authorities.

The purpose of this document is to provide the description of the quality procedures that will be applied along the project implementation stages. The Quality Management Plan is the joint responsibility of all project partners until the complete discharge of all obligations under the EC grant.

The Quality, Risk and Innovation Handbook ensures the quality of all project deliverables and the proper coordination among partners during the tasks' execution. In more detail, the Quality Management Plan objectives are:

- To ensure smooth project progress
- To develop documentation of the project progress in line with quality metrics, ethical and technical standards
- To detect early deviations from the project plan
- To initiate remedial action (if necessary) as soon as possible

The practices defined in this Quality, Risk and Innovation handbook will ensure that quality is built within the project's working processes. Therefore, the Quality, Risk and Innovation handbook consists of planned and systematic activities to determine and ensure that the quality objectives of FORTESIE are met.

The project management will serve as the point of contact for the project coordinator and all FORTESIE partners on all FORTESIE quality matters.

The Quality Management tasks are divided into phase-specific and non-phase specific tasks. Phase specific tasks are related to the life cycle phase of the project while non-phase-specific tasks will remain the same throughout the project regardless of the specific phase (e.g. deliverable handling).

Non-Phase-Specific Tasks:

- Project Decision Structure
- Submission of Deliverables
- Project Monitoring
- Corrective Actions
- Software and Hardware life-cycle
- Contracts
- Internal Communication

The FORTESIE project will administer a non-conformance and corrective action program that will verify early detection and correction of deviations from the project plan. Non-conformance will be documented and corrective actions applied. The Quality, Risk and Innovation Handbook will monitor the corrective actions employed to verify that agreed procedures are in place and are being adequately implemented.

1.2 References and applicable documents

1.2.1 Reference documents

The documents, to which the present Quality, Risk and Innovation handbook is referring, are:

- a. Project Management Institute (PMI) – <https://www.pmi.org/>

1.2.2 Applicable documents

The documents, which are applied in the present Quality, Risk and Innovation handbook, are:

- a. Grant Agreement, number: 101080029 — FORTESIE — HORIZON-CL5-2021-D4-02
- b. Consortium Agreement: approved by partners on 30 August 2022

1.2.3 Structure of the Document

The structure of this document is as follows:

- Section 2 presents the management structure of the FORTESIE project together with the project bodies, the main roles and the responsible persons. The Quality Management Plan will be based on this structure.

-
- Section 3 describes the FORTESIE quality management activities that will ensure the proper implementation of the project plan.
 - Section 4 presents the quality reviewing activities that have been designed for the quality assurance of the project deliverables and of documents published by members of the FORTESIE consortium.
 - Section 5 describes the configuration management activities that will take place within the FORTESIE project for every product/ deliverable.
 - Section 6 presents in detail the Quality Attributes and the Key Performance Indicators that are set for the FORTESIE project in order to assess the quality of the project results.

2 Project Organisation, Roles and Responsibilities

General Project Management in FORTESIE is based on and characterized by major principles:

- **Principle of an integrated project structure:** Create an integrated project structure that incorporates technical, scientific and partner coordination as well as issues of commonplace business operation.
- **Principle of binding decision provisions and agreements upon all partners:** Arrange decision-making to take place close to responsible level of execution, elevate if necessary. Provide reliable and trusted agreements to protect intellectual properties of all partners.

Based on these major principles, the project management approach guarantees transparency and commitment to all engaged partners and thus facilitates an unobstructed and successful project evolution. It assures that FORTESIE meets its entire objectives on time, on budget and with the best possible quality results.

2.1 Project Management Structure

The management structure of the FORTESIE project is described as follows, depicted in **Figure 1.**

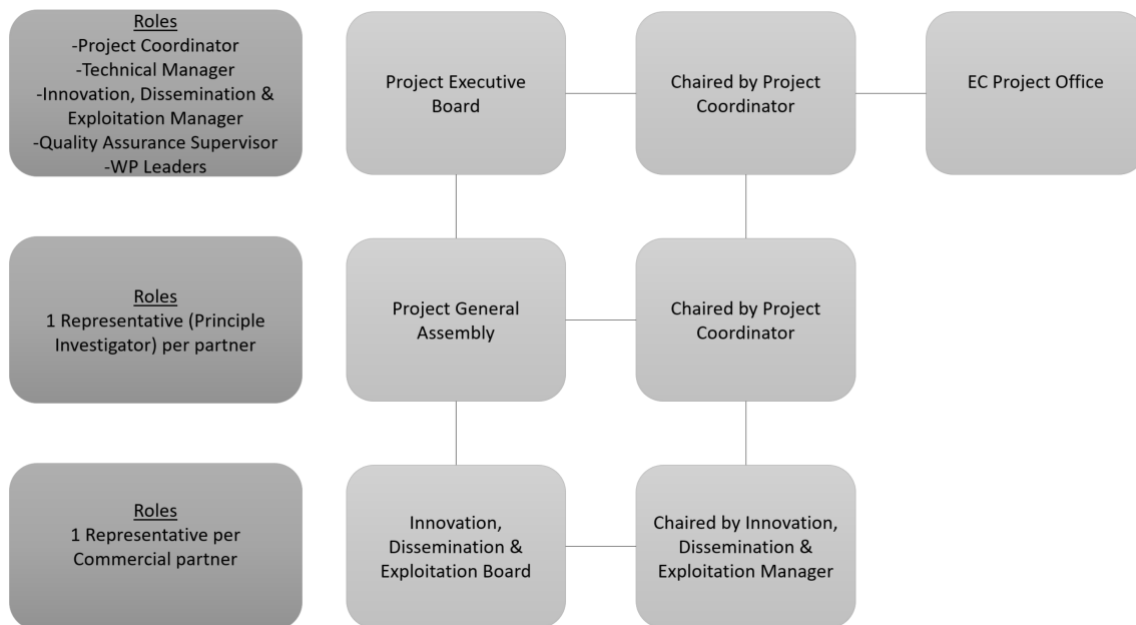


Figure 1 FORTESIE Management Structure

2.1.1 Project Executive Board

The Project Executive Board is the body of the Consortium responsible for the planning, execution and controlling of the project. It encompasses the following activities:

- Administration and scientific coordination activities
- Implementation of all action plans

- Establishing a budget and schedule-controlling system
- Quality assurance
- Handling of Intellectual Property issues
- Development and application of a communication and reporting culture
- Creation of efficient and effective team structures

It consists of the following roles: Project Coordinator, Technical Manager, Innovation, Dissemination & Exploitation Board and Quality Assurance Supervisor. The main activities of each role are listed below:

Project Coordinator (PC) – The PC will act as the primary contact point for the European Commission and responsible for the overall project coordination. This comprises reporting to the Commission on progress, changes in the project consortium or the project work plan as well receipt of feedback on the research results of each work package.

The main management task of the project coordinator is to ensure that the work packages and tasks achieve the expected results and the project makes adequate and timely progress towards achieving its objectives based on these results. For this the coordinator will have to keep in close contact with the work package leaders to ensure that the intended deliverables are produced according to the planned schedule and delivered to the Commission and the project reviewers as required. The coordinator will convene and chair the regular technical meetings of the project General Assembly. The responsibilities of the PC include mediation and dispute resolution in cases of conflict and application of contingency measures in cases of non-performance of a partner, failure to produce the necessary research results, recruiting failure, or resourcing problems.

Finally, the PC will be responsible for ensuring that the consortium agreement including issues of intellectual property rights and any other legal documents are properly prepared and managed.

Technical Manager – This role will ensure that the scientific and technological objectives of the project are met. The Technical Manager will cooperate closely with the Work Package Leaders and support the Project Coordinator in ensuring that the scientific and technology objectives are met timely and with high scientific and technical quality.

Innovation, Dissemination & Exploitation Board (IDEB) – reports to the Coordinator, collaborates with the General Assembly, and deals with all matters relating to dissemination and communication of the FORTESIE results, the management of the knowledge acquired in the course of the project, innovation aspects, and quality of provided services. Furthermore, IDEB tackles all issues targeting a wide exploitation of the project's outcomes identifying business cases and IPR issues. IDEB's members will be primarily selected from the commercial partners; a clear representation of the research partners, being IPR owners, will be pursued as well.

Quality Assurance Supervisor (QAS) – The QAS will cooperate with the PC, with the responsibility to ensure that an effective Quality Plan is developed and to ensure that the quality assurance function is being effectively executed. Each work package Leader will assume the role of Quality Controller and take responsibility within that work package for implementing and executing the quality control procedures defined in the Quality Plan. A number of Quality Assessors will be designated from the staff of the partners of the Consortium, to take responsibility for assessing quality. The Quality Assessors will conduct their reviews on a defined periodic basis, and will report their findings to the PC.

Work Package Leaders (WPL) – WP leaders are requested to report to the Project Coordinator on the technical progress of their own WP, as further explained in section 2.1.4.

Table 1 Project Executive Board

Role	Partner	Name	Contact Details
Project Coordinator	ED	Anastasia Garbi	anastasia.garbi@eurodyn.com +35261134543
Technical Manager	EDGR	Alkiviadis Giannakoulis	alkiviadis.giannakoulis@eurodyn.com +30 21 0809 4500
Innovation, Dissemination & Exploitation Manager	EDGR	Paraskevi Plagaki	paraskevi.plagaki@eurodyn.com +30 21 0809 4500
Quality Assurance Supervisor	EDGR	Kostas Panagopoulos	kostas.panagopoulos@eurodyn.com +30 21 0809 4500
WP1 Leader	ED	Anastasia Garbi	anastasia.garbi@eurodyn.com +35261134543
WP2 Leader	CTIC	Sonia García	sonia.garcia@fundacionctic.org +34 984291212
WP3 Leader	ED	Alkiviadis Giannakoulis	alkiviadis.giannakoulis@eurodyn.com +30 21 0809 4500
WP4 Leader	NTUA	Christos Kontzinos	ckon@epu.ntua.gr +306975464112
WP5 Leader	SIN	Thomas Mikkelsen	thomas.mikkelsen@smartinnovationnorway.com +45 23210119
WP6 Leader	INCL	Christina Sianidou	christina@inclusinn.com +306989003087

The Project Coordinator is the only official channel that interacts with the European Commission, especially with regards to the submission of deliverables, aspects related to third parties and the FORTESIE consortium.

2.1.2 Project General Assembly

The Project General Assembly (PGA) is the major decision-making body of the FORTESIE project. It comprises one principle investigator (PI) from each project partner. The General Assembly will meet each half year. The purpose of the meetings is to discuss in detail the project's progress and to decide on and evaluate FORTESIE general technical directions on a regular basis. For this, the Project General

Assembly will receive reports from each Work Package Leader and each Working Group Leader¹. The Project General Assembly will decide, whether the progress in each Work Package is acceptable, and if necessary, amendments in the work plan, shift resources or initiate contingency actions. The Project General Assembly will further discuss and decide on the project finances, issues of intellectual property rights, and major disputes. In cases, where the Project Coordinator feels the need to discuss urgent matters with the whole General Assembly, apart from the regular meetings (2 times per year), she will convene an additional electronic meeting of the Project General Assembly. Each member of the General Assembly has one vote, which may be made by proxy, if necessary. Preferably, PGA's decisions are taken by consensus. If this turns out not feasible, decisions will be taken by majority vote with the PC retaining the casting vote. The full list of the matters handled by the Project General Assembly and the detailed procedures for decision-making and voting are set out in the Consortium Agreement.

Table 2 Project General Assembly

Role	Name	Contact Details
ED Main Contact	Anastasia Garbi	anastasia.garbi@eurodyn.com +35261134543
EDGR Main Contact	Alkiviadis Giannakoulis	Alkiviadis.giannakoulis@eurodyn.com +30 21 0809 4500
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LEIF Main Contact	Aija Zucika	aija.zucika@lvif.gov.lv +37128307589
COOP Main Contact	Catarina Pereira	cpereira@coopernico.org +351969806229
LUH Main Contact	Ricarda Puschky	ricarda.puschky@iri.uni-hannover.de +(0049) 511-762 14197
CTIC Main Contact	Sonia García	sonia.garcia@fundacionctic.org +34984291212

¹ According to the necessities that will arise during the implementation of the program, some parallel working groups may be necessary to be formed which will be led by a certain "Working Group Leader".

VEO Main Contact	Mercedes Simón	mercedes.simon-caicoya.ext@veolia.com +629168392
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GKW Main Contact	Piotr Chmielewski	projects@gorakalwaria.pl +603807458

2.1.3 Innovation, Dissemination & Exploitation Board

The Innovation, Dissemination & Exploitation Board reports to the Coordinator, collaborates with the General Assembly: its main activities are within the context of WP6 and is responsible to deal with all matters relating to dissemination and communication of the FORTESIE results, safeguard and realise the management and communication of the knowledge acquired in the course of the project in an effective manner, boost innovation potential and assure the quality of provided services. Furthermore, IDEB tackles all issues targeting a wide exploitation of the project's outcomes identifying business cases and IPR issues. IDEB's members will be primarily selected from the commercial partners; a clear representation of the research partners, being IPR owners, will be pursued as well.

Table 3 Innovation, Dissemination & Exploitation Board

Role	Name	Contact Details
Innovation, Dissemination & Exploitation Manager	Paraskevi Plagaki	paraskevi.plagaki@eurodyn.com +30 21 0809 4500
ED Member	Anastasia Garbi	anastasia.garbi@eurodyn.com +322 5418540
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IEECP Member	Vassilis Stavrakas	vasilis@ieecp.org +306979737067
SIN Member	Brita Staal	brita.staal@smartinnovationnorway.com +47 93852352
LEIF Member	Aija Zucika	aija.zucika@lvif.gov.lv +37128307589
COOP Member	Catarina Pereira	cpereira@coopernico.org +351969806229
LUH Member	Ricarda Puschky	ricarda.puschky@iri.uni-hannover.de +(0049) 511-762 14197
CTIC Member	Sonia García	sonia.garcia@fundacionctic.org +34 984291212
VEO Member	Mercedes Simón	mercedes.simon-caicoya.ext@veolia.com +629168392
OKT Member	Gabriel Quentin	g.quentin@oktave.fr +0805383483
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GSIS Member	Konstantinos Zachakis	k.zahakis@gsis.gr +30 2104802545
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MESH Member	Arnis Glaznieks	arnis@mesh.lv +37126517859
DEE Member	Inese Berzina	inese.berzina@em.gov.lv +26355535
GKW Member	Piotr Chmielewski	projects@gorakalwaria.pl +603807458

2.1.4 Work Package Leaders

As outlined in the work plan, for each work package a Work Package Leader has been allocated (Table 4). All WPLs are senior / principal investigators of the project partners. The Work Package Leaders report directly to the Project Coordinator and are responsible for monitoring and reporting on progress within their work package and for the timely and adequate production of the deliverables.

Table 4 Work Package Leaders

Work Package	Name	Partner	Contact Details
WP1 Leader	Anastasia Garbi	ED	anastasia.garbi@eurodyn.com +35261134543
WP2 Leader	Sonia García	CTIC	sonia.garcia@fundacionctic.org +34 984291212
WP3 Leader	Alkiviadis Giannakoulis	EDGR	alkiviadis.giannakoulis@eurodyn.com +30 21 0809 4500
WP4 Leader	Christos Kontzinos	NTUA	ckon@epu.ntua.gr +306975464112
WP5 Leader	Brita Staal	SIN	brita.staal@smartinnovationnorway.com +47 93852352
WP6 Leader	Christina Sianidou	INCL	christina@inclusinn.com +306989003087

2.1.5 Work Package Task Leaders

For each task within a Work Package, a Task Leader (TL) is also allocated. Task Leaders are responsible for the proper execution of work within their Task and also organise meetings of the corresponding task teams, whenever it appears to be necessary to discuss the further progressing of work in the specific Work Package.

2.2 Work Plan / Allocation

The following table (**Table 5**) lists the effort distribution per partner per task for the whole project duration.

Table 5 Work Plan / Allocation Table

WP List - Effort form	ED	EDGR	NTUA	CCO2	IEECP	SIN	LEIF	COOP	LUH	CTIC	VEO	OKT	TGT	INCL	ENE	GAR	14S	GOP	JUST	APES	ECN	CRD	GSIS	EEF	MESH	DEE	GKW	Total		
Tasks	E	PM	PM	PM	PM	PM	PM	PM	PM	PM	PM	PM	PM	PM	PM	PM	PM	PM	PM	PM	PM	PM	PM	PM	PM	PM	PM	PM		
WP1 - Project Management	1	36	19.0	18.0	7.0	1.0	1.0	1.0	11.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	78.0		
T1.1 Project Management	1	36	12	5	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	42.0		
T1.2 Technical and Scientific coordination	1	36	2	10	3																							15.0		
T1.3 Quality Assurance	1	36	4	2																								6.0		
T1.4 Ethical, Privacy and Legal Issues	1	36		1																								11.0		
T1.5 Data management	1	36	1		3																							4.0		
WP2 - Design of Combined Service Packages	1	25	7.0	7.0	12.0	9.0	5.0	5.0	3.0	3.0	2.0	18.0	2.0	3.0	3.0	0.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	119.0	
T2.1 Analysis of end user requirements and Definition of Services	1	6	1	1	1	1	4	1	1	1		6	1	1	1		1	1	1	1	1	1	1	1	1	1	1	1	33.0	
T2.2 Value-added Services design and Specifications based on SSH-approach (co-creation)	3	25	2	2	9		1	4	1	1		1	1	1	1		1	1	1	1	1	1	1	1	1	1	1	1	37.0	
T2.3 Reference architecture tailored to renovation technologies for increased performance	6	25	2	4	2	2				1	9																		20.0	
T2.4 Novel market structures and business models for renovation services	1	25	2			6			1	1	1	2			1	1	1	1	1	1	1	1	1	1	1	1	1	1	28.0	
WP3 - Components Development and Integration	5	29	13.0	24.0	17.0	22.0	6.0	3.0	0.0	6.0	1.0	30.0	8.0	0.0	14.0	0.0	0.0	10.0	0.0	1.0	9.0	0.0	0.0	14.0	2.0	0.0	9.0	0.0	189.0	
T3.1 Digital components development and adaptation	5	29	5	9	14	14	6	1	5		20	2											2	2					11.0	
T3.2 Building Renovation Components	5	29	4	8	2	6		2			1	7	5			5				9									39.0	
T3.3 Integration and technical testing	8	29	4	8	2	6		2		1	7	5				5													49.0	
T3.4 Service demonstrations for technical validation and deployment	13	29	4	7	1	2					3																		20.0	
WP4 - Pilots Deployment and Validation	8	24	4.0	6.0	22.0	9.0	0.0	12.0	4.0	35.0	2.0	10.0	10.0	24.0	22.0	0.0	7.0	20.0	21.0	15.0	35.0	0.0	0.0	25.0	17.0	11.0	22.0	6.0	23.0	211.0
T4.1 Pilots preparation, evaluation framework and baseline analysis	8	13	1	2	8	3		2	4	2	3	1	4	4		1	3	4	2	4			4	2	1	2	2	4	61.0	
T4.2 Engagement of citizens, stakeholder and community	10	30			3		6	2	4	2	1	1	4	1		1	3	2	2	3			2	5	5	2	2	4	55.0	
T4.3 Operational Pilots	14	34	2	4	24	3		1	23		5	7	12	17		4	11	22	9	25			16	7	3	15		12	222.0	
T4.4 Overall monitoring, evaluation and social acceptance assessment	14	34	1		4	3		5	1	4		1	1	4	1	1	3	3	2	3			3	3	2	3	2	3	53.0	
WP5 - Sustainability and Market Uptake of Services and Funding Schemes	14	36	11.0	19.0	5.0	20.0	3.0	11.0	6.0	9.0	0.0	7.0	7.0	9.0	8.0	1.0	8.0	3.0	6.0	9.0	6.0	8.0	8.0	9.0	3.0	2.0	3.0	4.0	94.0	
T5.1 Optimisation and customisation of packaged services for large market penetration	21	36	2	4	3	4		2	1	2		2	2	1	2		1	1	4	3	2	1	1	2	1		1	1	2	45.0
T5.2 Package reconfiguration for scalability and replicability	21	36	2	4	1	4		8	2	2		1	4	1	5		1	1	1	1	3	2	6	5	1	1	1	1	59.0	
T5.3 Pursuing alternative financing Schemes	14	36	1			9					3		1							4									20.0	
T5.4 Exploitation planning	14	36	3	2	1	1		1	1	1		1	1	1	1	1	1	1	1	1	3	1	2	1	1	1	1	1	32.0	
T5.5 Online OSS platform and adoption of results by 2 OSSs	14	36	3	9		2		2	2		2				5					2									38.0	
WP6 - Dissemination, Exploitation and Communication	1	36	3.0	0.0	5.0	6.0	15.0	6.0	3.0	4.0	1.0	3.0	2.0	3.0	1.0	2.0	2.0	1.0	1.0	3.0	2.0	2.0	1.0	1.0	1.0	1.0	1.0	4.0	94.0	
T6.1 Dissemination and communication strategy	1	36				2	1		1						5														10.0	
T6.2 Communication and Dissemination boosters	1	36	1		3	3	6	1	2	2	1	1	1	1	13	1	1	1	1	1	1	1	1	1	1	1	1	1	51.0	
T6.3 Interoperability with other projects and synchronisation with European initiatives	14	36	1		1	1	1	4			1	1	1	1						1									12.0	
T6.4 Recommendations and Lessons Learnt	24	36	1		1	2	6		1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	21.0	
TOTAL			57.0	74.0	85.0	67.0	30.0	39.0	17.0	58.0	17.0	69.0	30.0	40.0	50.0	22.0	21.0	38.0	42.0	32.0	56.0	14.0	13.0	53.0	27.0	19.0	39.0	15.0	40.0	1064.0

3 Collaboration among Partners

Project and quality management activities will ensure the proper implementation of the project plan and the satisfaction of its objectives. The following paragraphs describe the plans and activities needed for the smooth and effective evolution of the project across its lifecycle.

3.1 Decision Process

Decisions will normally be taken by the responsible team members, and organization bodies based on the description of work to be performed, as stated in the Contract, the Consortium Agreement, the Description of Work (DoW) and the Quality Management Plan (as communicated regularly) and the individual Work Package or Task plans. In case there is a dispute between two or more team members, an escalation procedure must be followed, as presented below.

3.2 Conflict Resolution

In the course of the project the consortium will have to agree on and develop technical, scientific and commercial ideas and specifications. Usually, agreement will be reached first by informal contact, followed by official confirmation via electronic mail, letter or agreed written minutes. For important issues, i.e. technical issues and conflicts within given contractual commitments that do not involve a change of contract, a change of budget and/ or a change of resources or even the overall focus, the agreement may take the form of a short report that needs to be signed by those responsible for decision-making. Non-technical factors such as resource allocation and contractual terms will also need to be agreed and documented in writing. Individual Technical Leaders and Work Package Leaders will immediately inform the coordinator if potential conflict situations arise. Technical issues/conflicts within given contractual commitments that do not involve a change of contract, a change of budget and/ or a change of resources/ overall focus, will be discussed/ solved on the WP level first. Decisions will be made by majority vote of the Technical Leaders of all principal and assistant contractors.

If the decision being taken is unacceptable to partners found in the minority positions, the resolution of the conflict will be escalated according to the procedure summarised in the following steps:

- First, the implementation team will inform the WP leader for the conflict that occurred.
- The WP leader will organize the WP team meeting and the issue will be discussed. In case of agreement the team will inform the Coordinator.
- If no decision is taken the WP leader will inform the Coordinator. The latter will make contact with the responsible persons and will try to resolve the conflict.
- In case of agreement the Coordinator will inform the Executive Board. Otherwise the issue will be escalated to the Executive Board for resolution.
- The Executive Board will meet with the relevant parties in order to discuss the conflict. If no agreement occurs the issue will go to the General Assembly who will have the authority for the final decision. The final decision must be accepted by all parties.

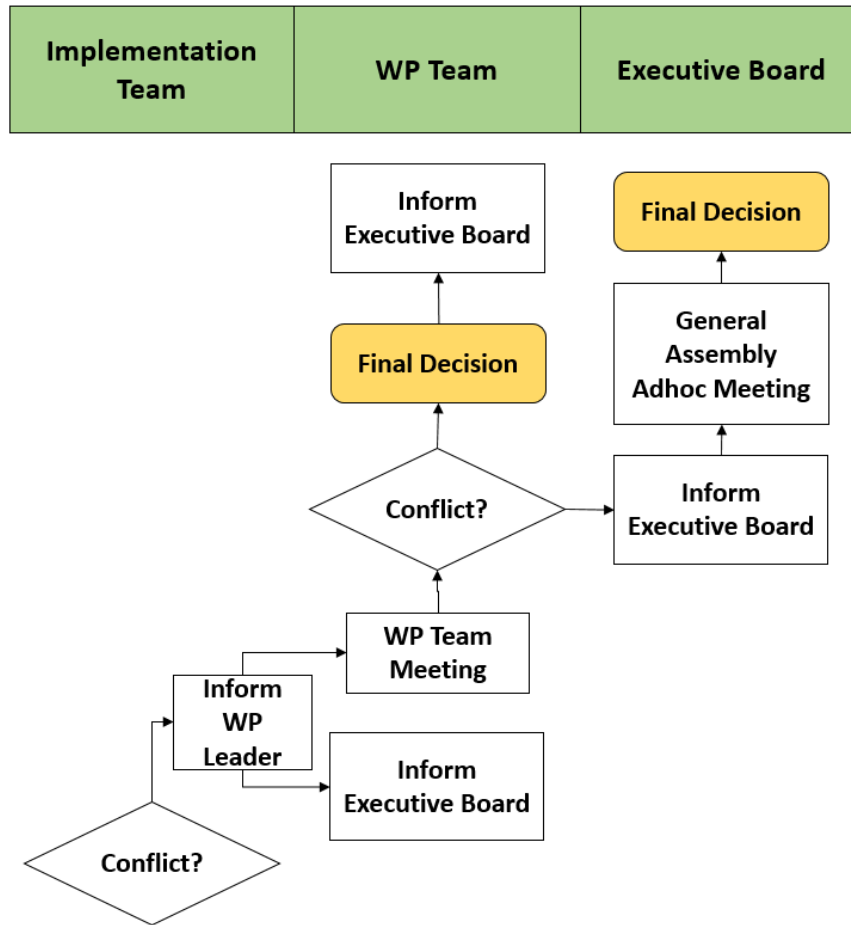


Figure 2 FORTESIE Conflict Resolution Procedure

The decision scope at task level is that all partners being involved in a task are eligible to contribute to a decision regarding that certain task; in case that a capable decision cannot be taken at that level, the issue has to be forwarded to the WP leader who will act as mediator. The same procedure appears at the level of work packages, where resolution is first attempted via mediation helped by the project coordinator. The ultimate final decision for all unresolved conflicts will be made by the project General Assembly.

The only exception, where the European Commission shall be consulted, is when the project coordinator brings forward arguments that a decision of the General Assembly may jeopardise the whole project, for example, by deviating from targets and outcomes expected by the European Commission. In this case implementation will be delayed until feedback from the Commission is received. The project coordinator will be responsible for seeking advice from the Commission immediately after such a decision has been made.

In the case of persistent disputes, the consortium will inform the Project Officer, solicit the advice of reviewers and call for an extraordinary meeting. If it becomes necessary to involve the responsible EC officer, a formal request for a meeting will be submitted.

3.3 Communication among Partners

3.3.1 Information Flow

Information flow within the Project will be ensured by:

- The exchange of internal technical and business documents.
- Notification of relevant new publications in the literature, or by the standardising bodies.
- Reports from external meetings.
- Project Skype meetings.

All technical documentation generated by the project should be exchangeable in electronic format, according to the set of guidelines provided in section 5 of this document. The Quality Assurance Supervisor will enforce adherence to these guidelines.

Skype meetings between working sub-groups will be minuted and the minutes will be exchangeable in electronic format.

Exchange of information will mainly occur via e-mail and through the project's proofhub portal where all partners will have secure and author rights to create/edit/review documents/news etc. This collaborative space includes:

- A project library with all baseline documents (DoW, Legal documents, CA, contract with EC, etc.), deliverables, WP documents, meeting minutes and presentations, reports, dissemination material, etc.
- Contacts: partner information & profiles
- Events and Calendar for important dates / milestones / deadlines.
- Tasks assignments

The Project Coordinator will be responsible for the structure and maintenance of this portal and for the access to it.

Furthermore, selected information such as public deliverables, published papers, events and news will be disseminated through the project's public website: <http://www.fortesie.eu/>.

Telephone will be used for urgent needs only. Urgent correspondence over e-mail will be sent with a request for explicit acknowledge. Ordinary mail will be used for strictly formal correspondence, i.e. when executive signatures are required. Adherence to the agreed communications standards will be enforced by the Project Manager and the Quality Assurance Supervisor.

3.3.2 Electronic Communication Platform (ECP) - ProofHub Platform

A project ProofHub platform in the form of an Electronic Communication Platform (ECP) is set up to act as information exchange and data/document-store repository for all working documents, minutes and reports. It maintains relevant lists such as project calendar, contacts, item list etc. The address of the ProofHub platform is:

<https://eurodyn.proofhub.com/bapplite/#app/overview/project-6585418367>

The ProofHub platform is maintained by the Coordinator. Access to it can be requested through the Coordinator.

Permission levels

There are different permission levels. WP leaders and project Coordinators can use the ProofHub platform site to read/download/upload documents.

The administrators can assign different permission levels to the partners e.g. only reading and downloading access.

Version control

The versioning control of the documents is active, a version of the document is created each time a document is uploaded with the same name in the document library.

Browser

Access is supported by any browser, for editing the use of Internet Explorer is recommended. It is recommended to add the portal site to the list of trusted sites.

ProofHub is easily accessible through a web browser via https protocol. The structure contains a general top-level site – FORTESIE Overview– mainly

It can be accessed via any web browser without the need for any additional installations. The home screen contains widgets that can be adjusted by the individual user. The defaults are the following:

- **Project:** The users will be able to navigate directly to the FORTESIE project
- **Discussion:** The area for open discussion among the whole FORTESIE partners and/or specific teams allocated to the discussion. This is good service for voting and information to the partners.
- **Agenda:** The users can have an overview of the tasks, milestones, and events.
- **My tasks:** The users can have an overview of the various tasks they are involved in. The columns are configurable to show information that is needed without overwhelming the users

The structure contains a general top-level site – FORTESIE Overview– mainly related to issues relevant to the whole project. Additional sites are tasks, gantt, calendar, notes and files. Files are dedicated to Admin, contractual, legacy, meetings, dissemination, reporting and the WPs.

While adding a new Task list, the option “Mark as private” should be enabled so that it is visible only to the specified subscribers.

3.3.3 Folder structure

The following folders have already been created:

- **Action Items:** This folder will contain a list for issue tracking. It refers to actions related to general project issues. It is not supposed to be used, for example, bug-tacking in software development.
- **Admin:** Information regarding administrative tasks will be stored in this folder.

- **Documents:** This folder will contain internal documents that all the Partners of the consortium will have access to, such as templates, the initial Proposal, the Grant Agreement, the Consortium Agreement, relevant legislation, etc. It will also contain public documents for dissemination purposes.
- **Lists:** This folder will contain different lists such as members of the Gas, WP leaders partner contacts etc.
- **Meetings:** This folder will contain documents related to the meetings of the consortium, such as agendas, minutes, presentations, etc.
- **Reporting:** This folder will contain all the documents related to the periodic reports of the project.
- **WP1-6:** Each WP folder will contain the documents related to the respective WP. Additional folders can be created for each task. It will also contain the documents related to the production of the deliverables of the WP.
- **Risks table:** This folder will contain an updated list of risks and proposed mitigation measures. During the project action and risk table items are incrementally added to the list. They will be collected from all different kind of meetings or assignments. Each item has an ID, to easily retrieve from where the issue is coming from. It consists of the identification of the meeting, WP number and a number for the current issue: e.g. EB03_2.1 is the 1st issue originating from the Executive board meeting 3, in WP2. Each item is assigned to one or more persons. The items have usually a due date and a status, which can be:
 - Not started: Currently not processed;
 - In Progress: Issue is currently being processed;
 - Completed: Issue resolved, or information delivered;

3.3.4 Teleconferencing (TelCo)

Conference calls will be led though the tool Zoom. It is hosted by ED. To schedule a TelCo the meeting host will coordinate a phone call by his/her organisation or an email has to be sent to the Coordinator with the following content:

- Title
- Date
- Time and duration

The TelCo is started by the host or the Coordinator. The host is always the chairman.

3.3.5 Software and data sharing

The development of the software and the code generation will be done using a software version configuration tool and code review tools (for quality and security) (e.g., Git, Maven, Jenkins, etc.) and a repository (e.g. Nexus). A feature-branch or git flow workflow will be adopted, ensuring that all necessary components of the FORTESIE system will be available for the distributed development teams. At all times a ticketing/issues system (e.g., Atlassian Jira ticketing system or Github issuing system, FusionForge) will be used by all partners for reporting and managing issues, bugs, etc.

3.3.6 Meetings

The consortium has planned regular consortium meetings every six months, to review the progress of the various activities and to update the goals for the next short-term period according to the needs that have arisen. Additional meetings will be held in order to resolve any issues that may arise during the course of the project, or to facilitate the progress of a specific working group.

Any partner which is a member of a Consortium Body:

- Should be present or represented at any meeting of such Consortium Body;
- May appoint a substitute or a proxy to attend and vote at the meeting;
- Shall participate in a cooperative manner with an active role in the meetings.

The following table summarises the planned timetable of the various project meetings.

Table 6 Planned timetable of project meetings

Project Body	Participants	Possible Meeting Objectives	Frequency
General Assembly	Representatives from all partners	Review and plan project work	Twice a year
Executive Board	Executive Board and other parties where necessary	<ul style="list-style-type: none"> • Review and plan project work • Conflict resolution issues 	At least monthly virtual meetings and physical meetings whenever required
WP Meetings	<ul style="list-style-type: none"> • WP Leader • Representatives from the partners' technical teams 	<ul style="list-style-type: none"> • Monitoring WP progress • Specific technical scopes and transfer of knowledge 	Whenever required within each WP.

3.3.7 Measurement of Project Progress

A. Interim Reports

Bi-annual management reports should be submitted by each partner to the Coordinator, to be forwarded to the EC. The purpose of this report is to regularly inform the EC project officers regarding

the progress of the project. They are brief consolidated reports based on the internal reports provided by the WP Leaders including:

- Short technical progress of the project per WP
- Problems encountered during the project
- Changes in the work plan and/or contract
- Risk management update
- Estimation of effort consumed and major expenses during the period

B. Periodic progress report to EC

Periodic progress reports are extended official reports to be forwarded to the EC reporting the progress of the project. They should be submitted at the end of every reporting period, every 18 months, and include the final report. The whole project management activity and information flow will be also supported by applications already developed by the project partners. They are extended reports including:

- Official costs statements including all expenses in the period
- Detailed technical progress of the project per WP
- Reports on the problems encountered during the project
- Risk management results
- Key Performance Indicators (KPIs)

The periodic progress report will be based on the template provided by the EC [Periodic Report Template (RIA, IA, CSA, SME instrument, MCSA) including Periodic Technical Report (parts A and B) and Periodic Financial Report, latest version].

3.3.8 Time reporting

For personnel costs (declared as actual costs or on the basis of unit costs), the partners must keep time records of the number of hours declared. The time records must be in writing and approved by the persons working on the action and their supervisors, at least monthly (article 20 in https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/agr-contr/general-mga_horizon-euratom_en.pdf).

A time sheet can be found at:

http://ec.europa.eu/research/participants/data/ref/h2020/other/legal/templ/tmpl_time-records_en.odt

This template is not mandatory; beneficiaries may use their own model, provided that it fulfills the minimum conditions and it contains at least the information detailed above.

- All partners are obliged to keep timesheets for all personnel involved (signed by the person).
- These timesheets can be subject of audit by the EC.
- One person cannot be overloaded in many projects.

4 Quality Review Process within the FORTESIE project

Within the FORTESIE project a number of control measures to manage, monitor and communicate the project activities and deliverables will be included. This section shall specify the quality control process for the review of the project products/deliverables. The controls and measures adopted to ensure the success of this process will also be described. The purpose of adopting controls is to ensure that the project:

- Is producing the required outputs which meet the defined Acceptance Criteria (as described below);
- Is being carried out to schedule and in accordance with the resource and budget plans;
- Maintains its viability and its focus on targetting the pre-set objectives as defined in the Grant Agreement.

4.1 Reviews of Hardware/ Software

Hardware/Software reviews will be conducted during the testing procedures as will be specified in the related deliverables of WP2, WP3 and WP4. The Quality Assurance Supervisor is responsible for the verification and validation of the test results and signing the test report. Technical aspects of the hardware/software will be reviewed by the Project Executive Board according to the technical, infrastructure and design specifications decided to be included.

4.2 Reviews of Documentation – Project Deliverables

Each project deliverable has been assigned to one leading responsible partner. This partner takes the responsibility that the deliverable is of high quality and delivered in a timely manner. The responsible partner assures that the content of a deliverable is consistent with the work performed by the team of partners working on the relevant tasks and that the relevant objectives are met. Any issues endangering the success of the work package or the project have to be reported immediately to the project management and discussed within the Executive Board.

Project documentation will be reviewed against the following criteria:

- Format of the document according to the document templates (see Annexes).
- Consistency with previous relevant documentation (for example, technical specifications combined with the requirements definition).
- Identification and correction of typing mistakes, etc.
- Technical aspects of the documentation will be reviewed from the Technical & Scientific Committee in order to ensure that the document meets the technical goals of the project, and that all technical information is advancing the current state-of-the-art and the recent technological research level.

The procedure and timeline for the review of project documentation is illustrated in the following figures and described in the following paragraphs.

The partner, who is responsible for preparing the deliverable, drafts a “table of contents” (2 months before the deadline), assigns tasks to all involved partners and sets the respective deadlines. Involved partners provide their feedback within the deadlines and the responsible partner prepares the first draft of the document. This draft is sent to the entire consortium for comments and improvements/

additions. The feedback period for project partners lasts at least five working days. Feedback is sent directly to the responsible partner who revises the document and prepares the semi-final version (15 days before the deadline).

The Quality Control Process begins with the semi-final version of the deliverable. At least two Internal Reviewers, who are not members of the authoring team but have expertise in relation to the deliverable, have been assigned in advance. In a case where the deliverable is produced with the collaboration of all the partners, then more than two Internal Reviewers will be assigned to cross read and peer review the complete version of the deliverable. The Internal reviewers send their comments to the partner responsible. This partner then improves the document based on their comments. In case the comments/ suggestions cannot be realised, the reasons for this must be documented. If necessary (i.e. if there are too many comments on the first round), another round of comments from the Internal Reviewers takes place.

The version that is prepared is then submitted for a final round of comments by the entire consortium. If there are comments, the partner responsible addresses them appropriately and prepares the final version of the document, which is sent to the coordinator (7 days before the deadline).

The coordinator then submits the document to the EC.

The process described above is depicted with the following figures:

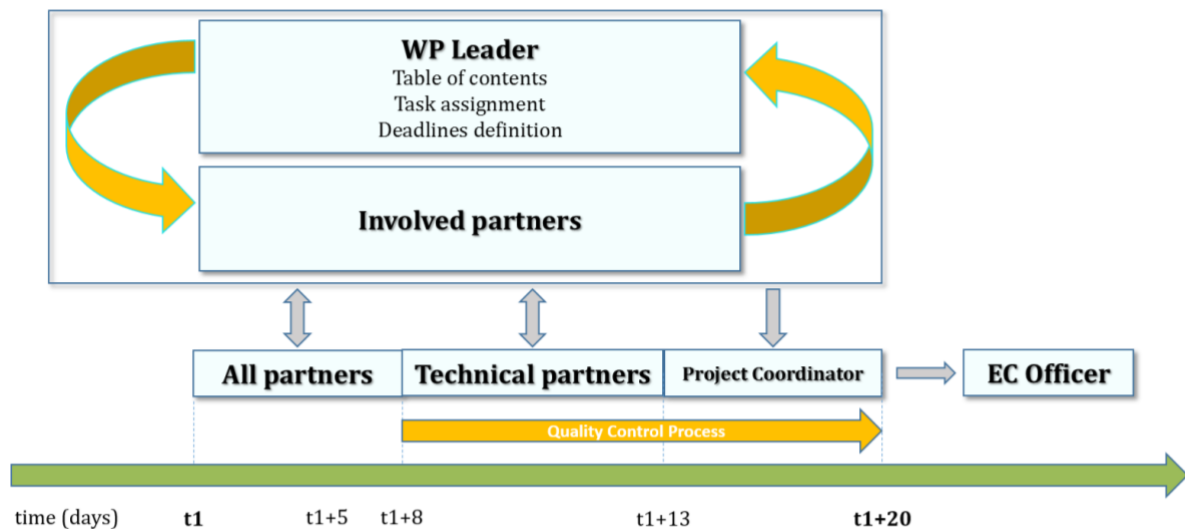


Figure 3 FORTESIE Deliverable Preparation and Review Procedure

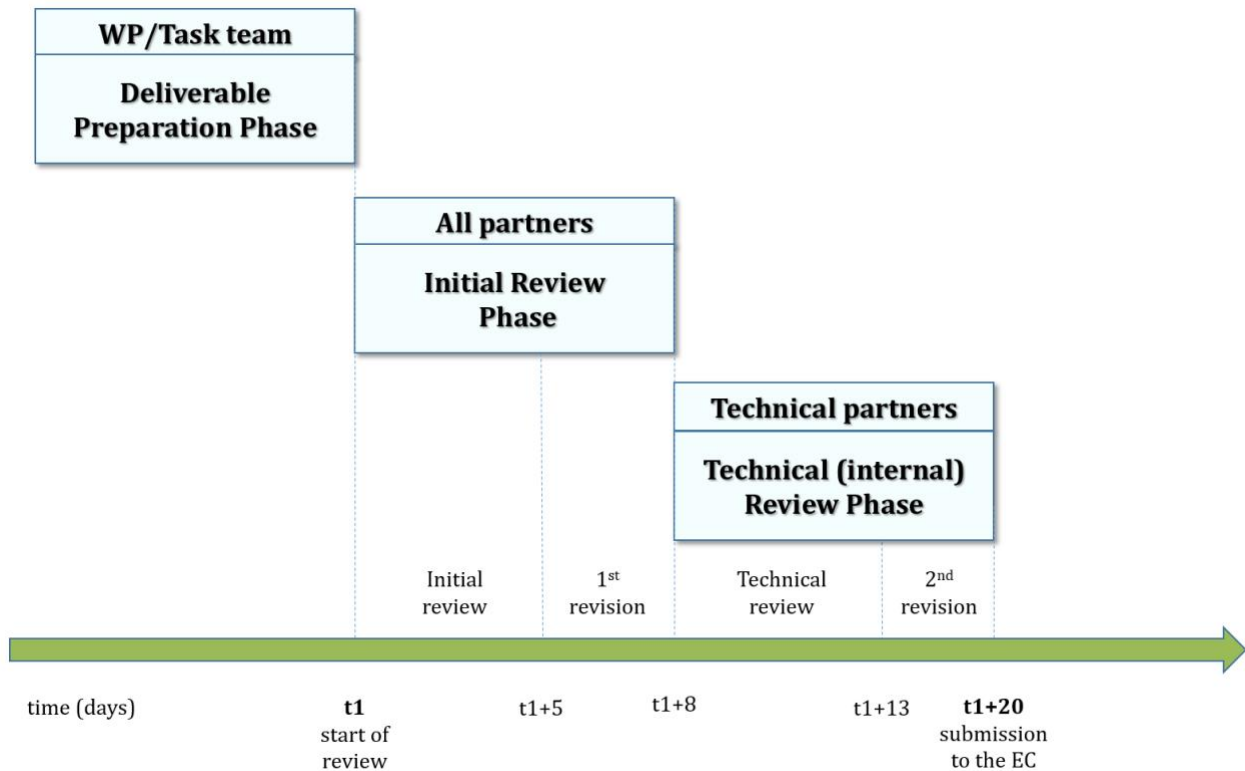


Figure 4 Indicative Timetable for internal Review Procedure

4.3 Reviews of Research Papers

The following procedure was established as an internal check of the quality of research papers and their relevance to the project:

- A summary of the paper (since the paper may not be completed prior to the submission date) should be sent to the Quality Assurance Supervisor and inform him about the intent to submit the paper;
- The QAS will assign two internal reviewers;
- The QAS and the two internal reviewers will notify the authors of the paper within ten days in case they have objections about the quality and/or the relevance of the paper with the scope of the project.

5 Configuration Management

Configuration Management deals with the identification and tracking of changes related to all project results including the deliverables, documents, testing procedures and any other related activity.

The Quality Assurance Supervisor will be responsible for the overall monitoring of all configuration management activities described in this section.

5.1 Document Configuration Management

Document configuration management will be ensured through the tracking of the versions of the various project documents:

- Deliverables (as stated in the deliverables list in the FORTESIE GA).
- Meeting minutes.
- Reviewed documents.

Document versioning will be tracked through the monitoring of the Configuration Matrix in which all versions of each document will be tracked.

5.1.1 Deliverables

Table 7 Deliverables Naming Conventions

Coding	FORTESIE-[Deliverable Code]-v A.BB
A	S/N for major release of the deliverable (submission to the EC)
BB	S/N for updates during the preparation/ reviewing phase
Example	FORTESIE -D1.1-v1.00 (for submission to the EC) FORTESIE -D1.1-v0.90 (for internal updates and submission for internal review)

5.1.2 Reviewed Documents/ Forms

The below naming convention will be used for the reviewed document (comments and track changes on the existing document) or the Review Form (as defined in Annexes).

Table 8 Reviewed Document Naming Conventions

Coding	FORTESIE-[Deliverable Code]- XX -[Organisation Acronym]-v A.BB
A	S/N for major release of the document (e.g. submission to the EC)
BB	S/N for updates during the preparation/ reviewing phase

XX	<p>TR: Technical Reviewed document</p> <p>QR: Quality Reviewed document</p>
Example	<p>FORTESIE-D1.1-TR-ED-v1.14 (Technical Reviewed document by ED)</p> <p>FORTESIE-D1.1-QR-ED-v1.31 (Quality Reviewed document by ED)</p>

5.1.3 Meeting Minutes

Table 9 Meeting Minutes Naming Conventions

Coding	FORTESIE-[Name of Meeting]-Minutes-[Starting Date]-v A.BB
A	S/N for major release of the document
BB	S/N for updates during the preparation phase
Example	FORTESIE-1 st Plenary Meeting-Minutes-10Feb17-v1.00

5.1.4 Tests and validation

Specific testing methodologies will be provided during the specific tasks allocated for this purpose. However, the following types of tests are already scheduled within the project description:

- **Component tests:** These tests are used to technically test operation and requirement conformation of elementary items of the system. The tests are under the responsibility of the developer of each individual HW and SW component.
- **Integration tests:** These tests are under the responsibility of the integrator. These tests are used to ensure the compatibility and interoperability of different items, which contribute to overall system functionality.
- **Pilot usage tests and validation:** These are the end-users validations, combining the overall system functionality and the real-life situations (users) and collecting the feedback from the actual use as well measuring the impact of the project, to the set KPIs, including those related to the behaviour change and system adoption. These will follow the validation methodology to be developed to ensure that the set requirements have been met and the KPIs measured.

5.2 Software Configuration

The software components monitoring will be done using a software version configuration tool and code review tools (for quality and security) (e.g. Git, Maven, Jenkins, etc.) and a repository (e.g. Nexus), which will be installed on a central server. A feature-branch or git flow workflow will be adopted, ensuring that all necessary components of the FORTESIE system will be available for the distributed development teams. Since the complete system consists of multiple sub-systems, there will be a development-friendly **staging** version of the complete system which will be possible to be deployed on a local machine (e.g. with dummy data) for developers to be able to test and extent their

components. There will also be a **production** version (as stable as possible) of the complete system deployed on the cloud which will integrate with the hardware and software deployed in the pilots working with real data. At all times (development and pilot runs) a ticketing/issues system (e.g. Atlassian Jira ticketing system or Github issuing system, FusionForge) will be used by all partners for reporting and managing issues, bugs, etc.

5.2.1 Name Space

The software components developed in the project will bear specific and unique names and versions. They will be compiled using Maven (when applicable) and their versioning will follow the Maven versioning scheme. The revision number and the designation “SNAPSHOT” are used for internal unofficial “working” builds.

Table 10 Software Components Naming Conventions

Coding	org.fortesie.GN[.MN]-V1.V2[.V3-SNAPSHOT]
GN	Group name e.g. “daa” (document authenticity analytics)
MN	A dot delimited module name e.g. “resource-tracker.impl” or “resource-tracker.api”
V1	Major version number
V2	Minor version number
V3	Revision number
Example	org.fortesie.daa.resource-tracker.api-1.0 or org.fortesie.daa.resource-tracker.impl-0.9.12-SNAPSHOT

5.2.2 Change Log

The changes introduced between versions of the components will be documented in a dedicated text file – the change log.

5.2.3 Releases

The stable releases comprise modules successfully undergone the integration tests. Their binaries will be stored in a Nexus repository and should be accompanied by a detailed documentation on both user and technical levels.

6 Quality Attributes and Key Performance Indicators – Risk Management

6.1 Quality Attributes

Several qualitative attributes will be used to assess the quality of the project results, in general terms, based on the nature of the FORTESIE project and the characteristics of its various tasks, as well as the context of use of the project results.

The quality is addressed also by assuring the compliance of all the project activities to the development process. The main attributes that address this need are:

- (Planning) accuracy;
- Correctness (functionality, performance, interoperability);
- Conformity to requirements and defined methodologies;
- Acceptance;
- Efficiency and effectiveness of tools and technologies

All these attributes will play an important role in the measurement of the project Key Performance Indicators (KPIs) described in the following section.

6.2 Key Performance Indicators

Monitoring of the progress of the project objectives will be done by the technical manager through Key Performance Indicators (KPIs). KPIs are an invaluable tool that contribute immensely to the performance monitoring process. However, for KPIs to be effective, they need to have clear definitions and measurable target values.

KPIs will be monitored bi-annually and will be presented in the Interim Report and in the Periodic Management Report. The following metrics will be used as the starting point.

Table 11 Key Performance Indicators

WP - Activities	Performance Indicator	Framework for Metrics	Target Values
WP1 - Project Management	1 Quality of deliverables	1-1 Percentage of re-work requests (over the total number of deliverables) during quality check	≤ 20%
		2-1 Number of use cases identified	≥ 7
WP2-Design of Combined Service Packages	2 Extraction of adequate (functional and non-functional) user requirements	2-2 Number of personas identified	≥ 21
		2-3 Number of user stories identified	≥ 42
		2-4 Number of state-of-the-art renovation technologies and services exploited and implemented in pilot sites	≥ 7
		2-5 Number of stakeholders involved in novel business models	>30
		3-1 Deviation of customised components' content and of their related interfaces from initial end-user requirements and system architecture	≤ 10%
WP3-Components Development and Integration	3 Compliance of system components functionality to requirements and architecture	3-1 Deviation of customised components' content and of their related interfaces from initial end-user requirements and system architecture	≤ 10%
		4-1-1 Users acceptance average	Above average
WP4-Pilots Deployment and Validation	4-1 End-user evaluation and feedback reporting	4-1-2 Users experience evaluation (6 metrics)	Above average
		4-1-3 Users satisfaction	Above 50%
		4-1-4 Percentage of services validated positively	>75%
		4-2-1 Percentage of involved stakeholders in validation	>80%
	4-2 Services Validation	4-2-2 At least 5 Performance guarantees for smart contracts (energy, CO2, comfort, costs, deployment duration) and 10 KPIs related to ESIE measured and included in smart contracts guarantees.	>15 KPIs measured with significant improvements as per pilot cases.
		5-1-1 Number of pilots packages adopting novel financing schemes	≥4
	WP5 - Sustainability and Market Uptake of	5-1 Novel financing schemes	5-1-2 Number of successful activities with novel financing remaining after the project

Services and Funding Scheme		5-2-1 Number of OSSs (interactions per month) at the end of the project	>5
	5-2 European businesses and other supply actors involved during the project (acting or reached by dissemination activities) after the project	5-2-2 Number of ESCOs involved (during after the project)	>10 30
		5-2-3 Number of funding /financing authorities (during after the project)	>5 12 (estimated)
		5-2-4 Number of Suppliers contacted and/or involved in packages (during after the project)	>100 1000 (estimated)
	5-3 Online OSS visitors in at least two pilots	5-3-1 Number of visitors in the online /physical shop	>300 1000
WP6– Exploitation, Dissemination and Communication	6-1Policies recommendations	6-1-1 Identification of policy makers of each selected country, and number of meetings with selected ones	One meeting with selected policy maker and relevant partners
		6-1-2 Number of policy recommendations generated	>4
	6-2 Exploitation and business models	6-2-1 Number of finalised new business models	At least 10 (pilots plus replications)
	6-3 Effectiveness and Impact of Dissemination activities	6-3-1 KPIs set in dissemination achieved.	>95%

6.3 Risk Management

Risk Management will cover the risks that will be constantly assessed and evaluated within the whole project duration.

Risk Management will be the responsibility of the Executive Board. Timely awareness of and reaction to potential problems will be crucial for risk management effectiveness. In the event of technological changes, the Executive Board will task one or more WP Leaders to investigate the development and to advise the Executive Board on appropriate actions. The Project Coordinator will ensure the communication of the risks to the project teams and develop project staff awareness of risk management. Risks and risk strategy plans along all types of project risks will be continuously reported on, the Interim and Periodic Activity Reports. The methodology for risk management consists of four steps:

- Identification: Identification of areas of potential risk;
- Quantification: Assessment of the probability of events and examination of consequences associated with their occurrence;
- Response: Methods to reduce or control the risk;
- Control and report: Documentation of lessons learnt.

Within the FORTESIE DoW, specific risks have already been identified and are considered as the baseline to start with. These risks are shown in Table 10. It is certain that during the project evolution further risks will come up and identified requesting immediate in many case solutions. To this respect mitigation strategies and corrective actions are needed to be foreseen early enough.

Table 12 Technical and Pilot Cases Risks

Risk Nr	Description of risk (Probability Impact)	WP Nr	Proposed risk-mitigation measures
1	Global soaring energy prices during and after implementation: M M	WP1, WP2, WP3, WP4, WP5, WP6	The Consortium shall watch international energy prices and can adapt selling/promotion documents for pilots. Higher energy prices should accelerate Pilot deployments.
2	Low engagement of stakeholders during the co-creation process: L L	WP2, WP4, WP6	The huge expertise of the relevant partners dealing with the end-users, with long working history in the field and a track record of successful projects will ensure active user participation. Robust and rigorous methodological approach to assure the engagement and active involvement has been put in place and elaborated in Tasks 2.1 and 4.2. Moreover, using the available communication activities the project will raise awareness on its objectives among the end- users, enabling its expansion of the base of users, in order to handle any potential dropouts. Keeping high energy prices will accelerate user engagement in the energy transition.
3	FORTESIE solutions fail to conform to user’s needs and requirements: L M	WP2, WP4	The development of the FORTESIE solutions will follow an iterative and co-creation approach in order to integrate end users’ feedback, by using established social science methods in all activities to ensure acceptance of process, technology and solutions with core stakeholders.
4	FORTESIE components are difficult to integrate : L H	WP3, WP4	Detailed analysis and specification of the architecture and the different components is planned. Preliminary versions of the components will be released during the project, to focus on the integration testing. The procurement of equipment will take place after analysing their available interfaces and communication standards. These results will be verified by the Consortium. In addition, most tools are already provided to FORTESIE with a certain maturity level. A final version will be released in M29, so the results are solid and useful. In case this occurs further research and elaboration of the architecture to consider any relevant open standards and new interfaces will be considered to revise the specifications. Continuous testing and rework of the interfaces will ensure the integration. Simplified solution (simplified baseline calculation for example) will be developed if needed, with a focus on climate rather than energy (switching from fossil energies to electricity).
5	Insufficient or ineffective demos’ support: M M	WP4	If the risk occurs, scientific partners will undertake more intensive user support, update the supporting material accordingly, and even improve the FORTESIE solutions, e.g. in terms of user

			friendliness, etc. Also, Keeping high energy prices will accelerate user engagement in the energy transition.
6	Replication of solutions to different geographies is not as expected: M H	WP4	Dedicated tasks ensure all the parameters and particularities of the demonstration sites are considered in the design of scenarios. If the risk occurs, alternative replication scenarios will be tried in the business workshops and offline among various combinations of market representatives involved. Also, keeping high energy prices will accelerate user engagement in the energy transition.
7	Poor feedback gathered for demo evaluation: L M	WP4, WP5	The early planning of the evaluation methods and means for the collection of network data and user feedback will leave little room for this risk occurring. If the risk occurs, partners will devise new/more persistent evaluation means (i.e. phone interviews, face-to-face meetings) in order to get the needed feedback and will also exploit their large partner networks to this purpose, rolling-down demo needs-tailored data gathering and aggregation support.
8	Difficulty in ensuring the viability of the proposed business models: M M	WP4, WP6	The various representatives from relevant stakeholders will properly record and formulate the expectations for delivering services of value which are in line with the business internal strategies and the market trends. In order to reduce the likelihood of this risk, the viability will be presented and discussed in the open events that will be organised where external parties will be invited to workshops to give their feedback.
9	Difficulties matching financing with interventions: L I	WP5	By making use of different financing options, from green funding, crowd funding and by tapping into EU crowdlending, specific solutions will be implemented, allowing for project financing flexibility, thus ensuring that interventions are replicable and adjusted to local contexts. GOP's EU licence allows for a uniform funding solution both at local and global level. Keeping high energy prices will favour new public policies and public funding initiatives to match EU priority #1, The Green Deal. Prices could be kept at high level with taxes, and the use of the tax could accelerate the transition of effective solutions (ex-post measurements).
10	FORTESIE results are not on the path to be useful after the project finishes: L H	WP5, WP6	Partners' participation in other projects provide already the potential community of users: both the scientific and the industrial partners, have high motivation to keep using the FORTESIE technology due to its benefits for their day-to-day activities and/or their business agendas, and are well-connected with user communities that promise a broader uptake of the results. In case this risk occurs, the involved organisation (at least one in each demo) which are interested to commercially adopt and promote the services in their market within already established activities, will ensure that the services are altered or combined in a way to generate useful paths for the market.
11	Business adoption of FORTESIE proposals is not as expected: L M	WP6	WP6 focuses on monitoring business adoption and providing a roadmap for tools and demos to exploit their results. They will work closely with demos to guarantee the adoption, at

			demonstrator side, is full and the way to marketise the result is also clear for the future beyond the project.
12	The reduction in energy consumption is not adequately considering the occupant comfort levels and gathering users support to implemented solutions. L M	WP2, WP3, WP4	To achieve this, a multi-objective function that takes into consideration the consumption, costs, occupancy and weather data, will be applied. This would be achieved in some cases, by providing relevant recommendations for the optimum equipment operation and in some cases by configuration of the current system changing the current (usual) levels of occupant comfort levels and the users' contracts to be designed considering the proactive green formula. Simplified solution based on kWh consumption only, regardless of degree days, and comfort should also be considered.
13	Weaknesses in domestic procurement process (delay in the public procurement procedure) : M M	WP4	Although there are fairly well-developed regulatory and policy frameworks for public procurement in Europe, a significant gap persists between the rules on paper and actual practices due to a series of challenges. Prior to the commencement of the procedure, an expert commission is appointed for public procurement, together with individual roles and expenses in the procedure. Before conducting a public procurement procedure, it is necessary to conduct a market analysis and technical analysis at the location in order to make a very precise technical specification of the subject of procurement. Prior consultation with suppliers is foreseen. Preparation of documentation with the help of an expert (technical, legal, financial) and the participation of a person competent in the field of public procurement. Simplified process, procurement, and baseline should be considered (focus on kWh consumption only).
14	Disagreements / Misunderstandings between consortium members. L M	WP1, WP2, WP3, WP4, WP5, WP6	The members of the consortium have to follow a common specific line about the tasks in order to avoid deviations from the project plan. The coordinating is necessary to contractual agreements (joint controllers or processors) amongst the beneficiaries, informed consent forms, procedures to comply with data subject's requests (such as the right to withdraw consent or the right to be forgotten), and information obligations. Development of simple proposal (simple baseline calculation) will remove this risk.
15	Failure to commercialize the developing product in public. L M	WP6	FORTESIE communication is very important. The strategy will determine how messages are communicated to target groups to achieve the strategic goals. Social media should be properly used to publish FORTESIE results and address to different target groups.
16	Delayed definition of: a) the data sources from the Pilots, b) the most suitable Use Cases and c) services L M	WP2, WP3, WP4	A template for data gathering and a sample of data from the pilots will be created to complement and further understand what really can be obtained and how it can be utilised. There will be two stages for information gathering. In the first stage, we will stay at a high level, and then we will move to the next level (low level, more detailed). This is due to time restrictions and because we cannot develop everything at one time, but having in mind all the needed

			inputs to other tasks and work packages so that we accomplish their needs and dependencies. For Pilots we should describe exactly what they need and what will be done in the FORTESIE project, identifying the main goals and stakeholders that are going to be involved.
17	Reluctance and lack of motivation of pilot stakeholders to data sharing and reuse as well as use and validation of the FORTESIE technical results. M H	WP2, WP3, WP4	A dissemination and communication strategy will be developed early in the project in order to identify the correct audiences and venues and devise strategies to reach them. Professional workshops, networking events, or other motivating initiatives would be organised. The project's pilots are carefully selected in order to represent the widest possible spectrum of stakeholders.
18	The requirements are partially or not sufficiently defined for the demonstration phase. L M	WP2, WP3, WP4	In case this risk occurs, conduction of bilateral or plenary meetings to clarify the situation will ensure that the potential impact is minimised by reconsidering the requirements that are not fully covered in the initial design.
19	Technical issues related to demos. H M	WP3, WP4	Discussion of the issues with the technical coordinator and the responsible organisation of each respective technical result to find out the problem and resolve them. This risk is usually happening with diverse and large-scale demos but will be continuously monitored.
20	New or increased costs, relevant to pilots, not anticipated in the initial budget (GA). M M	WP4	Discussion of the issue with the coordinator and the relevant partners; swap costs among different categories and packages optimisation will take early in the project in negotiation with suppliers.
21	Misalignment of models results compared to real life measures. L M	WP2, WP3	In cases where models are going to be used to extract results, extracted data should be also analysed from an expert perspective of the specific sector. Simplified solutions should be assessed (simple baseline calculations).
22	Design of components and tools is based on non-distinct user stories and requirements. L L	WP2	Delimitation of user groups will lead to specified user-stories that will prevent fault design of components. Simplified solutions to be thought up.
23	Lack of data protection - anonymization and GDPR compliance during data processing and aggregation. L M	WP3, WP4	Strict procedures should be applied that ensure data is securely transferred, anonymized and gathered always compliant with GDPR. Specialised legal expert team is involved which guide the project end to end considering the legislation in Europe and the demo countries as well as monitoring the demos establishment and users' recruitment.
24	Already proven solutions and components may lead to restriction paths regarding the provided applied field of the services. L L	WP2, WP3	Already proven solutions and components should be investigated for their application and suitability to the required task or services they're about to serve.

6.3.1 Consortium Risk Management

The FORTESIE consortium has considered consortium related risks that deal with (1) underestimation of some tasks, (2) low productivity and (3) low quality of work. These risks are already minimized during the selection of partners, most of which have been selected following specific criteria:

- They are leaders in their areas of expertise;
- They are selected after previous successful cooperation, with coordinator or with other trusted members of the consortium;
- They have evidence of long history of successful completion of research project.

However, these risks will be minimized and managed by using established methodologies for hardware/software cost estimation, continuous project planning, monitoring and control. Such methodologies are standard practice in the professional work of the consortium partners. Timely detection and reaction to potential problems will be crucial to effective risk management.

6.4 Integration Risks

FORTESIE acknowledges that the complexity of its systems, the fact that the technologies are the current state of research or entirely new and the big number of hardware/software components introduces a significant concern regarding integration risks.

The significant concern is minimised due to the risk avoidance strategy that is already applied and will continue to be applied during the project execution:

- FORTESIE consortium composition provides significant integration experience from a number of partners, such as ED, NTUA.
- Development of different modules and integration points are based on open and established standards and interoperable technologies. This is already specified and agreed at the consortium and besides the project will continuously monitor for any significant new standard around the project, in order to be immediately adopted.
- The FORTESIE architecture and plan envisages the definition of interfaces between hardware/software components at specification level in order to minimize the potential risks. Furthermore, it foresees revision of it at later stage to accommodate development changes.
- The project foresees the development of integration plan within WP3 before either initial or final phase of integration takes place.

In any case, beyond the risk avoidance strategy, FORTESIE will continuously monitor project risks.

Account of the major risks of the project operation, followed by appropriate mitigation strategies, will be included in the periodic Management Reports.

7 Conclusions

The Quality, Risk and Innovation Handbook outlines the quality management mechanisms and provides guidance to FORTESIE communication and reporting procedures, among the relevant partners involved.

8 REFERENCES

1. Author (2000). Title. etc.
2. Author (2000). Title. etc.
3. Author (2000). Title. Etc

For each reference, please choose the appropriate referencing style.

Journal

Author (Year). Title. Journal, Volume(Issue), (pp. page#-page#).

Book

Author (Year). Title (Edition). City: Publisher.

Book section

Author (Year). Title. In Editor name (Ed.), Book Title (Edition, pp. page#-page#). City: Publisher.

Conference paper

Author (Year). Title. Paper presented at the Conference Name, Conference Location. Retrieved from URL.

Web page

Author (Year). Title. Retrieved on Date from URL.

General

Author (Year). Title. In Secondary Author (Ed.), Secondary Title (Edition, pp. page#-page#). City: Publisher.

Appendix A. Deliverable template

HORIZON-CL5-2021-D4-02-01

Innovation Action



CBDC powered Smart PerFORmance contractS for Efficiency, Sustainable, Inclusive, Energy use

Dx.y Deliverable Title			
Report Identifier:	Dx.y		
Work-package:	WPx	Task:	Tx.y
Responsible Partner:	Organisation Full Name (Short name)	Version Number:	1.0
Due Date	dd/mm/yyyy	Document Date	Dd/mm/yyyy
Distribution Security:	PU/CO	Deliverable Type:	R, DEM, DEC, OTHER
Keywords:			
Project website: http://www.fortesie.eu/			



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Appendix B. Interim Report Template

HORIZON-CL5-2021-D4-02-01

Innovation Action



**CBDC powered Smart PerFORrmance contractS for Efficiency,
Sustainable, Inclusive, Energy use**



This project has received funding from the European Union's Horizon Europe research and innovation programme under grant agreement No 101080029

Interim Report (Partner)

Covering the reporting period from

DD/MM/YYYY to DD/MM/YYYY

Reporting Date

< DD/MM/YYYY >

1. Progress of Work Plan in the period (max half page)

1.1 General progress (max half page) - Summarise the objectives and the achievements, deviations, important problems and difficulties met.

1.2 Progress on all work packages against initial objectives – *Compare in a few lines the activities planned (based on Annex I of the Grant Agreement and the previous report) to the progress made, work package by work package; state of purchase of equipment; identify partners involved, including their roles; describe major subcontractors, stakeholders, etc. involved.*

1.3 Identified deviations, problems and corrective actions taken in the period – *If any, identify the nature and the reason for the deviation or encountered problems (technical, financial or organisational), identify partners involved, clarify impacts on the activities and deliverables, present the strategy to overcome them; in case of deviations described in the last report describe how you have managed to get back on track.*

1.4 Progress regarding performance indicators – *Assess performance indicators listed in D1.1 Quality, Risk and Innovation Handbook.*

2. Deliverables

Del. N°	Deliverable name	Lead Beneficiary	Type/ dissemination level	WP N°	Delivery date from Annex I	Delivered (yes/no) and status (draft/final)	Forecasted delivery date	Comments on progress

3. Milestones

Milestone N°	Milestone Title	Related WP N°	Lead Beneficiary	Delivery date from Annex I	Achieved (yes/no)	Forecasted achievement date (if not achieved)	Comments on progress

4. Critical Implementation Risks and Mitigation actions

4.1 Foreseen Risks (risks already identified prior the initiation of the project, see Annex 1)

Risk N°	Description of Risk	Related WP N°	Proposed risk-mitigation measures

4.2 Unforeseen Risks

Risk N°	Description of Risk	Related WP N°	Proposed risk-mitigation measures

4.3 States of the play for Risk Mitigation

Risk N°	Period	Did you apply risk mitigation measures (yes/no)	Did your risk materialize (yes/no)	Comments

5. Work plan for the next period (max 1 page)

5.1 Planned activities in the next period – Give an outlook on planned activities for the period until the next report (on-going work packages, tasks per partner, due deliverables), consider any strategy developed in section 1.3)

5.2 Planned meetings, activities related to market uptake and dissemination activities – Give an overview on your planned project meetings (date, location, main topic, etc.), planned activities to foster the market uptake and dissemination activities (date, location and main topics of fairs, conferences, etc.), at least for the period until the next report.

6. Dissemination and exploitation of results

6.1 Scientific Publications

Type of scientific publication (journal/conference proceedings/workshops/monograph/dissertation/ etc.	Authors, Title, Publisher, Place of publication, Volume/Number of issue, date, Relevant pages, ISSN or eSSN.

6.2 Progress regarding market uptake and exploitation – impacts of the projects' solutions towards market uptake. Describe here your progress to achieve these objectives.

6.3 Dissemination and Communication activities

Type of communication and dissemination activities	Number of activities

7. Overview on use of resources

	Partner Name	
	Actual	Justifications
WP1		

WP2		
WP3		
WP4		
WP5		
WP6		
Total		

Appendix C. Review Protocol template

FORTESIE Review Protocol



CBDC powered Smart PerFORrmanCe contracT's for
Efficiency, Sustainable, Inclusive, Energy use

Deliverable/Document Name	Dx.y	Version	A.BB
Review Start Date	DD/MM/YYYY	Review End Date	DD/MM/YYYY
Authors/Contributors	Name (Organisation) Surname	Assigned Internal Reviewers	Name Surname (Organisation)

REVIEW COMMENTS

Comment Number	Page Section	COMMENT	RESPONSE	Reviewer Name/ Company

Appendix D. Meeting Agenda template

Meeting Agenda



CBDC powered Smart PerFORrmance contractS for Efficiency, Sustainable,
Inclusive, Energy use

**Title of the Meeting (e.g. FORTESIE
Kick-off Meeting)**



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Day 1 (e.g. Mon, Nov 6th)

The aim of the first day is to

Start time <i>e.g. 14:00-14:15</i>	Arrival & Coffee	
<i>e.g. 14:15-14:30</i>	Welcome and Greetings	Host
<i>e.g. 14:30-15:15</i>	Name of Session 1 (time e.g. 45')	Responsible Organisation and presenter
<i>e.g. 15:15-16:30</i>	Name of Session 2 (time e.g. 1h 15')	Responsible Organisation and presenter
<i>e.g. 16:30-16:45</i>	<i>Coffee Break</i>	
<i>e.g. 16:45-18:15</i>	Name of Session 3 (time e.g. 1h 15')	Responsible Organisation and presenter
<i>e.g. 18:15</i>	End of meeting	



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Day 2 (e.g. Tues, Nov. 7th)

The aim of the second day is to

Start time <i>e.g. 09:00-09:15</i>	time-end	Arrival & Coffee	
e.g. 09:15-11:00		Name of Session 1 (time e.g. 2h 45')	Responsible Organisation and presenter
e.g. 11:00-12:15		Name of Session 2 (time e.g. 1h 15')	Responsible Organisation and presenter
e.g. 12:15-13:30		<i>Lunch Break</i>	
e.g. 13:30-15:30		Name of Session 3 (time e.g. 2h 00')	Responsible Organisation and presenter
e.g. 15:30-15:45		<i>Coffee break</i>	
e.g. 15:45-18:15		Name of Session 4 (time e.g. 2h 30')	Responsible Organisation and presenter
e.g. 18:15		End of meeting	



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Participants List - Meeting details

Organisation	Participant
ED	
NTUA	
CCO2	
IEECP	
SIN	
LEIF	
COOP	
LUH	
CTIC	
VEO	
OKT	
TGT	

INCL	
ENE	
GAR	
+48	
GOP	
JUST	
APES	
ECN	
CRD	
GSIS	
EEF	
MESH	
DEE	
GKW	
Meeting Details:	<p><i>Venue:</i> _____ <i>Date: DD/MM – DD/MM YYYY</i></p> <p><i>Address:</i> _____</p>

	<p><i>Tel/fax:</i></p> <p><i>Email:</i></p>
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Appendix E. Meeting Minutes template

Minutes of telco with (PARTNER NAME)



CBDC powered Smart PerFORrmance contracTs for Efficiency, Sustainable, Inclusive, Energy use



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Minutes of telco with (PARTNER NAME), dd.mm.yyyy			
Report Identifier:	FORTESIE Telco Minutes, 12.4.21		
Distribution Security:	Confidential	Status - Version:	A.BB
Editor:	Name Surname (Organisation)		

Participants List

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CRD	
GSIS	
EEF	
MESH	
DEE	
GKW	

Contributors

Name	Organisation

TOPICS DISCUSSED

DAY 1

Title of Session (responsible organisation and presenter)

Issues discussed:

- ...

Conclusions:

- ...

DAY 2

Title of Session (responsible organisation and presenter)

Issues discussed:

- ...

Conclusions:

- ...

Action Points				
ID	DESCRIPTION	PARTNER IN CHARGE	DATE	DEADLINE
WPno_A/A				

Open Issues				
ID	DESCRIPTION	PARTNER IN CHARGE	DATE	DEADLINE
WPno_A/A				

Appendix F. Presentation template





Thank you!



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