



**ProLight**

# Project Management

Quality Assessment Plan

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D1.2

Authors: Giulia Chersoni (Eurac), Adriano Bisello (Eurac), Momir Tabakovic (FHTW), Michael Heidenreich (FHTW), Sabine Alexandre (ESCI)



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## Meeting Information

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<b>Contributors</b>	Momir Tabakovic (FHTW), Michael Heidenreich (FHTW), Sabine Alexandre (ESCI)
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<sup>1</sup> PU = Public

PP = Restricted to other programme participants (including the Commission Services)

RE = Restricted to a group specified by the consortium (including the Commission Services)

CO = Confidential, only for members of the consortium (including the Commission Services)



## Document history

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## Summary

The present document describes all the mechanisms and operations that will ensure effective and aligned collaboration among the ProLight partners with the ultimate goal to achieve robust implementation of the action as well as obtain high-quality reporting results.

Most of the mechanisms and operations that are described in the ProLight Project Management Quality Assessment Plan have been derived from the Grant Agreement and its Annexes, populated with procedures that have been designed within the WP1 Project Management team.

The ProLight Project Management Quality Assessment Plan contains an overview of the project, followed by the definition of the project management structure, the project communication tools, the management and quality control of the deliverables, the plan for project meetings and the project reporting requirements.

## Disclaimer

This publication reflects only the author's view. The Agency and the European Commission are not responsible for any use that may be made of the information it contains.



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## 1. Introduction

The ProLight Project Management Quality Assessment Plan has been prepared with the purpose to collect in a single document all the mechanisms and operations that will ensure effective and aligned collaboration among the ProLight partners with the ultimate goal to achieve robust implementation of the action as well as obtain high-quality results.

Most of the mechanisms and operations that are described in the Project Management Quality Assessment Plan have been derived from the Grant Agreement and its Annexes, populated with procedures that have been designed within the WP1 Project Management team.

The ProLight Project Management Quality Assessment Plan has been structured as described below.

Firstly, a **Project Overview** is outlined in order to set out the project objective and the defined work-plan and time-plan that the project Consortium intend to follow in order to materialize the project objectives.

Thereafter the **Project management structure** is presented as it is agreed among the WP1 team. In this section the project bodies that have been established for effective project management and quality supervision as well as their roles and responsibilities are described.

Following, the **Communication section** outlines the actions taken by the ProLight coordinator for the facilitation of the communication within the consortium will be reported.

In the **Management of Deliverables** section are described the standards that the deliverables should conform to as well as the review procedures to be followed in order to ensure the quality of the documents produced and submitted to the EC.

The **ProLight Meetings** section describes the types of meetings that are projected to be held as well as the meeting procedures.

Finally, the **periodic and final reports** that must be submitted to the EC as well as their expected content and partner responsibilities are described in the Activity Reporting section.

## 2. Project Overview

### 2.1. Project Objective

ProLight aims to develop an open-innovation ecosystem, integrating concurrent research and innovation processes within a public-private partnership to establish Lighthouse & pocket districts by the provision of the renovation of advanced housing in EU cities, assembling and closely integrating all actors' needs. The applied multi-actor approach uses a methodological concept that explicitly takes into account that energy is part of natural resources within all involved Lighthouse and pocket districts, so that in the end, the envisaged solutions will lead to more energy efficiency and better quality of life for all targeted end-users. The project will also develop new networking structures for cooperation across district/city borders in order to continuously implement sub-projects well integrated and coordinated under the leadership of the ProLight team.



By the selection of various buildings that can represent multiple common archetypes can be ensured the access of the project to all energy users, suppliers, and other relevant stakeholders necessary for a successful deployment, but as well as use of the findings to an international ground and to other European markets.

Aligned with the 5 project objectives is the following text:

Objective 1: **Analysing the state of art and the related needs and priorities** to shape a set of Lighthouse and pocket districts with already conducted sites that will be extended towards a broader approach in regard to climate change and energy behaviour.

Objective 2: **Key stakeholders of ProLight are grouped into several categories** such as local social actors, civil servants, ESCOs and building/energy planners and performers. This group consists of consulting/assisting companies (commercial or non-profit) that offer their well-established expertise in the field providing consulting services with respect to energy conservation/efficiency, supply & demand cooperation, retrofitting, risk management and financial incentives (e.g., Public Partner Partnerships).

Objective 3: **Better understand used business models** and its weaknesses of the Lighthouse & pocket districts on the local markets via performing related appraisals, the main economic, technical and legal constraints observed by taking into account socio-economic qualitative and quantitative aspects per site.

Objective 4: **The already established project library with good practice building and energy products and services** will be extended and allow to reduce investment costs via iterative LCA simulation measures and corresponding changes in the design of the investigated Lighthouse & pocket districts.

Objective 5: **A full-fledged replication campaign** is designed and rolled out within the project, but also in cooperation with other European projects connected to some of the partners, but also abroad by paying tribute to the importance of increasing the project impact.

## 2.2. Project Case Studies

The ProLight project is demonstrated in 2 so-called innovation clusters describing 6 refurbished demo sites and energy communities in 6 member states allowing for a smart neighbourhood approach and providing blueprints for replication.

- **Innovation cluster 1: Building and renovating in an energy and resource efficient way**

**Vienna, Austria:** The district in Vienna is already partly renovated and extended by new attic floors with a heating centre in one of the building objects that supplies renewable thermal energy to other buildings. The project aims to extend to other house or apartment owners the benefits of the joint approach.

**City of Vaasa, Finland:** The ProLight VOAS Pilot will replace a whole block of student residences, altogether 90 studios & 71 family apartments, with a completely new environmental benign housing concept.



**Kozani, Greece:** The pilot project is planned to design and implement energy efficiency solutions and smart net metering for residential buildings that have been donated by the Greek State to population with lower income in the City of Kozani.

- **Innovation cluster 2: Energy communities**

**Gernika-Lumo, Basque Country, Spain:** Gernika TEK is the new energy community located in Gernika-Lumo that will use as good practice case the local energy community in San Fidel School, which represents the creation of the first solar energy community in the area of Busturialdea and Lea Artibai.

**Rovereto, Italy:** For this project Planet Idea will focus on providing innovative services to residents in the district involving two Social Housing complexes, including a total of about 150 apartments.

**Bairro do Chouso, Portugal:** The Chouso Social Housing district includes a total of 5 blocks accounting for a total of 60 dwellings. The project takes the form of a Renewable Energy Community (REC), including demand response solutions, electric energy storage as well as electric mobility integration.

## 2.3. Project Consortium

The project consortium is composed by organizations with multiple expertise, each qualified to cover the specific aspects of the project. The project partners are summarized in Table 1.

Table 1 List of ProLight Partners

No	Name	Short name	Country
1	University of AS Technikum Wien	FHTW	Austria
2	Adeporto - Agência de energia do Porto	ADEP	Portugal
3	Cluster of Bio economy & Environment of Western Macedonia	CluBE	Greece
4	EDP NEW R&D – Centre for New Energy Technologies SA	EDP	Portugal
5	Materialia	MAT	France
6	Gernika-Lumo Kultur Etxea Fundazioa	GLK	Spain
7	4ward Energy Research	4ER	Austria
8	PLANET IDEA SRL	PIS	Italy





9	Asociación de Industrias de Conocimiento y Tecnologías Aplicadas	GAIA	Spain
10	Becquerel Institute	BI	Belgium
11	TechForce	TF	Netherlands
12	University of Vaasa	UNIVAASA	Finland
13	Accademia Europea per la Ricerca Applicata Ed II Perfezionamento Professionale Bolzano	EURAC	Italy
14	Municipality of Kozani	MOK	Greece
15	Vaasan opiskelijaasuntosäätiö	VOAS	Finland
16	European Science Communication Institute	ESCI	Germany

## 2.4. Project Work Packages

The work plan of ProLight consists of 7 work packages linked as shown in Figure 1.

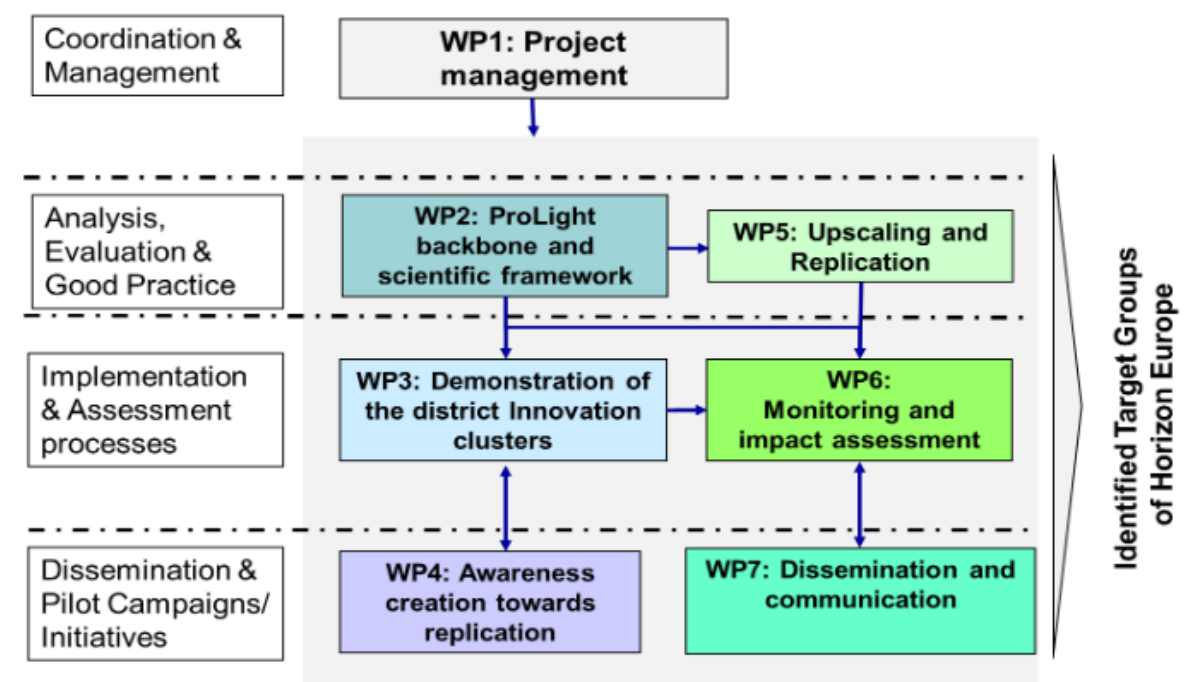


Figure 1 ProLight work plan

The details of each work package are summarized in Table 2.

Table 2 List of ProLight Work Packages



WP No	WP Title	Leader	Participants	Person-month	Start	End
1	Project Management	FHTW	ADEP, CluBE, EDP, MAT, GLK, 4ER, PIS, GAIA, BI, TF, UNIVAASA, EURAC, MOK, VOAS, ESCI	43.25	M1	M48
2	ProLight backbone and scientific framework	CluBE	FHTW, ADEP, EDP, MAT, GLK, 4ER, PIS, GAIA, BI, TF, UNIVAASA, EURAC, MOK, VOAS, ESCI	66.5	M1	M28
3	Demonstration of the district Innovation clusters	TF	FHTW, ADEP, CluBE, EDP, MAT, GLK, 4ER, PIS, GAIA, BI, UNIVAASA, EURAC, MOK, VOAS	57	M1	M38
4	Awareness creation towards replication	GAIA	FHTW, ADEP, CluBE, EDP, MAT, GLK, 4ER, PIS, BI, UNIVAASA, EURAC, MOK, VOAS, ESCI	49.25	M1	M42
5	Upscaling and Replication	BI	FHTW, ADEP, CluBE, EDP, MAT, GLK, 4ER, GAIA, TF, UNIVAASA, EURAC, MOK, VOAS, ESCI	63	M1	M42
6	Monitoring and impact assessment	EURAC	FHTW, ADEP, CluBE, EDP, MAT, GLK, 4ER, PIS, GAIA, BI, UNIVAASA, MOK, VOAS	58.75	M1	M48
7	Dissemination and communication	ESCI	FHTW, ADEP, CluBE, EDP, MAT, GLK, 4ER, PIS, GAIA, BI, TF, UNIVAASA, EURAC, MOK, VOAS	33.5	M1	M48

## 2.5. Project Time-plan

The project activities have been planned to be executed in 48 months, starting on 1 October 2022. The duration of each work package and task within the project timespan is presented in the project's Gantt chart (Figure 2).



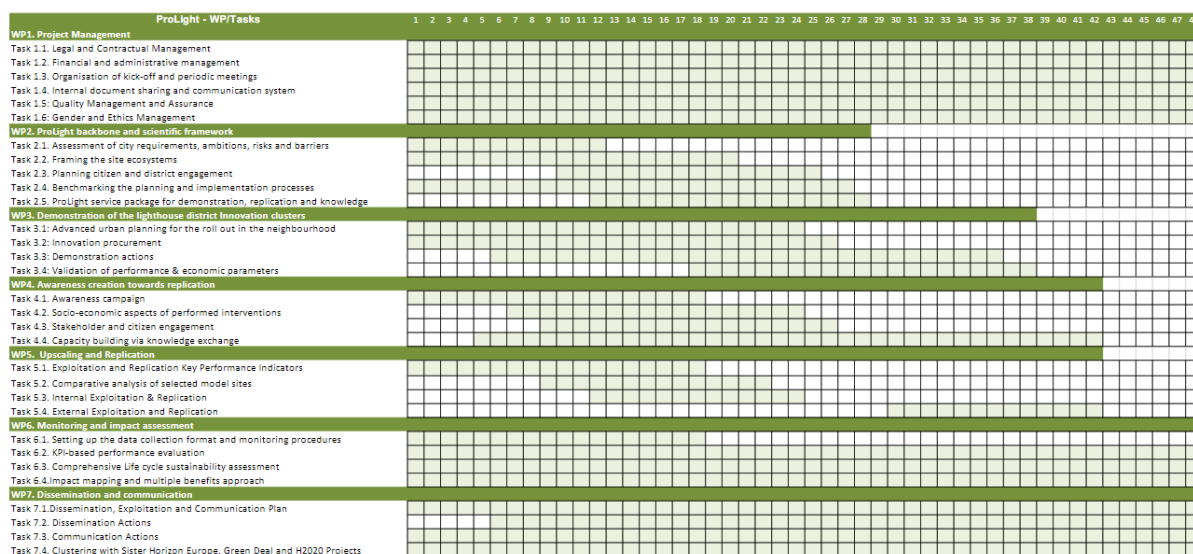


Figure 2 ProLight gantt chart

The Milestones to be achieved within the project duration for the successful competition of the work plan are summarized in Table 3.

Table 3 List of ProLight Milestone

MS No	MS Title	WP No	Due date	Means of verification
M1.1	Tools for management of the project implemented	1	M12	Based on D1.1 and D1.2 all necessary management tools are operating
M1.2	Elaborating & collating interim activity/ periodic reports	1	M43	Corresponding reports are internally released and by the EC agreed
M2.1	City assessment and planning for the roll out ready	2	M12	Using the feedback given in deliverable D2.1, the results are integrated in the period reporting
M2.2	Knowledge transfer and group consultations established	2	M28	Consultations and webinars are implemented on ProLight website
M3.1	Implementation realised	3	M36	Agreed reports on performed measures conducted
M3.2	Validation and optimisation completed	3	M38	Validation of performance discussed & Quality assurance given.
M4.1	Socio-economic survey is conducted	4	M24	Socio-economic analysis report is reviewed & agreed



M4.2	Stakeholder engagement covered	4	M42	All deliverables of WP4 completed and the specific objectives achieved and published
M5.1	Interrelations between KPIs and business models are fixed	5	M21	Process design study and market appraisals conducted
M5.2	Exploiting main project results	5	M42	All deliverables of WP5 completed and the specific objectives achieved and published
M6.1	End of Data collection requirements definition and warehouse preparation	6	M12	Common WP6 data collection format defined and agreed.
M6.2	Baseline for Evaluation and impact assessment established	6	M18	Assessment results of expected energy savings are discussed & agreed.
M6.3	Monitoring and evaluation strategy beyond ProLight released	6	M40	Cross-comparison of monitoring results & deriving of recommendations beyond the project end.
M6.4	Performances, Multiple impacts and sustainability fully analysed	6	M48	All deliverables of WP6 completed and the specific objectives achieved and published
M7.1	Website Launch	7	M04	ProLight Website online

### 3. Project Management Structure

The overall management structure of the project is planned and designed to guarantee that the stated objectives and achievements will be fulfilled, giving special attention to the overall coordination, risk management and contingency planning measures.

#### 3.1. Prolight Governance

The management structure has been structured in two main boards:

- The **General Assembly**, composed of one representative of each partner of the consortium, which is chaired by the Project Coordinator and will be organized on a half-yearly basis.
- The **Executive Board**, composed of WP leaders and demo district coordinators, which is chaired by the Project Coordinator and will be organized in on-line meetings on a monthly basis.

#### 3.2. Body Supporting Governance

In addition, local **End-Users Advisory and Interest Group (EAIG)** meetings will take place at local level of the demo districts. The local End-Users Advisory & Interest Groups are established at each demo



district to test new skills acquisition in construction sector by piloting new technologies and processes in the renovation at district level focussing on needs of considering social aspects. It is intended to maximise the probability of replication of the district-scale solutions developed in ProLight to trigger an EU-wide market deployment.

## 4. External Communication

The ProLight Logo (Figure 3) will be included in all project material such as deliverables, reports, presentations, newsletters etc. The project logo is available on the teams platform in the subfolder.

### 4.1. Use of project logo



Figure 3 ProLight logo

### 4.2. Use of templates

In order to ensure consistent and uniform presentation of ProLight, a series of templates have been developed by ESCI.

The templates will be used by the ProLight partners when presenting or reporting about ProLight. The main templates are:

- ProLight Deliverable template
- ProLight Presentation template
- ProLight Meeting Minutes

The templates are available on the teams platform in the subfolder 8\_Templates.



## 4.3. HEU rules for dissemination

### 4.3.1. Acknowledging EU funding

All partners should indicate at all times that the project received funding from the European Union by including the following statement together with a high-resolution EU flag, which should be given appropriate prominence when displayed with the project logo or any other logos.

Any form of communication including dissemination through scientific publications must include the following acknowledgement (eventually translated in the language of the communication):



“The research leading to these results/this publications has been co-funded by the European Union under grant agreement No 101079902”

Co-funded by the European Union
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The EU emblem can be downloaded from:  
[https://ec.europa.eu/regional\\_policy/en/information/logos/](https://ec.europa.eu/regional_policy/en/information/logos/)

### 4.3.2. Disclaimer excluding Agency responsibility

Any dissemination of results must indicate that it reflects only the author's view and that the Agency and the European Commission is not responsible for any use that may be made of the information it contains by including the following disclaimer:

**“This paper/ presentation/ article/ publication / website reflects only the author’s view and the European Commission is not responsible for any use that may be made of the information it contains.”**

## 5. Internal Communication

The power of Microsoft Teams has been exploited in order to facilitate the communication and information exchange and collaborative work among the ProLight partners. A ProLight Teams Platform has been set up by FHTW. The ProLight Teams will be the main communication and documentation exchange channel for the ProLight partners. All partners have access to ProLight Teams.

A Team folder has been created for each Work Package, subdivided in sub-teams for each Task. Each sub-team which is composed of:

- Communication section (Posts): This section will host Task related discussions and will substitute the exchange of e-mails.
- Files section: This is a shared files section where all Task related documentation (reports, excel worksheets, literature etc.) will be uploaded.



- Action List: In this section action points are listed along with person responsible for each action.

## 6. Management and Deliverables

The Deliverables are the means of communication to the EC and the public (in case of public deliverables) the work that has been performed within the framework of the funded action. Therefore, the Deliverables should be high quality documents that clearly convey the project progress and its outcomes.

Quality management of the ProLight Deliverables is an important task within the project management and quality control. In the following sections are described the standards that the deliverables should conform to as well as the review procedures to be followed in order to ensure that quality documents have been produced and will be submitted to the EC.

### 6.1. Deliverable Template

The Deliverable Templates are available on the ProLight teams platform in the subfolder 8\_Templates. All partners are requested to use these templates; including all elements they feature (cover page, layout, logos, format, tables, etc.).

### 6.2. Deliverable Identification

In order to ensure effective version control, the documents follow a file naming convention for their filename. This will be their identification.

- For the **working versions**, the filename of the deliverable is:

PROLIGHT\_DX.X\_YYMMDD\_version x\_partner.doc

- For the **final version** to be submitted, the filename of the deliverable is:

PROLIGHT\_DX.X\_Deliverable name.pdf

- For **deliverables** that have **intermediate submissions** before their final version, the following naming convention will be used for each intermediate submission before the final:

PROLIGHT\_DX.X\_Deliverable name\_Mx.pdf

- For the **final submission** after the intermediate, the following naming convention will be used:

PROLIGHT\_DX.X\_Deliverable name\_Final.pdf



## 6.3. Deliverable Review Process

All the deliverables prepared must undergo an official review before being submitted to the EC. The review process is organized in two phases:

- **Internal Review**

The deliverable is reviewed by two ProLight partners. FHTW and EURAC are leading the ProLight Quality Management and Assurance (Task 1.5) and have assigned the internal reviewers to the deliverables (see Table 5).

The partner responsible for the deliverable informs the internal reviewers that the deliverable is ready for reviewing, in a timely manner (2 weeks before the deadline).

The internal reviewers perform the review of the deliverable within the expected deadline (1 week from the notification of the responsible partner).

The partner responsible for the deliverable updates the deliverable accordingly and informs the project coordinator.

- **Coordinator's review**

The updated deliverable will be sent to the project coordinator no later than 2 days before the submission deadline.

The coordinator performs the final quality check, approves and submits the deliverable within the expected deadline.

### 6.3.1. Review of Deliverables

Below are presented the ProLight deliverables in chronological order. Internal reviewers have been assigned for the deliverables due for the entire duration of the project.

Table 4 Deliverable Review Plan

No	Name	WP	Lead	Type	DL	Submission to reviewers	Reviewers	Internal review due	Submission to coordinator	Due date
1.1	Kick-Off meeting, EAIG mapping and minutes	WP1	FHTW	R	CO		ADEP, TF			M2
1.2	Project Management, Quality Assessment Plan	WP1	EURAC	R	CO		FHTW, ESCI			M3
1.3	Periodic Management Reports	WP1	FHTW	R	CO		GAIA, EURAC			M6, 12, 18,





										24, 30, 36, 42
1.4	Final Report	WP1	FHTW	R	PU		EDP, EURAC			M48
1.5	Gender Equality Plan	WP1	GAIA	R	PU		FT, ESCI			M6, 24, 48
1.6	Data Management Plan	WP1	FHTW	R	PU		EDP, TF			M6 - M24 - M48
2.1	Refined factsheets of ProLight districts	WP2	UNIVA ASA	R	PU		4ER, BI			M12
2.2	Master plan incl. the demo design frameworks	WP2	EDP	R	PU		FHTW, UNIVAASA			M20
2.3	Local strategies towards active social actors and stakeholders	WP2	CluBE	R	PU		GAIA, ESCI			M25
2.4	Benchmarking report	WP2	FHTW	R	PU		MAT, PIS			M27
2.5	Service package and Smart Knowledge Hub	WP2	MAT	R	PU		EDP, PIS			M28
3.1	Advanced roll-out strategy	WP3	TF	R	PU		4ER, EURAC			M24
3.2	Pro-innovation procurement plan	WP3	EDP	R	CO		PIS, BI			M26
3.3	Three annual implementation reports	WP3	EDP	R	PU		FHTW, EURAC			M13 , 25, 37
3.4	Report on quality assurance of the demo sites	WP3	FHTW	R	PU		EDP, MAT			M38
4.1	Stakeholders mapping and Activator Plan	WP4	GAIA	R	PU		CluBE, MAT			M13
4.2	Survey analysis report	WP4	FHTW	R	PU		UNIVAASA, EURAC			M24
4.3	Stakeholder engagement for	WP4	CluBE	R	PU		ADEP, GAIA			M26



	replication requirements								
4.4	Capacity Building workshops back-to-back to project meetings	WP4	CluBE	R	PU		FHTW, PIS		M6, 12, 18, 24, 30, 36, 42
5.1	Comparative analysis report connecting KPIs and business models	WP5	BI	R	PU		4ER, ESCI		M22
5.2	Internal and public exploitation workshops or webinars	WP5	4ER	R	PU		CluBE, BI		M24, 42
6.1	Report on Monitoring and Evaluation	WP6	EURAC	R	PU		FHTW, ADEP		M24 ?
6.2	Report on LCSA	WP6	EURAC	R	PU		MAT, BI		M30
6.3	Report on Multiple Benefits	WP6	EURAC	R	PU		FHTW, UNIVAASA		M48
7.1	ProLight Website	WP7	ESCI	R	PU		FHTW, CluBE		M04
7.2	Dissemination, Exploitation and Communication Master Plan	WP7	ESCI	R	PU		CluBE, TF		M6, M31
7.3	Best Practices of Communication and Dissemination Actions	WP7	ESCI	R	PU		4ER, GAIA		M30, M48
7.4	Replication Guidebook	WP7	EURAC	R	PU		ADEP, ESCI		M46

## 7. ProLight Meetings

This section describes the procedures that will be followed for the ProLight meetings. The ProLight meetings can be physical or held via web, according to allowing circumstances.



## 7.1. Type of Meetings

The project is initiated with the project **kick-off meeting** organized by FHTW, together with the 1st General Assembly (GA) meeting, to present the consortium structure, officially nominate the WP leaders, field visit to good practice and to nominate representatives for the local End-Users Advisory and Interest Group (EAIG) that will be updated on an annual basis.

**Periodic hybrid meetings** (GA & EAIG) will be held twice per year, the on-line or in-person attendance depends on the pandemic situation and the travel circumstances. In order to reduce the project's related carbon footprint, it is highly recommended to avoid flying. If a flight is shorter than 3 hours alternative travel methods should be considered. All project partners will meet to assess progress of on-going tasks, review next steps, and adjust the work plan accordingly if necessary. The project coordinator, assisted by the local partners, will arrange the details of the project meetings in a timely manner.

**Review Meetings** with EC representatives will be held in accordance with the Grant Agreement, to allow proper monitoring of the project progress: preferably, one in each of the demonstration sites with others in Brussels. The Review Meetings will take place after the submission of the corresponding Periodic Report within 48 days (as per HE rules), that is, at the beginning of the third month after the end of each period.

**Executive Board Meeting** with WP leaders will be held monthly online to ensure effective coordination among partners responsible for WPs.

**Coordination Meeting:** WP leaders should find the appropriate way to manage their WPs (with a good balance between frequency of meetings and effectiveness of monitoring) and ensure coordination with Task leaders and contributing partners. Demo leaders are requested do the same for the local cluster and interact with the EAIG.

## 7.2. Procedures

The meetings will be convened by the Coordinator that shall give notice of a meeting and prepare and send the primary agenda to all members as soon as possible.

WP level meetings will be convened by the respective WP leader, who will be responsible for setting the meeting agenda and keeping the meeting minutes.

## 7.3. Meeting Minutes

The template for the meeting minutes is available on Teams in the subfolder 8\_Templates. The physical meeting minutes should include a list of participants for every day of the meeting with the signatures of all those present at the meeting. The list of participants and the signatures are the responsibility of the organiser of the face – to – face meeting. A copy of the list of participants should be sent to the Coordinator after the meeting.

All the PPT presentations and documents presented or prepared during the meeting constitute an integral part of the same minutes.



The meeting minutes should also include a list of Meeting Action Points listing the: a) action; b) concerned WPs; c) partner/person in charge and d) deadlines.

Informal minutes are mandatory also for bilateral web meetings.

## 8. Reporting

### 8.1. Continuous Reporting

The beneficiaries will continuously report on the progress of the action (e.g. deliverables, milestones, outputs/outcomes, critical risks, indicators, etc; if any), in the Portal Continuous Reporting tool and in accordance with the timing and conditions it sets out (as agreed with the granting authority).

Standardised deliverables (e.g. progress reports not linked to payments, reports on cumulative expenditure, special reports, etc; if any) will be submitted using the templates published on the Portal.

### 8.2. Periodic Reporting

Periodic reporting will provide reports that include payment requests, in accordance with the schedule and justification modalities set out in the GA

- for additional pre-financings (if any): an additional prefinancing report
- for interim payments (if any) and the final payment: a related periodic report.

The periodic reports include a technical and financial part.

Periodic reporting shall be submitted within 60 calendar days after the end of the respective reporting period.

According to the Grant Agreement the ProLight action is divided in the following reporting periods:

- **RP1:** from month 1 to month 18
- **RP2:** from month 19 to month 36
- **RP3:** from month 37 to month 48

#### 8.2.1. Technical Reports

In every technical progress report, each Work Package Leader will be required to:

- Summarize the progress towards the objectives for each Task of the WP
- Report the progress towards deliverables and milestones
- Report any dissemination activities, to be summarized in WP7
- Explain the reasons for deviations from Annex I and their impact on other tasks as well as on available resources and planning (if applicable)
- Explain the reasons for failing to achieve critical objectives and explain the impact on other tasks as well as on available resources and planning (if applicable)



- Provide a statement on the use of resources, in particular highlighting and explaining deviations between actual and planned person-months per work package and per beneficiary in Annex I
- Report on risks and propose corrective/mitigation actions (if applicable)
- Report any other information requested by the coordinators

Each technical report will also contain:

- A summary for publication by the Agency, prepared by the Coordinator
- The answers to the 'questionnaire', covering issues related to the action implementation and the economic and societal impact, notably in the context of the Horizon Europe key performance indicators and the Horizon Europe monitoring requirements

### 8.2.2. Financial Progress Reports

The financial part of the additional prefinancing report includes a statement on the use of the previous prefinancing payment.

The financial part of the periodic report includes:

- the financial statements (individual and consolidated; for all beneficiaries/affiliated entities)
- the explanation on the use of resources (or detailed cost reporting table, if required)
- the certificates on the financial statements (CFS) (if required; see Article 24.2 and Data Sheet, Point 4.3).

The financial statements must detail the eligible costs and contributions for each budget category and, for the final payment, also the revenues for the action (see Articles 6 and 22 of the GA).

All eligible costs and contributions incurred will be declared, even if they exceed the amounts indicated in the estimated budget (see Annex 2 of the GA). Amounts that are not declared in the individual financial statements will not be taken into account by the granting authority.

By signing the financial statements (directly in the Portal Periodic Reporting tool), the beneficiaries confirm that:

- the information provided is complete, reliable and true
- the costs and contributions declared are eligible (see Article 6 of the GA)
- the costs and contributions can be substantiated by adequate records and supporting documents (see Article 20) that will be produced upon request (see Article 19 of the GA) or in the context of checks, reviews, audits and investigations (see Article 25 of the GA)
- for the final periodic report: all the revenues have been declared (if required; see Article 22 of the GA).

Beneficiaries will have to submit also the financial statements of their affiliated entities (if any). In case of recoveries (see Article 22 of the GA), beneficiaries will be held responsible also for the financial statements of their affiliated entities.



### 8.3. Final Reporting

A final report that includes a technical and financial report will be submitted by the coordinator in addition to the periodic report for the last reporting period.

The final technical report will include a summary for publication containing:

- an overview of the results and their exploitation and dissemination;
- the conclusions on the actions, and
- the socio-economic impact of the actions.

The final financial report will also contain:

- a 'final summary financial statement', created automatically by the electronic exchange system, consolidating the individual financial statements for all reporting periods and including the request for payment of the balance and
- a 'certificate on the financial statements' (drawn up in accordance with Annex 5 of the GA) for each beneficiary and for each linked third party, if it requests a total contribution of EUR 430,000 or more, as reimbursement of actual costs and unit costs calculated on the basis of its usual cost accounting practices (see Article 5.2 and Article 6.2 of the GA).

