



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 646482

FLEXICIENCY  
Deliverable D1.1  
Quality Management Plan  
v1.0

# **FLEXICIENCY**

energy services demonstrations of demand response, FLEXibility and energy efficiency based on metering data

EC GA n° 646482

## **Deliverable D1.1**

Quality Management Plan

v1.0



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## D1.1 – Quality Management Plan

### Document Information

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## Revision History

Version	Date	Author/Reviewer	Notes
0.1	24/02/2015	Laura Marretta	First draft ready for Review
0.2	03/03/2015	Joana Abreu Jackson	Review of first draft
0.3	13/03/2015	Laura Marretta	Second draft integrating the comments received from reviewers



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## Executive Summary

In this report the approach to project monitoring and supervision, project reporting and the review process is presented. In particular, deliverable D1.1 summarises the key provisions in the Consortium and Grant Agreements, the procedures for periodic reporting, explanation of the consortium organisational structure and decision making procedures, roles and responsibilities and documents review process.

The aim of these activities is to ensure high quality deliverables and management of the project and to have a clear periodic process for reporting on activities, effort expenditure, as well as having a clear review procedure with defined phases.

The document is structured in four main chapters and will be updated as needed in the course of the project: Management Structure; Reporting (task/deliverable progress & efforts/costs); Review procedure for deliverables production and Risk Assessment.

- **Management Structure:** this section details the decision making procedure and the organisation of the consortium bodies in the project;
- **Reporting:** this section presents the approach and tools to support project monitoring, in terms of resources, project schedule and overall progress. The aim of this section is to provide guidelines for the periodical reporting activities to be applied by all partners for providing data to the Project Coordinator (PC), for management and financial reports preparation.
- **Review Procedure:** this section details the procedure required for review and formal approval of deliverables.
- **Risk Assessment:** this section details the project procedure for risk assessment, monitoring and mitigation for a smooth implementation of the project with respect to its objectives.

The schedule of the project activities required for the periodic reporting to the European Commission is in particular presented, specifying the contributions expected by all the partners in the FLEXICIENCY consortium.

Moreover, the Quality Management Plan will be complemented by the definition of Key Performance Indicators in the scope of WP3 'KPIs definition and assessment of the demonstrations' and will be in particular described in the deliverable D3.1. They will be used as an instrument for the evaluation of the project performances and their potential impact, at technical, economic and environmental level. A common methodology for KPI calculation and measurements will be defined in the project to address comparability. Measurement will be carried out in each demo (WP5-9) and in WP10.



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# 1. Introduction

## 1.1 Scope of the document

In this report the approach to project monitoring, supervision, reporting and review are presented. Procedures are provided for periodic reporting on activities and effort expenditure, to be applied by all partners for the provision of data to the Project Coordinator (PC) and for management and financial reports preparation. Instruments are developed with the aim to monitor the degree of completion of activities and expected deliverables. A review process with an approval procedure is defined with the aim to control the quality of the documents while they are being generated and to ensure that project intermediate objectives are met.

Key Performance Indicators for the evaluation of the project performances and their potential impact will be defined in the scope of WP3 'KPIs definition and assessment of the demonstrations' and will complement this report. They will be in particular described in the deliverable D3.1.

The key provisions in the Consortium and Grant Agreements, together with an explanation of the consortium organisational structure and decision making procedures, roles and responsibilities, are also provided.

## 1.2 Notations, abbreviations and acronyms

AB	Advisory Board
DoA	Description of the Action
DR	Document Responsible <sup>(1)</sup>
EB	Executive Board
EC	European Commission
GA	General assembly
EC GA	Grant Agreement
IFS	Individual Financial Statement
IR	Internal reporting
PC	Project Coordinator
RP	Reporting Period
RW	Document Reviewer
TL	Task Leader
WP	Work Package
WPL	Work Package Leader

Table 1: Acronyms list

<sup>(1)</sup> DR is the single person responsible of the deliverable, and can be the same person as the TL and WPL

## 2. Management structure

The management structure of the project is designed to enable efficient information and communication flows within the consortium and with external stakeholders as well as decision making mechanisms. The organisational structure is based in particular on hierarchical management layers, whereas the coordination and management activities of the Project will be





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performed by the Project Coordinator (PC) – which is the legal entity acting as the intermediary between the Parties and the Funding Authority - in cooperation with the following Consortium Bodies:

- **General Assembly (GA)**, as the ultimate decision-making body of the Consortium with power mainly over non-operational, strategic and long-term issues (GA meetings planned once a year). It consists of one Representative of each Party. The Project Coordinator chairs all meetings of the GA, unless decided otherwise in a meeting of the GA.
- **Executive Board (EB)**, as the supervisory body for the execution of the Project for its whole duration, which shall report to and be accountable to the General Assembly and be responsible for the implementation and risk management of the Project rather than strategic aspects (EB meetings planned every quarter - calls/video conferences shall be deemed as meetings). It consists of the Project Coordinator, which chairs all the meetings of the EB, and Work Package Leaders.

The work is organised into **Work Packages (WPs)**, led by Work Packages Leaders (WPLs), which are legal entities that coordinate, plan, monitor and report to the PC about WP progress (at least every three months), including on budget issues. The WPLs also inform, in coordination with the PC, the EB on the progress achieved, results obtained, problems encountered and possible risks, before every EB and GA meeting.

Additionally, an **Advisory Board (AB)**, which is an (external) consultative organ without voting rights, will be set up and gathered once a year to address the critical recruitment phase of end users for the future exploitation of the project results. The AB encompasses representatives of the project stakeholders, such as members of different consumer associations, DSOs, retailers, regulators and related associations. A list of AB members will be defined and updated during the project under activities of WP11 (Dissemination and Exploitation).

Figure 1 displays the organisational structure for the project, the interdependencies between consortium bodies and between them and the external stakeholders.



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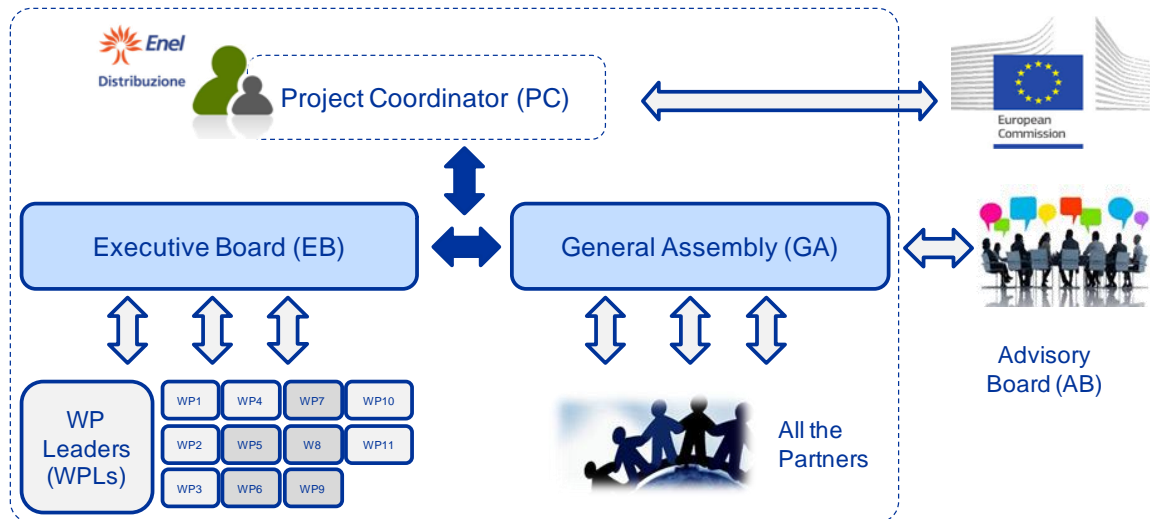


Figure 1: Organisational structure for the Project

**Each Consortium Body shall not deliberate and decide validly unless two-thirds (2/3) of its Members are present** or represented (quorum), with the exception of the General Assembly, where specific criteria are described below.

In the General Assembly and the Executive Board, the voting rights are attributed to the Members according to the following rules:

- **General Assembly (GA):** the voting right of each Member is **proportional to its budget** (each Member has a voting right weighted by the ratio between its budget and the total budget for the Project). In particular, each General Assembly shall not deliberate and decide validly unless two-thirds (2/3) of the weighted votes, attributed to its Members, are present or represented (quorum). Decisions will be taken by a **majority of two-thirds (2/3) of the weighted votes** attributed to the present or represented Members.
- **Executive Board (EB):** each Executive Board member has **one vote right**. Decisions will be taken by a majority of **two-thirds (2/3) of the votes** of the Members present or represented at a meeting.

A Member (if showing that its work, time, costs, liabilities, Intellectual Property Rights (IPR) or other legitimate interests would be severely affected) may exercise a veto. The concerned Consortium Body shall make every effort to resolve the matter in the next meeting, bringing the issue to the GA as ultimate decision body, where necessary.

Further details on the management structure can be found in the DoA – Annex 1 of the Grant Agreement - and in particular in the FLEXICIENCY Consortium Agreement signed by each Partner in the Consortium.



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## 3. Reporting

### 3.1 Reporting towards EC

FLEXICIENCY is divided into three following 'reporting periods' (RP) (as specified in the Grant Agreement). Accordingly, the project will deliver three periodic reports:

1. **1<sup>st</sup> periodic report** on the progress of work and use of resources D1.2 – issued by M20 and related to RP1 (**from M1 to M18**)
2. **2<sup>nd</sup> periodic report** on the progress of work and use of resources D1.3 – issued by M38 and related to RP2 (**from M19 to M36**)
3. **Final periodic report** on the progress of work and use of resources D1.4 – issued by M50 and related to RP3 (**from M37 to M48**)

These periodic reports include the production of a **technical and financial report**, including the requests for payment (as specified in the Grant Agreement) and in particular:

- o a '**periodic technical report**' containing an:
  - Overview of the progress of work (together with a publishable summary) with respect to the DoA, including dissemination and exploitation of the results. With this regard, periodic update of the Exploitation plan (D11.3) are planned as needed during the project as long as results are produced [tentatively at M12, M24, M36, M48].
  - Explanation of the work carried out
  - Answers to a 'questionnaire' covering issues related to the action implementation and the economic and societal impact in the context of Horizon 2020

The report is official and must be of adequate technical quality as it will be the main description of project progress to the EC. Elaboration is led by the PC with the active contribution of the WPLs and collaboration from all the partners in general.

- o a '**periodic financial report**' containing for each RP concerned an:
  - 'Individual financial statement' – IFS (according to Annex IV of the EC GA)
  - Explanation of the use of resources from each beneficiary (and their linked third parties), together with information of the use of subcontracting and in-kind contributions by third parties
  - 'Periodic summary financial statement', created automatically by the electronic exchange system and including the request for interim payment.

Cost statement is under the responsibility of each partner (and linked third party). Periodic financial reports must be **completed by each beneficiary (and by each linked third party)** involved in the action, for each reporting period (RP1, RP2 and RP3 as detailed above). A draft version of the Individual Financial Statements will be submitted to the PC in



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good time (**at least 4 weeks before the delivery date**) for PC to support to the partner and verify the existence of possible errors. The PC will collect IFSs and submit them to the EC together with the technical and financial reports for every RP.

After submission of the IFS to the PC, the PC can request partners to correct any error and reject the IFS (so becoming editable by the partner). This check will only address formal errors and overall consistency with planned budget. In the case of discrepancy with the budget, the PC will warn the partner of possible accounting errors. In case of relevant inconsistency with respect to the activities carried out and the achievements in relation to the progress of the project, the PC will discuss the issue with the partner concerned and for relevant issues, bring it to the attention of the GA.

**The technical and financial reporting process towards the EC needs to start before the end of each reporting period** and is designed to last up to 7 weeks to comply with the production deadline. Intermediate deadlines will be defined to assure a good quality and review of the reports.

**In addition to the periodic reports, a Final report is envisaged in the EC GA**, to be submitted within 60 days following the end of the last reporting period (i.e. on M50 as for the last periodic report). In particular, the Final report will include: a 'final technical report' with a summary for publication containing (i) an overview of the results and their exploitation and dissemination; (ii) the conclusions on the action, and (iii) the socio-economic impact of the action; a 'final financial report' containing (i) a 'final summary financial statement' created automatically by the electronic exchange system, consolidating the individual financial statements for all RP and including the request for payment of the balance.

In particular, only **for the last reporting period, those beneficiaries and linked third parties having requested a cumulative EU funding of Euro 325.000 or more shall produce a Certificate on the Financial Statements (CFS)**, issued by an external auditor and drawn up in accordance with Annex V of the EC GA.<sup>1</sup>

As a general rule, **each beneficiary is responsible also for its linked third parties**, where applicable. In particular, the beneficiary submits the required periodic reports to the PC also for its linked third parties and keeps the originals of the IFSs and the CFS, being the interface with the PC. Although not reporting directly to the PC, the linked third parties must fulfill the general and specific rules for cost eligibility and reporting as if they were beneficiaries. Linked third parties are

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<sup>1</sup> **Useful links for periodic reporting towards EC:**

Annotated Grant Agreement  
[ec.europa.eu/research/participants/.../h2020/grants.../h2020-amga\\_en.pdf](https://ec.europa.eu/research/participants/.../h2020/grants.../h2020-amga_en.pdf)

Horizon 2020 Manual  
[ec.europa.eu/research/participants/docs/h2020-funding-guide/grants/grant-management/keeping-records\\_en.htm](https://ec.europa.eu/research/participants/docs/h2020-funding-guide/grants/grant-management/keeping-records_en.htm)

Frequently asked Questions  
[ec.europa.eu/research/participants/portal/desktop/en/support/faq.html#07](https://ec.europa.eu/research/participants/portal/desktop/en/support/faq.html#07)



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required to prepare and send separate, signed and original IFSs and CFS to the corresponding beneficiary in paper and digital form and to keep a record of the costs and efforts (PMs) as declared. The Beneficiary will keep the original statements.

## 3.2 Internal reporting

For efficient project management purposes, **monitoring of the project work will be performed every quarter** at each Executive Board meeting. Templates provided by the PC will be used and filled in by WPLs (with input from Task Leaders (TLs) and contributors to WP activities) and sent to the PC in good time before each EB meeting (at least ten days before).

With regards to the financial and budget issues, **cost monitoring** - including reports on incurred costs and use of resources (Person Months) per WP - will be carried out on a **six monthly basis** by each beneficiary and send to the PC.

Dedicated templates, prepared by the PC in accordance with the financial reporting, will be used for internal cost monitoring. Details are provided in the following sections.

All the templates will be made available also in the online Content Management System (CMS), under development. The online CMS will be used as a working tool for the sharing of documents related to FLEXICIENCY and will consist of a private area, accessible online to the project partners, within the project website.

Templates and related level of details to be provided can be updated in the course of the project to the extent is needed.

### 3.2.1 Project Monitoring and Control

#### 3.2.1.1 Progress monitoring

The Gantt chart below summarises the planned project activities and their expected start and end dates, with indication of responsible WPLs. As mentioned in section 1.4.2, the project progress will be monitored by the PC through regular WP and Task reporting prior to every Executive Board meeting on quarterly basis by using an appropriate template.

The task reporting template, provided by the PC, will be the formal instruments to communicate specific issues associated to Tasks and WPs to the Executive Board and are to be filled in by WPLs (with all the necessary inputs from TLs) and sent in good time to the PC prior to each EB.

The excel file "*FLEXICIENCY\_Task\_Deliverable\_Reporting.xls*" will summarise at a glance the status of each Task, progress made and planned actions, together with interdependencies with other Tasks/WPs and any relevant criticality and risk emergence. Figure 2 and 3 below displays a screenshot of the provided template.



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Task Reporting Template	
This template will be used by the PC to monitor the status of every task and to highlight criticalities if any. This will be the formal instrument for WP leaders (& Task Leaders) to communicate specific issues associated to tasks to the Executive Board	
Real Start Date	Input the real start date of task
Expected / Real End Date	Input the expected or real (if finalized) end date of task
Progress to date	Brief description of the main accomplishments of task to date
Upcoming Actions for next Reporting Period	Describe the upcoming actions for the next reporting period (i.e. next quarter)
Status	Explain current status of Task (5 options from drop-down list)
	<b>ALERT - Progress of task severely disrupted or stopped. Issue for Executive Board to resolve</b>
	<b>WARNING - Task delayed but progress ongoing with no critical issues to raise to the Executive Board</b>
	<b>OK - Task ongoing and on schedule</b>
	<b>NOT STARTED - Task not started</b>
	<b>TASK FINISHED - Task finalized</b>
	<b>TASK RE-OPENED - Task re-opened due to requirement by EC to reissue deliverable</b>
Criticalities	Please describe specific criticalities in Task that should be highlighted to Executive Board
Risks	Please describe potential relevant risks in task that could halt progress in respective task and to highlight to the EB

**Figure 2: Screenshot of the task reporting template**

Specifically, the column “STATUS” allows highlighting any deviation from the planned objectives and timeline according to the following:

- ✓ **ALERT**: critical issues rose in the task and need to be brought to the attention of the Executive Board for decision/resolution. Relevant obstacle has been encountered in the task that can jeopardise progress in the activity of the task and potentially impact the entire project. It is mandatory to submit the issue to the EB.
- ✓ **WARNING**: some issues within the task are causing delays, with no relevant need to be brought to the attention of the Executive Board for decision/resolution
- ✓ **OK**: No relevant issues in the task. Task is ongoing and on schedule.
- ✓ **NOT STARTED**: Task not started yet according to the DoA.
- ✓ **TASK FINISHED**: Task finalised and all associated official deliverables uploaded in EC ECAS system.
- ✓ **TASK RE-OPENED**: The task has been reopened. This will be the case if after the official review with the European Commission, the EC requests that certain deliverables be re-drafted.

In addition, a power point template, provided by the PC, will be filled in by WPLs (with all the necessary inputs from TLs and other partners) and used at the EB meetings every quarter.



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(\*) if yes, please, fill in Risk spreadsheet

Task No.	Title	Lead	Link	Planned Start Date [M]	Real Start Date	Planned End Date	Expected / Real End Date	Delay (M)	Progress to date	Actions for next RP	Risks (*)	Criticalities/ key notes with respect to other task/WP	STATUS Q1	Q2	Q3
<b>WP1</b>	<b>Project Management and Coordination</b>	<b>ENED</b>		<b>1</b>		<b>48</b>									
T1.1	Administrative assistance to project partners	ENED	-	1	1	48			Insert text	Insert text	NO	Insert text	OK - Task ongoing and on schedule		
T1.2	Interactions with the European Commission	ENED	-	1	1	48			Insert text	Insert text	NO	Insert text	OK - Task ongoing and on		
T1.3	Coordination, organization and communication	ENED	-	1	1	48			Insert text	Insert text	NO	Insert text	OK - Task ongoing and on		
T1.4	Quality Management	ENED	-	1	1	48			Insert text	Insert text	NO	Insert text	OK - Task ongoing and on		
T1.5	Technical and financial progress and final reports	ENED	-	1	1	48			Insert text	Insert text	NO	Insert text	OK - Task ongoing and on		
<b>WP2</b>	<b>Use case, service definitions and system</b>	<b>ERDF</b>		<b>1</b>		<b>12</b>									
T2.1	Definition of the services and related use cases	ENED	-	1		12							OK - Task ongoing and on		
T2.2	Definition of the requirement for services – Definition of the system architecture	ERDF	-	1		12							OK - Task ongoing and on		
T2.3	Data Modelling – Communication Protocols	ERDF	-	1		12							OK - Task ongoing and on		
<b>WP3</b>	<b>KPIs definition and assessment of the</b>			<b>13</b>		<b>48</b>									
T3.1	Definition of project KPIs	ENED	T2.1, T2.2, T2.3	13		19							NOT STARTED - Task not started		
T3.2	Harmonization of data analysis activities performed in the demonstrations	VAASAE TT	T4.1, T4.2, T5.1, T6.2	19		48							NOT STARTED - Task not started		
<b>WP4</b>	<b>Development of the Market Place for</b>	<b>SAP</b>		<b>9</b>											
T4.1	Development of the Market Place following an iterative approach	SAP	T2.1, T2.2, T2.3	9		36							NOT STARTED - Task not started		
T4.2	Seamless integration of the EU Marker Place, with the DSO and Service platform	UL	T2.1, T2.2, T2.3, T5.1, T6.1, T7.2	13		48							NOT STARTED - Task not started		
<b>WP5</b>	<b>Demonstration 1 (Italy)</b>	<b>ENED</b>		<b>7</b>		<b>48</b>									
T5.1	Enhancement of the DSO and service platforms, and development of the interfaces with the Market Place prototype	ENED	T2.1, T2.2, T2.3	7		28							NOT STARTED - Task not started		
T5.2	Full-scale demonstration	ENED	T5.1	18		42							NOT STARTED - Task not started		
T5.3	Measurement of the KPIs as earlier defined in WP3 and recommendations	ENED	T3.1, T5.2	40		48							NOT STARTED - Task not started		

Figure 3: Screenshot of the task reporting template - example of columns to fill in









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### 3.2.1.2 Deliverables reporting templates

List of the project deliverables is provided below, with the indication of the expected delivery date and leading beneficiary, according to Annex 1 of the DoA.

ID	Deliverable name	WP	Lead	Type	Dissemination	Due date
D1.1	Quality management plan	1	ENED	R	PU	M02
D1.2	1 <sup>st</sup> periodic report on the progress of work and use of resources	1	ENED	R	CO	M14
D1.3	2 <sup>nd</sup> periodic report on the progress of work and use of resources	1	ENED	R	CO	M26
D1.5	Final report on the progress of work and use of resources	1	ENED	R	CO	M50
D2.1	Definition of services and use cases description	2	ENED	R	PU	M12
D2.2	Definition of project overall system architecture	2	ERDF	R	PU	M12
D2.3	Data model and interfaces	2	ERDF	R	PU	M12
D3.1	Definition of project KPIs and a common methodology across the demos	3	ENED	R	PU	M18
D3.2	Cross-case analysis of the results from the demonstrations	3	VaasaETT	R	PU	M48
D4.1	EU Market Place: specifications	4	SAP	R	CO	M16
D4.2	EU Market Place: monitoring and connectivity component	4	UL	OTHER	CO	M24
D4.3	EU Market Place: validation tool and software development kit	4	UL	OTHER	CO	M32
D4.4	EU Market Place: REX and lesson learned	5	SAP	R	PU	M48
D5.1	Detailed planning of the Italian demonstration	5	ENED	R	CO	M28
D5.2	Results achieved in the Italian demonstration	5	ENED	R	PU	M48
D6.1	Description of the development of DSO and service platforms and interaction with the Market Place the French demo	6	ERDF	R	CO	M28
D6.2	Assessment of interoperability and near to real-time measurement of the Linky smart-metering system	6	ERDF	R	CO	M36
D6.3	Assessment of the business models developed in the French demo	6	KIWI	R	PU	M48
D7.1	Integration of DSO systems with Energy Management System Platform for the Spanish demo	7	ENDD	OTHER	CO	M12
D7.2	Aggregator Service Platform services and architecture for the Spanish demo	7	ENDSA	R	CO	M24



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D7.3	Industrial and residential energy box for the Spanish demo	7	CIRCE	DEM	CO	M28
D7.4	Report on the integration of the infrastructure with the new platforms for the Spanish demo	7	ENDSA	R	PU	M30
D7.5	Aggregator service platform integration with customer requirements (Malaga City) for the Spanish demo	7	AGMEM	OTHER	CO	M32
D7.6	KPI measurements and calculations and demo evaluation for the Spanish demo	7	CIRCE	R	PU	M48
D8.1	Description of DSO and Service platforms and interactions with the EU Market Place for the Swedish demo	8	VEL	R	CO	M28
D8.2	Detailed plan of the Swedish field test	8	VEL	R	CO	M28
D8.3	Report on the results achieved in the Swedish demonstration	8	VEL	R	PU	M48
D9.1	Description of VERBUND and CYBERGRID Service platform and interaction with the EU Market Place	9	CYBERGRID	R	CO	M28
D9.2	Detailed plan of the Austrian and pan-European field tests	9	VERBUND	R	CO	M28
D9.3	Report on the results achieved in the Austrian and pan-European demonstrations	9	VERBUND	R	PU	M48
D10.1	The adapted ERA Tool integrated into the Market place	10	JOULE	R	CO	M18
D10.2	Description of preliminary business and market model options of the experimentally demonstrated use cases	10	JOULE	R	PU	M48
D10.3	The mapping of enabling factors and barriers	10	JOULE	R	PU	M28
D11.1	Dissemination and Communication plan	11	ENED	R	PU	M12
D11.2	Project web site and other media	11	ENED	DEC	PU	M12
D11.3	Exploitation plans V1, V2, V3 and final (year 1, 2, 3 and 4)	11	ENED	R	CO	M12, 24, 36, 48
D11.4	Data Management Plan	11	ENED	R	CO	M12
D11.5	Final project conference proceedings to disclose the consortium conclusions and recommendations	11	ENED	R	PU	M48
D11.6	Final project report and recommendations	11	ENED	R	PU	M50

**Table 2: List of project deliverables**

A Deliverable Reporting Template (inside “*FLEXICIENCY\_Task\_Deliverable\_Reporting.xls*”) will be used by the PC to monitor the status of each deliverable and will be sent to PC by WPLs who will complete it every quarter. It will be the formal instrument for WPLs to communicate specific issues



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associated to deliverables to the EB. In particular, the status of each deliverable will be labelled by specifying the percentage of completion as follows:

% Completion	Description
0%	Not started
10%	Table of Contents defined
30%	Drafting of deliverable begun /Writing ongoing
60%	Draft ready for peer review
75%	Peer review completed (new draft under preparation for EB approval)
90%	Deliverable ready for EB approval
100%	Deliverable approved by EB and uploaded in the ECAS System
150%	Redrafting of deliverable following request by EC after formal review
190%	2 <sup>nd</sup> version of deliverable ready for Management Board approval
200%	2 <sup>nd</sup> version of deliverable approved and uploaded in ECAS System

**Table 3: Percentage of completion of project deliverables**

Figure 5 displays a screenshot of the spreadsheet provided. Templates can be updated in the course of the project to the extent is needed.

Deliverable No.	Title	Lead Partner	Type	CO	Review Partners	Due Date (M)	STATUS	Issue for EB	m1 m2 m3 m4 m5 m6						
									Q1	Q2					
<b>WP1</b>		<b>ENED</b>													
D1.1	Quality management plan	ENED	R	PU	EDSO; VERBUND	2	APPROVED	-	100%						
D1.2	1st periodic report on the progress of work and use of resources	ENED	R	CO	0	20									
D1.3	2nd periodic report on the progress of work and use of resources	ENED	R	CO	0	38									
D1.4	Final periodic report on the progress of work and use of resources	ENED	R	CO	0	50									
<b>WP2</b>		<b>ERDF</b>													
D2.1	Definition of services and use cases description	ENED	R	PU		12									
D2.2	Definition of project overall system architecture	ERDF	R	PU		12									
D2.3	Data model and interfaces	ERDF	R	PU		12									
<b>WP3</b>		<b>VEL</b>													
D3.1	Definition of project KPIs and a common methodology across the demos	ENED	R	PU		18									
D3.2	Cross-case analysis of the results from the demonstrations	VAASAETT	R	PU		48									
<b>WP4</b>		<b>SAP</b>													
D4.1	EU Market Place: specifications	SAP	R	CO		16									
D4.2	EU Market Place: monitoring and connectivity component	UL	OTHER	CO		24									
D4.3	EU Market Place: validation tool and software development kit	UL	OTHER	CO		32									
D4.4	EU Market Place: REX and lesson learned	SAP	R	PU		48									
<b>WP5</b>		<b>ENED</b>													
D5.1	Detailed planning of the Italian demonstration	ENED	R	CO		28									
D5.2	Results achieved in the Italian demonstration	ENED	R	PU		48									

**Figure 5: Screenshot of the deliverable reporting template**

### 3.2.1.2 Milestones reporting templates

List of the project milestones is provided below, with the indication of the expected date and lead beneficiary, according to Annex 1 of the DoA.



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ID	Name	Date	Lead
MS1	Kick off meeting	M1	ENED
MS2	Quality management plan delivered	M2	ENED
MS3	Use cases to be demonstrated or simulated have been selected	M12	ENED
MS4	Data models accepted by the partners and possibly other stakeholders	M12	ERDF
MS5	Common methodology and project KPIs defined	M24	ENED
MS6	Inputs for recommendations delivered to WP11	M42	VAASAETT
MS7	EU Market Place: specifications	M16	SAP
MS8	EU Market Place: development of the market place functionalities and integration solutions for DSO's and service platform providers	M24	UL
MS9	EU Market Place: test of the market place and integration with DSO and Service platform	M21	UL
MS10	EU Market Place: maintenance of the market place	M42	UL
MS11	EU Market Place. Phase market Place production deployment: starting with internet browser and in a second step integrated with solutions for DSO's and service platform providers	M24	UL
MS12	Development and deployment of validation tools and software development kit	M48	UL
MS13	Both platforms have been tested (DSO and service platforms) and connection with the Market Place are operational	M28	SIEMENS
MS14	Customers have been recruited and all necessary devices has been distributed and installed	M32	ENED
MS15	Both platforms have been tested (DSO and ERA Tool) and connection with the Market Place are operational	M28	ERDF
MS16	Customers have been recruited and the Linky metering system is operational	M28	ERDF
MS17	Aggregator Service Platform ready	M28	ENDSA
MS18	All equipment commissioned and ready for demonstration	M30	ENDSA
MS19	Malaga demo evaluated	M48	ENDSA
MS20	System concept ready for demonstration	M24	VAB
MS21	Demonstration evaluated and KPI measurements ready	M48	VEL
MS22	Connection to Market Place	M28	CYBERGID
MS23	Start of Full Demonstration. Demonstrations fully activated with all features enabled	M30	VERBUND
MS24	Demonstration concluded	M42	VERBUND
MS25	The adaption of the ERA Tool to the European Market Place	M12	JOULE
MS26	Project website	M12	ENED



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MS27	Results and recommendation disseminated through various channels	M48	ENED
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**Table 4: List of project milestones**

A Milestone Reporting Template (inside “*FLEXICIENCY\_Task\_Deliverbale\_Reporting.xls*”) will be provided by the PC to WPLs to monitor the status of each milestone. WPLs will complete and communicate it to the PC every quarter, and will be the formal instrument for WPLs to communicate specific issues associated to milestones to the EB. A screenshot is provided below.

Milestone No.	Title	Lead Partner	Due Date as from DoA (M)	Expected by:	Status	(to be) Verified by:	Dependencies with tasks	Key notes	Issue for EB
<b>WP1</b>	<b>ENED</b>								
<b>MS1</b>	Kick off meeting	ENED	1	1	ACHIEVED	MoM			-
<b>MS2</b>	Quality management plan delivered	ENED	2		ONGOING	D1.1			
<b>WP2</b>	<b>case, service definitions and system architect ERDF</b>								
<b>MS3</b>	Use cases to be demonstrated or simulated have been selected	ENED	12						
<b>MS4</b>	Data models accepted by the partners and possibly other stakeholders	ERDF	12						
<b>WP3</b>	<b>is definition and assessment of the demonstrati VEL</b>								
<b>MS5</b>	Common methodology and project KPIs defined	ENED	24						
<b>MS6</b>	Inputs for recommendations delivered to WP11	VAASAETT	42						
<b>WP4</b>	<b>velopment of the Market Place for Energy Servi SAP</b>								
<b>MS7</b>	EU Market Place: specifications	SAP	16						
<b>MS8</b>	EU Market Place: development of the market place functionalities and integration solutions for DSO's and service platform providers	UL	24						
<b>MS9</b>	EU Market Place: test of the market place and integration with DSO and Service platform	UL	21			T5.1, T6.1, T7.2, T8.1 T9.1	T5.1, T6.1, T7.2, T8.1 T9.1	Demos to get ready in time	Demos monitoring to get ready in

**Figure 6: Screenshot of the milestone reporting template**

In particular, the status of each milestone will be marked as follows:

NOT SCHEDULED	Milestone not scheduled in the current year according to the DoA
ONGOING WITH PROGRESS	Activities to reach the milestone ongoing with progress
ONGOING WITH ISSUE FOR THE EB	Activities to reach the milestone ongoing but there are relevant issues that might cause delay to be brought to the attention of the EB
ACHIEVED	Milestone achieved
DELAYED	Delay in the activities to reach the milestone. Need to be brought to the attention of the EB for decision and solution.

**Table 5: Status of the project milestone as from the milestone template**

### 3.2.2 Progress and cost reporting

According to the FLEXICIENCY Consortium Agreement, every six months, partners will have to inform the PC of their relevant incurred costs (both in terms of PMs and other costs incurred) for each WP (this includes explanation of the work carried out in the related Tasks).

For this purpose a **template for PM monitoring**, provided by the PC, will be **completed by each beneficiary** (and linked third parties), and will show the following information:

- Person-Months specifying:



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- Actual cumulative person-months for the WP – no need to fill this cell; this is an automatic sum of the person-months reported in the subsequent semesters)
- Total person-months for the WP (according to the DoA) – *need to fill it*
- Remaining total is calculated by the spreadsheet – no need to fill it
- Person-months for the semester (1 to 8) – *need to fill it*
- Actual person-months RP (1 to 3) – no need to fill it; this is an automatic sum of the person-months reported in the relevant semesters.
- Forecast of PMs for the project for each RP (RP 1 to 3) – *need to fill it*; this is an estimation of the work to be carried out for the 3 reporting periods. It could be used by each partner to verify internally the consistency of PM consumptions in the RP with respect to the planned activities.
- Remaining total in the relevant RP with respect to the forecast is calculated by the spreadsheet – no need to fill it.

Semester	Reporting Period
S1: February 2015 – July 2015	RP1
S2: August 2015 – January 2016	
S3: February 2016 – July 2016	
S4: August 2016 – January 2017	RP2
S5: February 2017 – July 2017	
S6: August 2017 – January 2018	
S7: February 2018– July 2018	RP3
S8/FINAL: August 2018 – January 2019	

**Table 6: Project semesters for internal progress and cost reporting**

- Description of activities with respect to declared PM in the relevant semester (including identification and brief description of the activities performed). Corresponding tasks will be indicated by specifying the participation to the Task activities (Yes/No from the dropdown menu).

Figure 7 displays a screenshot of the provided template for PM monitoring. Templates can be updated in the course of the project to the extent is needed.







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## 4. Deliverables Production

Deliverables are main outputs of the FLEXICIENCY project to be issued according to the schedule included in the DoA (the respect of the due date and expected technical and quality standards is contractually required). They are analysed by EC reviewers and constitute a major basis for project assessment and financing approval by the EC.

In order to assure an effective and high technical and editorial quality production of project deliverable in good time, the project has identified the following main actors and responsibility in the document production.

Role/Responsibility	Responsibility
Author(s)	Write(s) the deliverable taking the necessary inputs and in coordination with contributors and participants in the relevant task/WP
Document Responsible (DR)	Manages the document production assuring internal coordination in the relevant task for the deliverable and nominates Author(s) (only one single DR can exist, usually one of the Authors). The DR, together with the WPL, plans the production of the document, taking into account the time needed for the review procedure and the due date. The DR is also responsible for organising and coordinating the review process. Before each review process starts, the DR warns the appointed reviewers and asks for voluntary reviewers, if any.
Reviewer(s) (RW)	Perform(s) the Review Procedure of the deliverable. There are either 'appointed' reviewers or 'voluntary' reviewers (self-appointed based on an interest to give contribution in the review activity). These partners are responsible for reviewing the deliverables before formal approval of the Executive Board.
Task Leader (TL)	Nominates the DR. TL and DR can be the same person.
WP Leader (WPL)	WPL decides by agreement with DR, to put forward the deliverable for approval to the EB. Together with the DR, the WPL plans the production of the document, taking into account the time needed for the review procedure and the due date. The WPL informs the PC about the document production plan and is also responsible for putting forward the deliverable to the EB.
Executive Board (EB)	Formally approves the deliverable
Project Coordinator (PC)	Formally issues the document: (i) uploading on the EC participant portal; (ii) uploading on the project web portal for public documents

**Table 7: Roles and responsibility in the deliverable production process**





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## 4.1 Review process for deliverables

The review activity is performed as described in the following paragraph. Each partner is entitled to review and comment every deliverable in due time. However, for sake of good order, mandatory reviewers will be appointed and are in charge of performing the review when requested. The lists of reviewers can be modified in the course of the project.

### 4.1.1 Criteria and list of reviewers

A minimum of two reviewers are required per deliverable. To the extent it is possible in consideration of the allocated participant effort in each WP and/or other relevant issues, the following criteria have been defined for the nomination of reviewers:

1. *Reviewers' activity should be balanced with the partners' involvement in the specific WP/Task:* it implies that in principle WP/task leaders should not act as appointed reviewers as well.
2. *Reviewers should have in their budget person months in the WP:* this is meant to assure cost eligibility and effort availability in the relevant WP. Exceptionally, in some cases, cross WP review could be judged as appropriate, and effort possibly allocated under Task 1.4 'Quality Management' (this would be the case of Reviewers not having PMs in the relevant WP for the deliverable)
3. *Reviewers' activities have to be balanced in the WP and in the overall Project:* the number of reviews assigned to the partners should be balanced and reasonable in consideration of the allocated effort of participants in the action
4. *Deliverable relevance* in consideration of WPs/tasks interdependences and expected impact of the deliverable results on the following relevant actions.

Based on the above mentioned criteria, a first list of official Reviewers will be proposed by the PC to better plan and optimise the partner work at the beginning of the project and will be discussed and approved at the first Executive Board (at least for the first RP)..

### 4.1.2 Details of the review process

FLEXICIENCY has defined a formal review process with the goal to ensure high quality standard for the produced deliverables, while achieving the planned completion date.

#### 4.1.2.1 Coding of deliverables

Within each phase of the writing of the deliverable, the history will be tracked following a correct completion of the REVISION HISTORY section of the deliverable, which will be included in every deliverable.



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Version	Date	Author	Notes
v0.1			1 <sup>st</sup> draft
v0.1_rev_MARRETTAL_ENED			1 <sup>st</sup> draft reviewed by [Laura Marretta of Enel Distribuzione]
v0.2			2 <sup>nd</sup> draft of document prepared by DR (takes into account reviewer comments)
....			...
V0.n			Version ready for approval by the Executive Board
<b>v1.0</b>			<b>Release.</b> Version approved by EB and (ready to) upload(ed) in the ECAS system by the PC
v1.1			Drafting of 2 <sup>nd</sup> version of deliverable accounting for EC requests (if any) <sup>(*)</sup>
...			...
v1.n			2 <sup>nd</sup> version of deliverable ready for approval by the EB
<b>v2.0</b>			<b>Release.</b> 2 <sup>nd</sup> version of deliverable approved by EB and uploaded in ECAS system

<sup>(\*)</sup>Version coding necessary only in the case EC requests some adjustments/modification after official review by the EC

**Table 8: Deliverable coding**

The document will be named following these nomenclature rules:

- Naming of the deliverables (FLEXICIENCY\_WP[X]\_D[Y.Y]\_v[Z.Z]\_[\_rev\_(LASTName-ORGANIZATION)]\_(A/NA/AC)):
  - WP[X]: WP Number related to the deliverable
  - D[Y.Y]: Deliverable Number
  - v[Z.Z]: Version of document.
  - [\_rev\_(LASTName-ORGANIZATION)]: revision of a specific version of deliverable & corresponding name of reviewer and organization.
  - (A/NA/AC): code indicates the status of documents approval as better detailed below

#### 4.1.2 .2 Timing of deliverables review

The process for deliverable review is detailed below:

1. **9 weeks before document delivery date**, DR forewarns the appointed reviewers, asks for voluntary reviewers (if any) and prepares and share plans. During this time the document gets ready for official review and integrates last further comments from the task and deliverable contributors and the WP leader;
2. **at least 5 weeks before document delivery date** DR submits documents to the RW for their review, keeping informed the PC and the WP leader; this is the minimum timeline set for sending the document to reviewers, however the production plan of the document should always consider holidays and leave accordingly enough timeline for the execution of



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the review process (e.g. the review process of a deliverable to be submitted by the end of January shall start not later than mid December).

3. **within 5 to 10 working days** the reviewers have to provide, if any, due comments to the documents in **track change mode** and send them to the DR with the following code at the end of the filename:
  - **A** = approved (good to be issued as final version)
  - **NA** = not approved (not acceptable and to be reissued)
  - **AC** = approved with comments (minor comments have to be implemented and then the document can be considered approved), providing that comments will be implemented.

In case the DR does not agree with comments, he can propose to reject them, explaining via email the reasons to the RW and asking them for confirmation. The revision history of the document shall be completed by RW.

Review is targeted to take 5 working days. Extra working days might be required in case major revisions and new comments after first issuing. However, **the review process should be completed in no longer than 10 working days;**

4. **3 Weeks before delivery due date** the received and agreed comments are implemented by the document responsible, which is then sent to the WP leader for approval, keeping informed the PC. This activity can last maximum until 2 weeks before the official issuing date but it targeted to be shorter.
5. **2 Weeks before delivery due date**, WPL approves the document in its final version
6. **1 Week before delivery due date** the Document Responsible finalises format, issuing the document officially for approval to the Executive Board.



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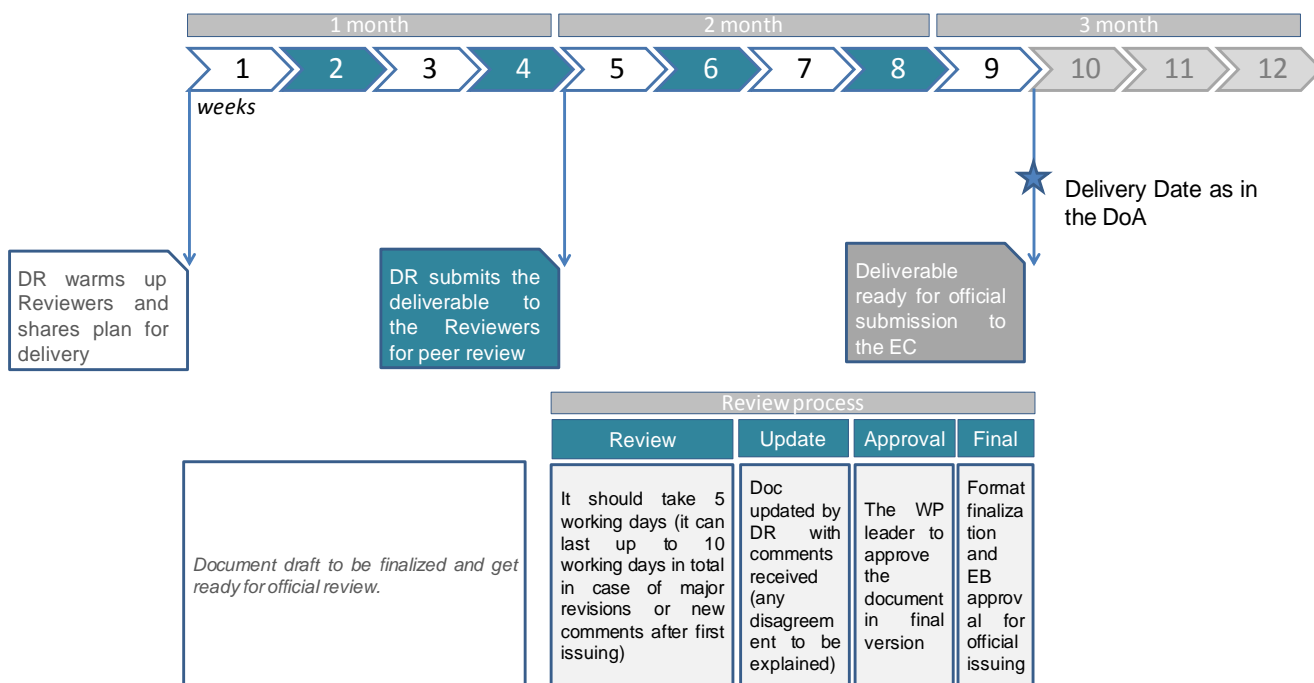


Figure 9: Review process and timeline

## 5. Risk assessment

As defined in the Description of the Action, the Consortium has conducted an analysis of the managerial and technological risks that may compromise the achievement of the project's objectives. Preventive corrective actions have been defined on the basis of the Work Plan, with the aim of mitigating or eliminating (i) the most foreseeable risks, and (ii) risks with the largest negative potential impact on the project's success. Risks that could not be completely eliminated have been studied in detail in order to prepare a reasonable backup plan in case they occur (see table below).

Description of risk	WP	Proposed mitigation measures
Stringent deadlines not met to keep the quality of the results at the level decided by the consortium	WP1	- Tight schedule management of the EB - Agree on the critical use cases to be studied and avoid an inflation in services to be tested
Difficulties to converge on the use cases and the associated services to be tested in each demo	WP2	- Avoid inflation of services to be tested and select use cases with reasonable development times and technical risks
Difficulties to agree upon the data models and the communication protocols	WP2	- Data models to be first shaped by DSOs as regulated players before accounting for feedbacks by service providers - Robust and secure communication protocols to be used to guarantee interoperability and service accessibility by all stakeholders.
KPIs prove to be not adapted to the evolving context of the demonstrations	WP3	KPIs to be tested early in the project when first results come out from the demos in order to correct potential



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		failures
Integration of the Market Place and the service platforms proves to be more challenging than expected	WP4	<ul style="list-style-type: none"> <li>- Regular exchanges between IT solution providers and DSO/service provider developers</li> <li>- Early tests of the SDK (software development kit) by DSO/service provider developers to remedy potential mismatches</li> </ul>
Data privacy: use of consumer data	WP5-9	Each demo leader implements the necessary legal framework to have access to consumer data
Technical difficulties in upgrading existing DSOs and service platforms	WP5-9	Regular meetings to address any technical issues
Platform unable to handle data becoming closer to real-time	WP5-9	<ul style="list-style-type: none"> <li>- Run preliminary tests on a limited number of customers.</li> <li>- Test infrastructure early in the project with machine generated data.</li> </ul>
Difficulties to reach interoperability in a multi-vendor environment	WP6	- Close collaboration with all vendors (smart meter, CPL and concentrators) involved in the tests
Reluctance of consumers to participate in active demand	WP5, 7, 8, 9	<ul style="list-style-type: none"> <li>- Start recruitment campaigns in due time</li> <li>- Plan in the demo budgets incentives to motivate early adopters</li> <li>- Consult ongoing / past projects with this experience</li> </ul>
Difficulties in finding a sufficient amount of commercial and industrial customers to simulate flexibility services	WP9	<ul style="list-style-type: none"> <li>- Start recruitment campaigns in due time</li> <li>- Plan in the demo budgets incentives to motivate early adopters</li> <li>- Consult ongoing / past projects with this experience</li> </ul>
Telecommunication problem in the deployment of energy boxes and other measurement devices	WP5, 7, 8, 9	Tests to be run with telecom operators before the large scale deployment of the equipment
Difficult to adapt the ERA tool to the European context	WP10	The Joule Asset development team will assess potential difficulties before starting development and will rely on simplified models if necessary
Assessment of the business and market model options process to be more challenging than expected	WP10	Partners will focus on key parameters based upon sensitivity analyses
Difficulties in building external stakeholder networks	WP11	The project will be advertised during numerous smart grid communication events in order to catch the interest of the targeted stakeholders

**Table 9: List of the project risks**

The risk management approach to be adopted in the project includes a methodical process by which the project identifies, scores, and ranks the various risks. In particular, risks, either technical or managerial, will be analysed using both impact and probability classifications: (i) impact is based on project performance, schedule, cost and/or expected outcomes; (ii) probability provides with an order of magnitude based on experience, both classified as follows:

Impact classification	
Low	No/almost no effect on the project, possibly causing small cost/schedule increase, without jeopardising the achievements of final project goals.
Medium	Moderate cost/schedule increases, but important project outcomes and main goals would be met (possibly jeopardising the achievement of less relevant objectives).



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High	Project fail or objectives achievement severely jeopardised
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**Table 10: Classification of impact for risk assessment**

Probability classification	
Unlikely	Very unlikely/low probability to occur
Likely	May occur (about half of the time)
Very likely	Very likely to occur / expected to occur

**Table 11: Classification of probability for risk assessment**

Risk items will be assigned an exposure grade based on the combinations of impact/probability according to the following equation:  $[RI = Impact \times Probability]$ , where RI is a simple qualitative Risk Indicator as result of the multiplication of above parameters. In particular:

- impact is quantified in an scale from 0 to 100 (0 = no/low impact, 50= medium, 100 = high)
- probability is quantified in an scale from 0 to 100 (0 = unlikely, 50 = likely 100 = very likely to occur)

According to the combination of the above, risk will be labelled as follows:

RI classification	
Low Risk	Risk is acceptable (only to be monitored during the project)
Medium Risk	Mitigation actions are needed (risk likely to be reduced/minimised afterwards)
High Risk	Mitigation actions are urgently needed and need to be discussed and closely monitored by the EB

Mitigation actions should be identified accordingly to turn potential high risks into low risks.

It is planned that the WPLs, which will assume the role of Risk Managers for their Work Packages, will fill in the template provided by the PC (with all the necessary inputs provide by TLs) and will report on WP risks at each EB meeting (or whenever critical issues on risk mitigation are raised).

At each EB meeting, WP leaders will present an updated risk and contingency plan with a focus on the WP's related activities.

PC aggregates and monitors together with the EB the list of the project risks, based on those highlighted in the Task Deliverables reporting spreadsheet. Template to be completed (inside the "FLEXICIENCY\_Task\_Deliverbale\_Reporting.xls") is reported here below.

