HORIZON-CL5-2024-D3-02-06
Grant Agreement 101230578

INNOvative Transactive Renewable Energy Communities

D9.1-Project Management Plan

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ACRONYMS

ACRONYMS	
AI	Artificial Intelligence
CA	Consortium Agreement
CFS	Certificates on the Financial Statements
DLT	Distributed Ledger Technology
DMP	Data Management Plan
DSS	Decision Support System
EAB	Ethics and Data Protection Advisory Board
EIB	Exploitation and Innovation Board
EXB	Executive Board
GA	Grant Agreement
GEA	General Assembly
IAB	International Advisory Board
IoT	Internet of Things
IPR	Intellectual Property Rights
P2P	Peer-to-Peer
PCO	Project Coordinator
PMO	Project Management Office
PMP	Project Management Plan
PO	Project Officer
PU	Public
R	Report
RAG	Replication Advisory Group
REC	Renewable Energy Community
RR	Risk Register
SEN	Sensitive
TEC	Technical Coordinator
ToC	Table of Contents
WP	Work Package

CONSORTIUM

Number	Legal name	Acronym	Country
01	Universidade do Porto	UPORTO	PT
02	Cleanwatts Digital SA	CWD	PT
03	Fondazione LINKS - Leading Innovation & Knowledge for Society	LINKS	IT
04	Politecnico di Torino	POLITO	IT
05	DOMX Idiotiki Kefalaiouchiki Etaireia	DOMX	EL
06	Cluster Viooikonomias Kai Perivallontos Dytikis Makedonias	CLUBE	EL
07	Energeiaki Koinotita Vlastis	ECV	EL
08	Universidad de Castilla - La Mancha	UCLM	ES
09	Akkodis High Tech SAS	AKKO	FR
10	Elektroinstitut Milan Vidmar	EIMV	SI
11	Vlaamse Instelling Voor Technologisch Onderzoek N.V.	VITO	BE
12	Klimaan	KLIMA	BE
13	Teknologian Tutkimuskeskus VTT OY	VTT	FI
14	EPRI Europe DAC	EEU	IE
15	University College Cork - National University of Ireland, Cork	UCC	IE
16	Mol Teic	DINGLE	IE
17	DCSix Technologies Limited	DCS	IE
18	Electric Corby Community Interest Company	ECORBY	UK
19	Cranfield University	UCRANF	UK
20	Energise Barnsley Limited	EBARNS	UK

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Executive Summary

INNO-TREC (INNOvative Transactive Renewable Energy Communities) is a 42-month Horizon Europe action that targets the deployment and scaling of digital, market and socio-technical solutions for Renewable Energy Communities (RECs). The project combines interoperable digital infrastructures, data-driven decision support and community-centred mechanisms to strengthen the performance and long-term sustainability of PV-based RECs. The work programme is implemented through nine interrelated Work Packages. It is validated across six REC demonstration sites in six countries (Portugal, Greece, Belgium, Ireland, the United Kingdom, and Italy), selected to represent diverse community typologies and operating contexts.

This deliverable (D9.1) provides the Project Management Plan (PMP) for INNO-TREC. The PMP is the reference framework for project coordination, governance and operational procedures. It sets out how the consortium organises decision-making and execution across Work Packages and DEMOs, how progress is monitored against milestones and deliverables, and how the project ensures administrative and financial consistency with the Grant Agreement (GA). WP9 (Project Management and Coordination) leads the implementation of this framework throughout the full project duration.

The PMP describes: (i) the overall structure of the work plan, including WP scope, logical interconnections, phased execution and effort distribution; (ii) the organisational set-up, including the Project Coordinator and the supporting governance bodies (GEA, EXB, EIB and PMO), as well as advisory structures (IAB, EAB and RAG); (iii) the project risk management approach, including the initial Risk Register and its monitoring and escalation pathways; (iv) the quality management process for deliverables, with internal review stages, versioning practice and common presentation standards; (v) internal and external communication routines, meeting types and expected cadence; and (vi) periodic reporting arrangements, aligned with the project reporting periods and the requirements of the EU Funding & Tenders Portal.

INNO-TREC operates in a dynamic environment shaped by technology integration, user engagement, market design and multi-country validation activities. For this reason, the PMP is intended to be used as a living management instrument. Planned updates are captured in the project's management deliverables (D9.2 at Month 24 and D9.3 at Month 42). In addition, the project's external advisory engagement (particularly through the International Advisory Board) will be documented via the cooperation and progress reporting deliverables referenced in the PMP (e.g., cooperation outcomes and meeting minutes). Together, these mechanisms ensure that management practices remain aligned with project evolution, support timely delivery, and reinforce INNO-TREC's replication and impact objectives.

Overall, this PMP provides the operational backbone required to coordinate consortium activities, assure quality, manage risks, and maintain compliance throughout INNO-TREC's implementation.

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Introduction

The **INNO-TREC** (Innovative Tools for Renewable Energy Communities) is a 42-month Horizon Europe action which aims to accelerate the digital, social and market transformation of **Renewable Energy Communities (RECs)** across Europe. Structured into **9 interrelated Work Packages (WPs)**, the project combines technological innovation, market design, integration with the social sciences and large-scale validation across **six demonstration sites in six countries**. Aligned with Horizon Europe Cluster 5 priorities and broader EU decarbonisation strategies, **INNO-TREC** addresses the core challenge of empowering RECs with interoperable digital tools, Artificial Intelligence (AI)-driven decision-support systems, blockchain-enabled energy credits mechanisms, and user-centric governance models, while ensuring inclusiveness, gender sensitivity and SSH integration.

Work Package 9 (WP9) – **Project Management and Coordination**, running from Month 1 to Month 42, is responsible for ensuring the coherent, timely and cost-effective implementation of the action. WP9 **coordinates the actions** of all beneficiaries, **monitors progress** towards milestones and deliverables, **ensures financial and administrative management** in full compliance with the Grant Agreement (GA), and **implements risk management and intellectual property (IPR) strategies**.

This deliverable, the **Project Management Plan (PMP)**, constitutes the foundational framework for **INNO-TREC**'s management and coordination activities. It defines the operational procedures, quality assurance mechanisms, risk management methodology, financial reporting guidelines, deliverable lifecycle processes, communication rules and governance alignment necessary to ensure compliance with the Horizon Europe Model Grant Agreement. In accordance with Article 21 of the GA, project implementation will be monitored through continuous and periodic reporting via the EU Funding & Tenders Portal, including two reporting periods (M1–M24 and M25–M42) with corresponding interim and final payments. The PMP also establishes procedures for ethics, data protection, open science compliance and data management planning, as required under Horizon Europe rules.

Given the dynamic nature of innovation, regulatory evolution and large-scale demonstrations across six RECs, this PMP is conceived as a living document. It will be regularly monitored and, if necessary, updated to reflect amendments to the GA, emerging risks, governance adjustments, or significant implementation changes. Updates may be triggered by reporting milestones, consortium decisions, or recommendations from advisory bodies, ensuring that project coordination remains fully aligned with **INNO-TREC**'s objectives, budgetary framework and impact pathway throughout its 42-month duration.

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Overview of the Project

INNO-TREC aims to boost the profitability and long-term sustainability of PV-based RECs by combining (i) an energy credits platform enabling decentralised value exchange, (ii) an AI-driven decision-support system, and (iii) an interoperable "federation of platforms" approach for cross-sector data exchange, with secure data transfer ensured via Distributed Ledger Technology (DLT).

The project explicitly positions itself within key EU energy transition and digitalisation policy lines, referencing the Clean Energy for All Europeans package, the European Green Deal, REPowerEU, the Digitalisation of the Energy System agenda, and EU energy communities policy. Besides, the project plans to validate its solutions and products through **6 REC DEMOs in 6 countries** (Portugal, Greece, Belgium, Ireland, the UK, Italy), covering different community typologies and social contexts, including energy poverty and social innovation angles. **INNO-TREC** has **9 Specific Objectives** (SO1-SO9):

- **SO1**: Development of the **innovative reference architecture** of **INNO-TREC** to support data exchange in RECs, facilitate secure and robust communication protocols, adopt cross-sectoral approaches and increase data interoperability, leading to the requirements and specifications of the proposed federation of platforms.
- **SO2**: Development of a **new data management infrastructure** with emphasis on security and reliability to seamlessly integrate data from Internet of Things (IoT) devices, developing an AI-driven Decision Support System (DSS) tool to optimise the operation for RECs through a hierarchical control level structure, ensuring secure data transfer using DLT.
- **SO3**: Development of remarkably **enhanced community engagement** focused on behavioural characteristics, readiness for new technologies adoption and social innovation potential, fostering inclusive and participatory decision-making processes, supported by innovative financing mechanisms and by investment models.
- **SO4**: Development of **novel modelling** and **design tools** for all system components of RECs, considering the technical information on the PV systems and storage systems, fully characterising energy users and the consumption behaviours and defining clear criteria for aggregating end-users to maximise economic benefits.
- **SO5**: Development of **novel simulation tools** of the energy flows measured at the consumption and the production meters of RECs, creating optimally sized RECs from an operation context to a planning context based on economic viability indicators and performing both sensitivity and risk analyses under uncertainty.
- **SO6**: Development of **novel monitoring** and **evaluation tools** for the energy flows in the local PV systems with demand and storage data taken from REC assets, precisely evaluating the yield and performance of the PV systems that make up RECs, including the corrective and predictive maintenance of all community assets
- **SO7**: Development of a **groundbreaking energy credits platform** considering an innovative energy credits mechanism and a full market design, in line with existing regulations, ensuring secure and transparent energy sharing and peer-to-peer (P2P) transactions using blockchain technologies while allowing full customizability.

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- **SO8**: Development of **innovative explicit** and **implicit flexibility mechanisms** able to support the collective sharing of intermittent renewable energy sources within the REC, coupled with the internal and external value streams, ensuring the proper incentives for beneficial collective REC behaviours from a flexibility viewpoint.
- **SO9**: Development of **innovative, economically attractive PV-based communities** that integrate flexibility services, incentive mechanisms and energy markets, together with internal allocation schemes and dynamic response mechanisms, leveraging flexible assets to maximise the economic value of RECs while ensuring full alignment with external stakeholders and addressing energy poverty, considering **6 RECs** in **6 countries**.

In **INNO-TREC**, the work plan is monitored through **14 project milestones** (M1.1–M9.1), listed in Table 1. Table 2 provides an overview of the **INNO-TREC deliverables**, explicitly linking each deliverable to the **task** responsible for producing it.

*Table 1 - **INNO-TREC** milestones*

MILESTONE NO.	MILESTONE NAME	WP NO.	LEAD BENEFICIARY	MEANS OF VERIFICATION	DUE DATE (MONTH)
1 (M1.1)	Use cases ready and REC requirements complete	WP1	EIMV	D1.1 approved	12
2 (M2.1)	Data management infrastructure ready	WP2	LINKS	D2.1 approved	12
3 (M2.2)	AI-driven DSS development and secure data transfer ensured	WP2	LINKS	D2.2, D2.3, D2.4 approved	18
4 (M3.1)	Energy transactive value defined	WP3	UPORTO	D3.3 approved	15
5 (M3.2)	Community dynamics and technologies acceptance assessed	WP3	VTT	D3.1, D3.2, D3.4 approved	18
6 (M4.1)	System components modelling ready	WP4	POLITO	D4.1 approved	21
7 (M4.2)	Aggregation, simulation and economic viability complete	WP4	UCLM	D4.2, D4.3, D4.4 approved	27
8 (M5.1)	Operation and maintenance tools ready	WP5	POLITO	D5.1, D5.2, D5.3 approved	23
9 (M5.2)	Energy credits platform ready	WP5	UPORTO	D5.4 approved	27
10 (M6.1)	Energy credits market design complete	WP6	UPORTO	D6.1 approved	21
11 (M6.2)	Both implicit and explicit flexibility mechanisms assessed	WP6	VITO	D6.2, D6.3, D6.4 approved	27
12 (M7.1)	DEMO results validation complete	WP7	CWD	D7.3-D7.8 approved	39
13 (M8.1)	Project identity and communication material ready	WP8	EEU	D8.1 approved	3
14 (M9.1)	Project Management Plan and DMP complete	WP9	UPORTO	D9.1, D9.2 approved	6

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*Table 2 - **INNO-TREC** deliverables*

DELIVERABLE	TITLE	WP	LEAD BENEFICIARY	TYPE	DISSEMI-NATION LEVEL	DUE DATE (MONTH)
D1.1	EU Landscape of PV Use	WP1	EIMV	R	PU	12
D1.2	Cross-Sector Approach	WP1	POLITO	R	PU	15
D1.3	Federation of Platforms	WP1	LINKS	R	PU	15
D1.4	Reference Architecture	WP1	AKKO	OTHER	PU	18
D2.1	Data Management	WP2	LINKS	R	PU	12
D2.2	IoT Devices and Comms	WP2	AKKO	R	PU	15
D2.3	Decision Support System	WP2	UCRANF	OTHER	PU	15
D2.4	Trusted Data Exchange	WP2	LINKS	OTHER	PU	18
D3.1	Social Characterisation	WP3	VTT	R	PU	12
D3.2	Community Organisation	WP3	UCRANF	R	PU	15
D3.3	Energy Transactive Value	WP3	UPORTO	R	PU	15
D3.4	Technologies Acceptance	WP3	UCC	R	PU	18
D4.1	REC System Components	WP4	POLITO	OTHER	PU	21
D4.2	Agent Aggregation	WP4	UCLM	OTHER	PU	24
D4.3	Simulation and Allocation	WP4	EEU	OTHER	PU	24
D4.4	Economic Viability	WP4	UCLM	OTHER	PU	27
D5.1	Data Monitoring	WP5	AKKO	OTHER	PU	21
D5.2	Performance Analysis	WP5	POLITO	OTHER	PU	24
D5.3	Maintenance Services	WP5	DOMX	OTHER	PU	24
D5.4	Energy Credits Platform	WP5	UPORTO	OTHER	PU	27
D6.1	Energy Credits Market	WP6	UPORTO	OTHER	PU	21

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DELIVERABLE	TITLE	WP	LEAD BENEFICIARY	TYPE	DISSEMI-NATION LEVEL	DUE DATE (MONTH)
D6.2	Explicit Flexibility	WP6	VITO	R	PU	24
D6.3	Implicit Incentive Schemes	WP6	UCLM	R	PU	24
D6.4	System Integration	WP6	VITO	R	PU	27
D7.1	DEMOs quality evaluation	WP7	UPORTO	R	PU	42
D7.2	SSH inputs to DEMOs	WP7	UCC	R	PU	39
D7.3	DEMO in Portugal	WP7	UPORTO	R	PU	39
D7.4	DEMO in Greece	WP7	CLUBE	R	PU	39
D7.5	DEMO in Ireland	WP7	DINGLE	R	PU	39
D7.6	DEMO in Belgium	WP7	VITO	R	PU	39
D7.7	DEMO in UK	WP7	ECORBY	R	PU	39
D7.8	DEMO in Italy	WP7	POLITO	R	PU	39
D7.9	Replication Plan	WP7	CLUBE	R	PU	42
D7.10	Business Plan	WP7	ECORBY	R	SEN	42
D8.1	D&C Plan	WP8	EEU	R	PU	3
D8.2	D&C Plan Update M24	WP8	EEU	R	PU	24
D8.3	Exploitation Plan	WP8	EIMV	R	PU	42
D8.4	Recommendations	WP8	VITO	R	PU	42
D8.5	Final D&C activities	WP8	EEU	R	PU	42
D9.1	Project Management Plan	WP9	UPORTO	R	PU	3
D9.2	Project Management Plan Update M24	WP9	UPORTO	R	PU	24
D9.3	Project Management Plan Update M42	WP9	UPORTO	R	PU	42
D9.4	Data Management Plan	WP9	UPORTO	DMP	PU	6
D9.5	Cooperation activities	WP9	UPORTO	R	PU	24
D9.6	Progress report	WP9	UPORTO	R	PU	14

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Overall Structure of the Work Plan

As illustrated in Figure 1, the **INNO-TREC** work plan proposes a series of 9 logical and interrelated WPs over 42 months, designed to meet the project's Specific Objectives (SO1–SO9) and to enable a clear path towards scalability and replicability through user-driven interaction, integration, deployment, validation, and assessment of the developed tools and platforms.

Work Package structure and description of WPs

The **INNO-TREC** work plan is organised into the following WPs:

- **WP1 – Overall Reference Architecture and Requirements:** establishes the reference architecture and requirements for cross-sector data exchange in RECs, including platform federation and interoperability principles. This WP produces, among others, the deliverables on the EU landscape, the cross-sector approach, the federation of platforms, and the overall reference architecture (D1.1–D1.4).
- **WP2 – Data Gathering, Processing and Security**: develops the data management infrastructure, integrates heterogeneous IoT data, implements the AI-driven DSS (with hierarchical control), and ensures trusted data exchange using DLT and security monitoring (D2.1–D2.4).
- **WP3 – Community Engagement and Social Innovation**: addresses behavioural characterisation, readiness for adoption, inclusive governance, participatory decision-making (especially for vulnerable groups), and co-creation of solutions adapted to each REC socio-cultural context (D3.1–D3.4).
- **WP4 – Design and Simulation Tools for Communities**: develops web-based tools to model REC components and users, simulate energy flows, and assess economic viability indicators (including sizing, sensitivity, and risk analyses) (D4.1–D4.4).
- **WP5 – Operation and Maintenance Tools for Communities**: develops web-based tools to support the operation and maintenance of RECs, including monitoring of PV/demand/storage flows, performance indicators, and corrective/predictive maintenance, with outputs feeding the energy credits platform and market layers (D5.1–D5.4).
- **WP6 – Energy Credits Market, Flexibility and Incentives**: designs the internal energy credits market and connects it with flexibility mechanisms and incentive schemes, ensuring alignment with existing markets and supporting the profitability of PV-based RECs through coupled internal/external value streams.
- **WP7 – DEMO Activities, SSH Intertwining and Business Innovation**: validates the integrated solution through **6 REC demonstration sites in 6 countries** and consolidates replication/scalability analysis and business planning (e.g., D7.3–D7.8 DEMO reports; D7.9 Replication Plan; D7.10 Business Plan).
- **WP8 – Dissemination, Exploitation and Communication**: ensures communication, dissemination, exploitation and stakeholder engagement throughout the project lifecycle.
- **WP9 – Project Management and Coordination**: provides transversal coordination, quality assurance, risk management, ethics/data protection technical robustness, reporting, and cooperation activities (including D9.1 PMP with Gantt/WBS and subsequent updates).

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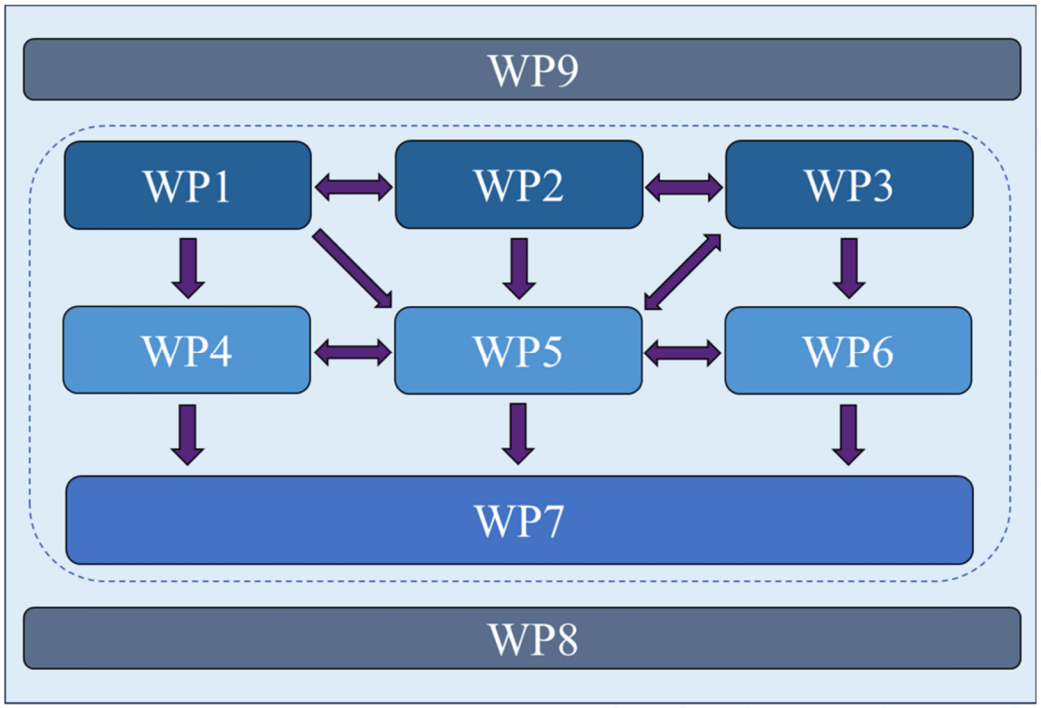

*Figure 1 - **INNO-TREC** work plan organised into 9 mutually connected WPs.*

Project phases and Person-Month (PM) distribution

INNO-TREC is implemented through **three well-balanced phases**, plus a dedicated transversal effort for dissemination/exploitation/communication (WP8) and management (WP9):

- **Phase 1 (M1–M18) – 173 PMs**: **WP1** (Overall Reference Architecture and Requirements), **WP2** (Data Gathering, Processing and Security), **WP3** (Community Engagement and Social Innovation).
- **Phase 2 (M10–M27) – 173 PMs**: **WP4** (Design and Simulation Tools for Communities), **WP5** (Operation and Maintenance Tools for Communities), **WP6** (Energy Credits Market, Flexibility and Incentives).
- **Phase 3 (M13–M42) – 140 PMs**: **WP7** (DEMO validation with 6 RECs, scalability/replicability, go-to-market strategy, and Business Plan, with SSH intertwining).

Additionally:

- **WP8 – 40 PMs** for Dissemination, Exploitation and Communication.
- **WP9 – 40 PMs** for Project Management and Coordination.

Although the three phases overlap in time, **INNO-TREC** uses internal phase reviews as "gates" to confirm readiness to move to the next stage. Each gate is coordinated by the **Project Coordinator (PCO)** at UPORTO, with inputs from the Technical Coordinator (TEC) at Cleanwatts Digital SA (CWD), WP Leaders, and DEMO leaders. Evidence is taken from the status of key deliverables/milestones, continuous reporting records, updated risks and mitigation actions, and (where relevant) ethics/data-protection readiness for DEMO activities. Gate outcomes are documented in meeting minutes and translated into an action list (corrective measures, owners and deadlines) and, when required, updated planning.

The gate criteria are summarised as follows:

- End of Phase 1, target M18: Phase 1 technical foundations are stable (reference architecture and requirements, secure data pipeline and initial engagement framework), and key Phase-1 deliverables are completed or accepted; interfaces needed by Phase 2 tool development are baselined.
- End of Phase 2, target M27: Core design/simulation, operation/maintenance and market/flexibility components reach an integrated baseline; DEMO deployment plans and integration test activities are agreed; risks affecting DEMO rollout are reviewed and mitigations assigned.
- End of Phase 3 / project closure, M42: DEMO validation is completed and consolidated; replication and business planning outputs are finalised; periodic reporting package is ready for submission (technical + financial), and lessons learned are captured for exploitation and replication.

Timing of WPs and inter-relation view

Figure 2 presents the Gantt chart detailing the timing of WPs and tasks across months M1–M42, including the mapping of milestones and deliverables per task/WP (e.g., WP1 tasks and D1.1–D1.4; WP2 tasks and D2.1–D2.4; WP3 tasks and D3.1–D3.4, etc.). In addition, Figure 3 shows a PERT-style graphical representation of how components inter-relate (i.e., dependencies and logical flow between WPs/tasks), complementing the Gantt view to emphasise integration and sequencing towards deployment and validation.

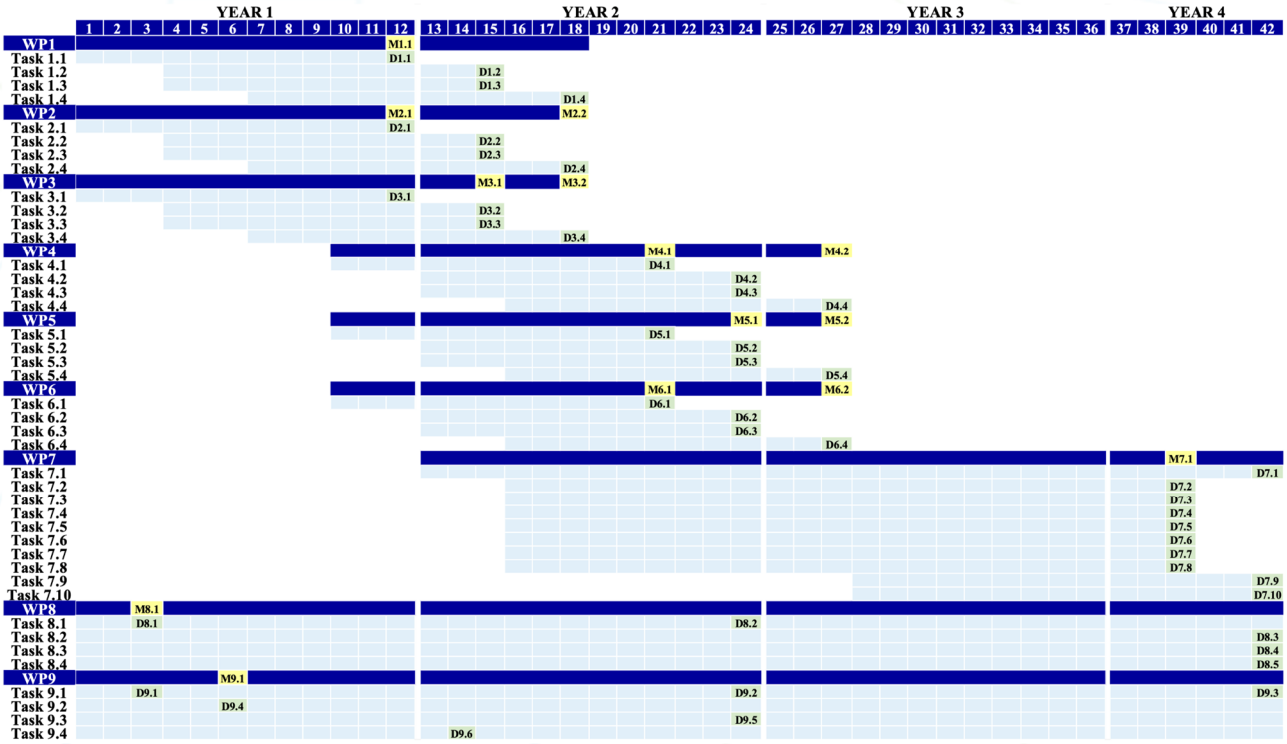

Figure 2 - Timing of the different Work Packages and their components.

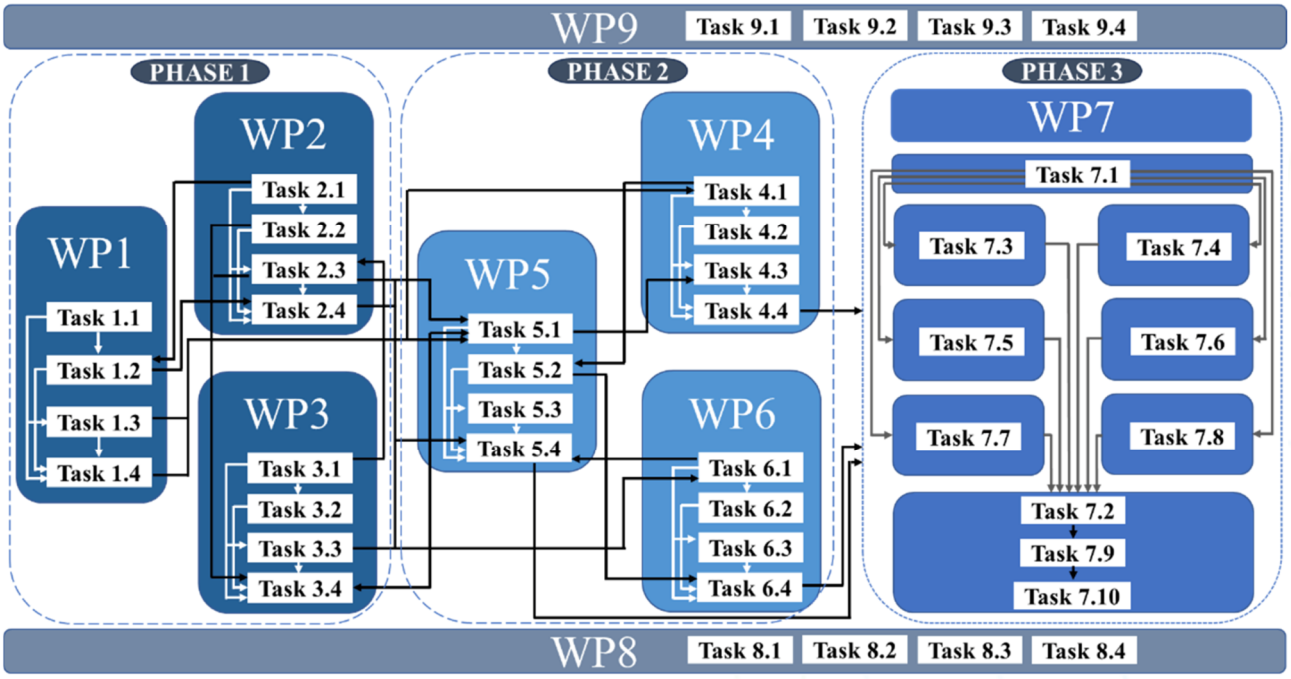

Figure 3 - Graphical presentation of the components showing how they interrelate.

Organisational Structure

INNO-TREC is delivered by a broad, cross-disciplinary consortium that combines research, technology providers, and community actors to accelerate the development of a new generation of **efficient, inclusive, and sustainable RECs**. The partnership includes **20 beneficiaries** and **2 affiliated entities**, spanning **10 countries**, and is coordinated by **UPORTO**. The project's solutions are validated through **six REC DEMOs across six countries (Portugal, Greece, Belgium, Ireland, the UK, and Italy)**, selected to cover different REC typologies, asset mixes and user contexts. By deliberately spreading demonstrations across **multiple climatic conditions and geographic regions**, **INNO-TREC** strengthens representativeness and supports replication across diverse regulatory and societal settings.

To manage this consortium, **INNO-TREC** implements a multi-layer governance model in which the PCO serves as the formal liaison between the consortium and the granting authority, ensuring proper implementation, collecting and quality-checking partner inputs, and submitting deliverables and reports through the EU Funding & Tenders Portal. WP Leaders steer the day-to-day execution within their packages and report progress to the PCO to keep the overall work plan aligned and on schedule. The PCO is supported by four core management bodies and a set of advisory boards, ensuring (i) strategic direction, (ii) effective technical execution across WPs and DEMOs, (iii) exploitation alignment, and (iv) robust administrative/financial management. These **four interacting governance bodies** are:

- **General Assembly (GEA)**: composed of **all project partners**, acting as the main decision-making forum at the consortium level.
- **Executive Board (EXB)**: composed of the **WP leaders**, providing supervisory coordination across WPs and ensuring coherent execution of the work plan.

- **Exploitation and Innovation Board (EIB)**: composed of **stakeholder representatives**, ensuring alignment of project results with exploitation, innovation uptake, and market/replication perspectives.
- **Project Management Office (PMO):** providing operational support for coordination, including administrative and financial management functions.

In addition, **INNO-TREC** has supporting advisory structures:

International Advisory Board (IAB): An external board providing independent feedback on scientific, technical and strategic aspects, with a strong focus on replication and relevance across the Mediterranean Basin. The IAB provides recommendations to support consortium decisions.

Table 3 presents the final composition of the **INNO-TREC** IAB. The PCO maintains contact details for operational purposes.

*Table 3 - **INNO-TREC** International Advisory Board members.*

NAME	COUNTRY
José Luis Malaquias	Portugal
Pablo García–Triviño	Spain
Da Huo	United Kingdom
Ionel Vechiu	France
Marialaura Di Somma	Italy
Michael Galea	Malta
Andrej Gubina	Slovenia
Tomislav Capuder	Croatia
Maja Muftić Dedović	Bosnia and Herzegovina
Martin Ćalasan	Montenegro
Rajmonda Buhaljoti	Albania
Pandelis Biskas	Greece
Mathaios Panteli	Cyprus
Ozan Erdinc	Türkiye
Riad Chedid	Lebanon
Yasser Hegazy	Egypt
Zakreia Hassan	Libya
Ilhem Slama–Belkhodja	Tunisia
Adel Mellit	Algeria
Mohammed Ouassaid	Morocco

IAB engagement is planned through one meeting per year (first meeting targeted for December 2026 / January 2027, then annually). WP-level progress updates will be presented, and recommendations will be recorded. Key cooperation outcomes are consolidated in Deliverable D9.5 (Cooperation activities), while the minutes of advisory board meetings and progress/cumulative expenditure updates are documented in Deliverable D9.6 (Progress report).

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Ethics and Data Protection Advisory Board (EAB): Supports WP9 Task 9.2 by monitoring ethics, user interaction, and data protection aspects, and by advising on compliance with applicable rules for personal data processing in project activities.

Replication Advisory Group (RAG): A dedicated group established to foster replication beyond the consortium. The RAG works closely with WP7 replication activities and with WP8 dissemination/exploitation to maximise the adoption and scalability of project outputs.

Finally, the consortium meetings are co-chaired by the **TEC**, which supports technical alignment across WPs and the six DEMOs, ensuring that integration topics, deployment constraints and validation activities are coherently managed and that issues identified at the DEMO level are communicated to the EXB and the Coordinator. The overall organisational structure of **INNO-TREC** is shown in Figure 4.

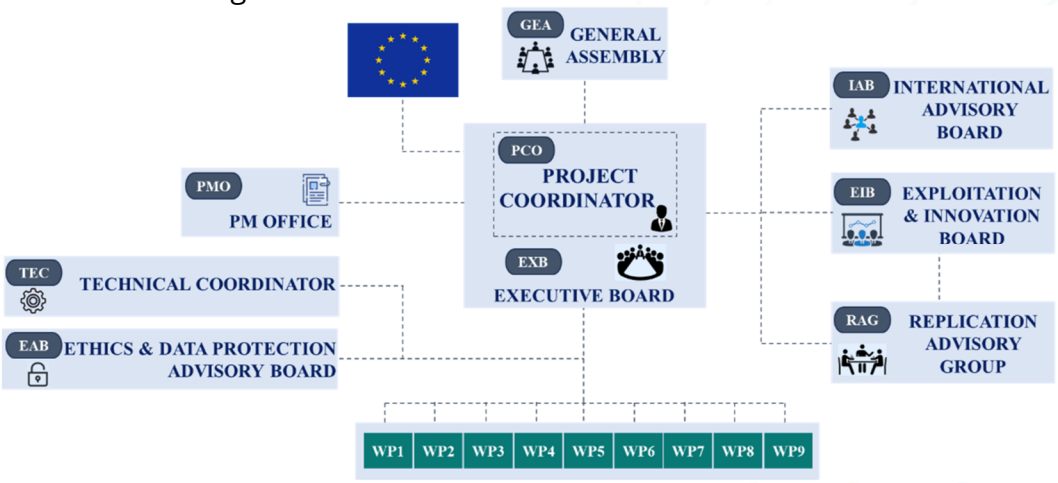

*Figure 4 - Overall organisational structure of **INNO-TREC**.*

Decision-Making, Voting Rules and Quorum

Decision-making procedures (including quorum, voting modalities, veto rights where applicable, and written procedures) are defined in the Consortium Agreement (CA), in line with the internal arrangements required for proper project implementation. This PMP aligns with those arrangements and uses the governance bodies (GEA, EXB, EIB and PMO) as the primary structure for operational and strategic decisions.

Escalation and Monitoring Responsibilities

Implementation monitoring is organised as a layered process. WP Leaders supervise task execution and deliverable preparation within their WPs and promptly report emerging delays, cross-WP impacts or risks to the Coordinator via the EXB. DEMO-related issues and integration constraints are channelled through the TEC to ensure rapid coordination across technical teams and sites. The PMO supports financial and administrative monitoring, including preparing for periodic reporting and following up on internal deadlines.

Escalation follows a pragmatic pathway: issues are first addressed at the task/WP level; cross-WP matters are brought to the EXB; and consortium-wide or strategic decisions are elevated to the GEA. Where events or circumstances are likely to affect or delay implementation, beneficiaries must inform the PCO promptly so that the appropriate corrective actions, reporting steps, and (if necessary) formal amendments through the EU portal tools can be initiated.

Risk Management

Risk management in **INNO-TREC** is approached as a continuous, structured process to **identify**, **prioritise**, and **mitigate** events that may jeopardise the achievement of technical objectives, the timely delivery of outputs, or the compliant implementation of the action. Under **WP9 – Project Management and Coordination**, risk management is treated as a core management function, together with operating procedures, quality assurance and IPR, and it includes the definition and maintenance of **contingency measures that are updated throughout the project lifecycle**.

Some **Critical Risks** were initially captured during grant preparation and constitute the **baseline Risk Register** (RR) (see Table 4) at project start and will be complemented over time as new risks are detected in technical work, demonstrations, stakeholder engagement, or reporting activities. Each risk is associated with the most affected WP(s) and an initial mitigation strategy. During implementation, the consortium will additionally assess and periodically revise each risk's **likelihood** and **impact** to support prioritisation and escalation decisions.

*Table 4 - **INNO-TREC** Risk Register.*

RISK ID	DESCRIPTION	LIKELI-HOOD	SEVERITY	AFFECTED WPS	MITIGATION MEASURES
1	Information required for all data-intensive tasks may not become available promptly.	High	Medium	WP2	Similar data (e.g. from former projects) will be promptly identified and monitored.
2	Energy users' data may not be available in time or detailed enough.	Medium	Medium	WP2, WP3	Upfront alignment between different WPs on data expectations from energy users.
3	Low rate of energy users' involvement in data provision.	Medium	High	WP3	Redundant number and types of energy users, and a continuous search for new ones.
4	Models available may not be sufficient to quantify the impact of user involvement.	Medium	Low	WP3, WP4	**INNO-TREC** has engaged multiple partners with extensive quantitative modelling.
5	The tools to be developed fail to meet user requirements and functionalities.	Low	High	WP4, WP5	The majority of project partners and DEMO leaders are also part of WP4 and WP5.
6	Misalignment between platform development and market models.	Medium	Medium	WP5, WP6	Partners from WP5 are also part of WP6 to ensure alignment between developments.

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RISK ID	DESCRIPTION	LIKELI-HOOD	SEVERITY	AFFECTED WPS	MITIGATION MEASURES
7	Protocol interoperability issues arising from component vendors.	High	Medium	WP7	INNO-TREC is based on widely adopted protocols and APIs to achieve interoperability.
8	Changes in regulations and policies may affect the platform design.	Low	Medium	WP5, WP6	Continuous monitoring of regulations and policies will ensure adaptive development.
9	Business adoption of INNO-TREC results is not as expected.	Medium	Medium	WP8	The Exploitation Plan will be elaborated early and improved continuously.
10	A limited number of relevant stakeholders are involved in the project.	Medium	High	WP8	Contacts with relevant stakeholders will be carried out from the beginning of the project.
11	Low replication and scalability of the project.	Low	High	WP7	INNO-TREC supports upscaling initiatives, including replicability in diverse areas.
12	Low visibility of the project.	Low	Medium	WP8	The team is integrated into extensive networks at local, national and international levels.
13	Partner leaving the INNO-TREC consortium.	Low	High	WP9	Responsibilities will be redistributed among existing partners, or we will look for a new partner.
14	Weak commitment of a partner or lack of coordination between partners.	Medium	Low	WP9	The management structure is defined to cover the lack of commitment and miscommunication.
15	The delay of one WP can affect the others.	Low	Medium	WP9	WP leaders' regular meetings inform all partners of the status of the WPs.

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Monitoring, review cycle, and escalation

INNO-TREC monitors risks through two complementary channels:

1. **Continuous monitoring through project execution and reporting:** Project progress tracking in the Funding & Tenders Portal explicitly covers deliverables, milestones, outputs/outcomes and **critical risks**, enabling timely visibility into issues that may require mitigation or re-planning.
2. **Consortium governance review and corrective action:** Risks are reviewed systematically during consortium coordination activities under WP9, and the RR is updated whenever (i) a new risk is identified, (ii) an existing risk materially changes, or (iii) mitigation actions need adjustment. This includes explicit attention to "cascade risks" where delays in a single WP may propagate to dependent WPs, addressed via regular WP leaders' coordination and schedule oversight.

When a **risk is assessed as requiring escalation**, the PCO will ensure that it is raised to the appropriate governance level (e.g., WP Leaders/Executive Board for cross-WP technical issues, and consortium-wide decision bodies where strategic reallocation or amendment may be needed). To make escalation consistent, internal thresholds will be applied whereby a **risk is escalated if it is assessed as high impact** (e.g., likely to affect critical objectives, DEMO execution, or compliance), **if it is time-critical** (e.g., threatens a deliverable/milestone timeline), **if it becomes cross-WP/cross-DEMO in scope**, or **if mitigation requires management-level decisions** (e.g., budget/person-month redistribution, partner support actions, or changes to responsibilities). Where mitigation requires formal modifications to the GA (e.g., reallocating tasks following a partner's termination), the consortium follows the established amendment procedures under the GA framework.

Overall, this approach ensures that **INNO-TREC** maintains an auditable, regularly updated Risk Register rooted in the GA-defined critical risks, while remaining flexible to incorporate new risks arising from tool integration, user engagement, market/regulatory evolution, and multi-country DEMO deployment.

Quality Management

Quality management in **INNO-TREC** is designed to ensure that all project outputs (deliverables, reports, and supporting materials) are **technically robust, coherent with the Description of Action, compliant with Horizon Europe rules**, and **ready for timely submission** through the EU Funding & Tenders Portal. A rigorous quality approach is explicitly foreseen in the GA, including clear timelines, thorough internal review, and systematic quality checks across WPs.

Under **WP9 – Project Management and Coordination**, quality assurance is embedded in the project's operating procedures and implemented alongside risk management, reporting guidance, and presentation standards. WP9 Task 9.1 also foresees a project management platform to support secure access to documentation, file version control, and consistent use of templates and standards across the consortium.

Roles and responsibilities for quality

Quality is treated as a shared responsibility, with defined roles to ensure both scientific/technical excellence and procedural compliance:

- **Project Coordinator (UPORTO)**: performs the final quality gate before submission, ensuring completeness, internal consistency, formatting compliance, and alignment with GA requirements, and submits official deliverables/reports through the Portal.
- **WP Leaders**: coordinate technical inputs within their WPs, validate that each deliverable meets the WP objectives and interfaces correctly with dependent WPs, and ensure internal deadlines are respected.
- **Task/Deliverable Leaders**: draft and consolidate content, manage versioning, integrate partner contributions, and address reviewers' feedback.
- **Internal reviewers (minimum two)**: provide independent feedback on technical correctness, clarity, and completeness before submission (peer review within the consortium). This reflects the "thorough review processes and quality checks" foreseen for **INNO-TREC** deliverables.
- **Ethics and Data Protection Advisory Board**: supports quality assurance for ethics, user interaction and data protection aligned with WP9 Task 9.2 (ethics, data protection, and robustness).

Deliverable quality workflow and internal schedule

To guarantee predictable quality and timely delivery, **INNO-TREC** adopts an internal deliverable workflow that operationalises the GA's requirement for structured review and quality checks. Each deliverable is expected to progress through the following controlled stages (versions are indicative and support transparent document history):

1. **ToC (v0.1)**: structure agreed; contributions assigned; internal timeline confirmed.
2. **First draft (v0.2)**: content development based on assigned sections and evidence from tasks/activities.
3. **Consolidated (v0.3)**: single integrated version prepared for review (technical completeness check by WP leader).
4. **Revision (v0.4)**: at least **two reviewers** assess technical accuracy, coherence, and readability; comments returned to the deliverable leader.
5. **Release candidate (v0.5)**: edits completed; formatting aligned to project standards; references/figures/tables validated.
6. **Final version (v1.0)**: Coordinator performs final quality control and submits via the Portal.

Table 5 summarises the deliverable life cycle and quality control process. This workflow is supported by the WP9-defined management platform and operating procedures (document control, versioning, and file governance).

Table 5 - Deliverable lifecycle and quality control process.

STAGE	DESCRIPTION	RESPONSIBLE	TIMELINE BEFORE SUBMISSION
1. ToC (v0.1)	Circulation of structure and assigned contributions	WP Leader + Task Leader	≥ 4 weeks
2. First Draft (v0.2)	Consolidated technical content	Task Leader	≥ 3 weeks
3. Consolidated (v0.3)	Complete internal version	WP Leader	≥ 3 weeks
4. Peer Review	Minimum 2 internal reviewers; scientific and language review	Appointed Reviewers	≥ 2 weeks
5. Revision (v0.4)	Incorporation of review comments	Task Leader	≥ 1 week
6. Release Candidate (v0.5)	Final formatting and compliance check	WP Leader	≥ 5 days
7. Final version (v1.0)	Coordinator quality check and submission via Portal	PCO	Submission Day

Content and presentation standards

To ensure that deliverables are consistent and professionally presented, **INNO-TREC** applies common standards across all WPs (templates, formatting rules, and naming conventions maintained in the project repository). At a minimum, each formal deliverable should be self-contained and include: a title page, document metadata (ID, version, dissemination level), document history, acronyms, an executive summary, a table of contents (ToC), main body sections, conclusions, and references (plus appendices, where applicable.

Quality checks focus on:

- **Alignment with the DoA and Annex 1 commitments** (scope, objectives, and expected outputs).
- **Traceability** (clear link between tasks performed and claims made; avoid unsupported statements).
- **Consistency and interoperability** (especially for multi-module/tool deliverables where interfaces are critical).
- **Ethics and data protection compliance**, particularly for DEMO/user-facing activities and data-driven tools.
- **Open science and dissemination readiness**, ensuring that publication and data outputs follow Horizon Europe open access and FAIR-oriented requirements where applicable.

Reporting and submission quality controls

INNO-TREC follows Horizon Europe reporting obligations through:

- **Continuous reporting** (deliverables, milestones, outputs/outcomes, critical risks, indicators) using the Portal's Continuous Reporting tool.
- **Periodic reporting** (technical + financial parts) according to the reporting schedule in the Data Sheet (RP1: M1–M24; RP2: M25–M42), with submission deadlines defined as **60 days after each reporting period**, as summarised in Table 6.

Table 6 - Overview of reporting and payment schedule.

REPORTING TYPE	PERIOD	DEADLINE
Continuous Reporting	Ongoing	Via the Portal tool
Periodic Report 1	M1–M24	60 days after M24
Periodic Report 2	M25–M42	60 days after M42
Interim Payment	After RP1	90 days
Final Payment	After RP2	90 days

Before submission, the PCO verifies that:

- All required inputs from beneficiaries/affiliated entities are complete (including financial statements when relevant),
- The narrative accurately reflects progress and deviations, and
- Materials are submitted through the Portal using the applicable templates and procedures.

Continuous improvement

Quality management is iterative: feedback from internal reviews, advisory boards (notably EAB), DEMO learnings, and periodic reporting cycles is used to refine templates, review practices, and internal schedules. This supports consistent delivery quality across the 42-month action and reduces the risk of late submissions or rework during EC assessment.

Project Communication & Meetings

Effective communication in **INNO-TREC** is organised to (i) keep the consortium aligned across the 9 WPs and 6 DEMOs, (ii) support timely decision-making and risk handling, and (iii) ensure that all formal interactions with the granting authority comply with Horizon Europe requirements. In parallel, **INNO-TREC** establishes coordinated external communication routines to maximise the visibility and uptake of results within the project's dissemination and communication framework.

Communication channels

Regarding **formal communication with the granting authority (EC/Agency)**, all official exchanges are managed electronically through the **EU Funding & Tenders Portal** using its tools, forms, and templates. Communications must be in writing, clearly identify the GA (project number and acronym), and be carried out by authorised persons (including LEAR-designated roles).

The PCO is responsible for the official communication interface between the consortium and the Project Officer (PO). Internally, coordination relies mainly on email (via dedicated mailing lists), complemented by scheduled conference calls and face-to-face or hybrid meetings when beneficial. Telephone calls are primarily used for urgent matters that require immediate clarification.

Internal consortium communication

Day-to-day coordination is supported by:

- **Project management platform** (secure repository, remote storage, and file version control) to centralise working documents, templates, and records.
- Regular email and online meeting tools (teleconferencing/video calls) for WP coordination, DEMO alignment, and management body sessions (details below).
- A structured mechanism to share and escalate implementation issues, consistent with the beneficiaries' duty to promptly communicate events likely to affect or delay the action.

The PCO maintains and regularly updates the consortium mailing lists. Partners should contact the PCO without delay whenever a contact needs to be added or removed to keep information flows complete and consistent. To optimise travel costs, conference calls are used extensively. They should be planned, run against a clear agenda, and conclude with agreed actions and owners.

Meetings: types, frequency, and objectives

INNO-TREC uses a layered meeting structure aligned with its governance bodies (GEA, EXB, EIB, PMO) and advisory boards (EAB, IAB, RAG).

Consortium / Plenary meetings (GEA-level): Consortium meetings are planned **every 6 months** and are **co-chaired by the Technical Coordinator (TEC) and CWD**. These meetings consolidate progress across WPs, review deliverables and upcoming deadlines, discuss cross-WP dependencies, and decide on corrective actions when deviations or risks are detected.

Executive Board – WP Leaders coordination: The EXB (WP leaders) provides ongoing supervisory steering across the work plan. Between plenaries, the EXB organises online coordination sessions as needed to address integration topics, timeline alignment, and emerging risks (particularly where delays in one WP may impact others).

Work Package meetings: Each WP holds periodic technical calls, chaired by the WP Leader, to coordinate tasks, confirm interfaces with dependent WPs, and prepare deliverable drafts and reviews. This operational rhythm supports the WP9 objective of monitoring progress and ensuring timely delivery.

DEMO coordination (WP7 interface): Given the six-country demonstration programme, DEMO-focused coordination meetings are held to align deployment planning, data availability, user engagement activities, and validation protocols across sites (in coordination with the relevant technical WPs).

Ethics and Data Protection Advisory Board: The EAB is convened **every 6 months** to discuss with WP and DEMO leaders issues related to user interactions, data handling, data protection, and the technical robustness of AI-based systems.

International Advisory Board and Replication Advisory Group: INNO-TREC uses the IAB for external strategic feedback and the RAG to support replication planning and scalability pathways.

The operational scheduling for these boards is managed within WP9 planning and aligned with replication and impact milestones.

To support predictable preparation and broad participation in the meetings, **INNO-TREC** applies minimum notice and agenda timelines:

- Meeting notice (minimum): GEA 45 calendar days (ordinary) / 15 calendar days (extraordinary); EXB 14 calendar days (ordinary) / 7 calendar days (extraordinary).
- Agenda circulation (minimum): GEA 21 calendar days (ordinary) / 10 calendar days (extraordinary); EXB 7 calendar days.
- Adding agenda items (minimum): GEA 14 calendar days (ordinary) / 7 calendar days (extraordinary); EXB 2 calendar days.
- Minutes: draft minutes are circulated within 10 calendar days; minutes are considered approved if no written objections are received within 15 calendar days after circulation.

Regular WP coordination is organised through monthly conference calls. WP Leaders chair these calls, steer task execution, and track deliverables and dependencies. At least one representative per partner is expected to participate. Where feasible, WPs select a fixed weekday/time to simplify scheduling; additional calls may be arranged when integration steps, milestones, or risks require closer follow-up. The PCO will endeavour to join WP calls whenever cross-WP implications, risks or reporting topics are expected.

To strengthen cross-WP collaboration and accelerate integration, all-partner project meetings are planned on an approximately quarterly basis (every ~3 months). These meetings can be organised as face-to-face or hybrid sessions and are hosted in rotation by different partners. Additional ad hoc meetings to foster cooperation between WPs may be convened when required by technical interfaces, DEMO-readiness activities, or risk-mitigation actions.

Agenda, minutes, and documentation rules

To ensure traceability and continuity:

- Each meeting has a designated chair (depending on the body) who circulates an agenda in advance and coordinates pre-reading material via the project platform.
- Minutes capture decisions, action items, owners, and deadlines, and are archived in the project repository under version control.
- Actions with potential contractual implications (e.g., changes requiring amendments) are channelled through the PCO and, if needed, handled via the Portal's amendment mechanisms.

External communication alignment

External communication activities follow Horizon Europe obligations for **communication, dissemination, and visibility, including the use of the EU emblem and funding acknowledgement, as well as** factually accurate public messaging.

INNO-TREC prepares a **Dissemination and Communication Plan at M3**, covering visual identity (logo, templates, website), online communications (website/social media/newsletters), and outreach materials (infographics, videos), ensuring coherent project visibility throughout the lifetime. To ensure compliance and consistency, partners are encouraged to coordinate with WP8 and the PCO before releasing any public communication materials, so that content, branding, and acknowledgements comply with the European Commission's **visibility and funding recognition requirements**. Table 7 provides a concise overview of the main meeting formats used to coordinate **INNO-TREC**, including cadence, chairing responsibilities and the key notice/agenda/minutes rules for the consortium bodies.

Table 7 - Meetings summary.

MEETING TYPE	MAIN OBJECTIVE(S)	EXPECTED FREQUENCY	CHAIRING BODY	NOTICE & AGENDA (MINIMUM)	MINUTES/RECORDS
General Assembly (GEA) – ordinary	Consortium-wide strategic decisions; endorsement of major changes.	As scheduled (typically aligned with plenaries)	GEA Chair / PCO (per CA)	Notice: 45 days Agenda: 21 days Add items: 14 days	Draft within 10 days; approved if no objections within 15 days.
General Assembly (GEA) – extraordinary	Urgent consortium-wide decisions.	As needed	GEA Chair / PCO (per CA)	Notice: 15 days Agenda: 10 days Add items: 7 days	Draft within 10 days; approved if no objections within 15 days.
Executive Board (EXB) – ordinary	Cross-WP alignment; integration steering; schedule and risk control.	As needed (between GEA sessions)	EXB Chair (per CA)	Notice: 14 days Agenda: 7 days Add items: 2 days	Draft within 10 days; approved if no objections within 15 days.
Executive Board (EXB) – extraordinary	Rapid coordination on critical cross-WP issues.	As needed	EXB Chair (per CA)	Notice: 7 days Agenda: as agreed Add items: as agreed.	Draft within 10 days; approved if no objections within 15 days.
WP conference call	Task coordination, deliverable tracking, and dependency management.	At least monthly	WP Leader	Scheduled in advance; agenda and action list shared via WP channels	Action list/minutes stored in project repository

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MEETING TYPE	MAIN OBJECTIVE(S)	EXPECTED FREQUENCY	CHAIRING BODY	NOTICE & AGENDA (MINIMUM)	MINUTES/RECORDS
DEMO coordination (WP7 + DEMO leaders)	Site readiness; deployment planning; data/user alignment; validation protocols.	As needed (DEMO lifecycle)	WP7 Leader (CWD) / DEMO Lead	Planned when possible; aligned with deployment milestones	Minutes/action list archived in the repository
Quarterly project meeting (all partners) – face-to-face/hybrid	Cross-WP exchange; integration decisions; DEMO learnings; collaboration boost.	Every ~3 months	Host partner + PCO/TEC	Announced in advance; agenda circulated ahead of the meeting	Minutes/action list archived in the repository
Ethics & Data Protection Advisory Board (EAB)	Ethics, data protection, user interaction and AI robustness oversight.	Every 6 months	Convened under WP9 Task 9.2 (UPORTO)	By board practice, the agenda was circulated ahead of the session	Minutes recorded and stored
International Advisory Board (IAB)	External feedback and recommendations (Mediterranean-focused advisory).	Yearly	PCO (UPORTO)	By board practice, WP-level updates circulated in advance	Minutes recorded; outcomes reflected in WP9 reporting
Replication Advisory Group (RAG)	Replication and scalability guidance; support for replication planning.	As needed	RAG Chair / WP7	By group practice	Minutes/action list archived in the repository

Project reporting is the mechanism the granting authority uses to monitor INNO-TREC implementation and to decide on payments. For that reason, reporting is treated as a consortium-wide responsibility, since the quality, completeness, and timeliness of the submitted information directly influence both the project's external evaluation and the smooth execution of the GA.

Periodic Reporting

Project reporting is the mechanism the granting authority uses to monitor INNO-TREC implementation and to decide on payments. For that reason, reporting is treated as a consortium-wide responsibility, since the quality, completeness, and timeliness of the submitted information directly influence both the project's external evaluation and the smooth execution of the GA.

Reporting modalities and tools

INNO-TREC follows the Horizon Europe electronic management model, meaning that **all formal submissions and communications are handled through the EU Funding & Tenders Portal**, using the relevant reporting and submission tools.

Reporting is organised in two complementary streams:

- **Continuous reporting**, where the consortium records progress on deliverables, milestones, outputs/outcomes, indicators, and critical risks in the Portal's Continuous Reporting tool (with deliverables submitted via the corresponding portal workflow).
- **Periodic reporting**, which is the formal package used to request payments and includes both a **technical report** and **financial statements** for all beneficiaries/affiliated entities.

Reporting periods and deadlines

INNO-TREC has **two reporting periods** defined in the GA Data Sheet:

- **Reporting Period 1 (RP1): Months 1–24**
  - **Periodic report deadline:** 60 days after the end of RP1
  - **Interim payment deadline:** 90 days from receipt of the periodic report
- **Reporting Period 2 (RP2): Months 25–42**
  - **Periodic report deadline:** 60 days after the end of RP2
  - **Final payment deadline:** 90 days from receipt of the periodic report

In addition, the project is supported by an **initial prefinancing** payment, with a portion retained for the **Mutual Insurance Mechanism (MIM)** as specified in the Data Sheet.

Content of the periodic report

Each periodic report is submitted via the Portal and is composed of:

1) Technical part: A consolidated overview of the action implementation (progress by WP/task, deliverables and milestones status, key achievements, deviations and corrective measures), prepared using the Portal's periodic reporting template.

2) Financial part: Including, for all beneficiaries/affiliated entities:

- Individual and consolidated **financial statements** by budget category,
- Explanations on the use of resources (where required),
- **Certificates on the Financial Statements (CFS)** when applicable.

Responsibilities and internal workflow

UPORTO coordinates the reporting process **as Project Coordinator**, responsible for collecting partners' inputs, verifying completeness and consistency, and submitting the final report package through the Portal.

To ensure a smooth process:

- **Each beneficiary** completes and **electronically signs** its financial statement in the Portal within the internal deadlines set by the PCO, and provides timely inputs to the technical report (WP/task progress, deliverable evidence, issues and mitigation actions).
- **WP Leaders** support the consolidation by validating WP-level progress narratives and ensuring consistency between reported achievements and the work plan commitments.
- The **PCO** performs the final quality gate (content coherence, completeness, compliance with portal requirements) and submits the periodic report to the granting authority.

Financial statements, CFS conditions, and basic compliance rules

Financial reporting is produced in **euros**, in accordance with the GA's conversion rules, and is reported in the **language of the Agreement** unless otherwise agreed with the granting authority.

CFSs are required **only at final payment** if the relevant beneficiary-level threshold is met (standard threshold: requested EU contribution ≥ EUR 430.000,00; a higher threshold may apply for beneficiaries with a systems and processes audit).

Overall, this reporting scheme—continuous reporting for ongoing tracking and two formal periodic reports aligned with payments—provides **INNO-TREC** with a structured framework to demonstrate progress, maintain transparency, and ensure timely payments throughout the project lifecycle.

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Conclusion

INNO-TREC is set to advance the development and real-world validation of innovative digital tools, market mechanisms, and socio-technical approaches that strengthen the performance and long-term sustainability of Renewable Energy Communities. The project brings together a multi-country consortium and will demonstrate and validate its solutions through six REC DEMOs across Europe, supporting scalable and replicable pathways for adoption in diverse contexts.

This PMP establishes the operational foundation for the project's implementation over its 42-month duration. It defines the management and governance structure, reporting and communication procedures, and the quality and risk controls required to ensure that work progresses in a timely, consistent, and compliant manner. In particular, WP9 provides the transversal framework to coordinate partners' actions, monitor progress, manage administrative and financial obligations, and address risks and IPR aspects in alignment with the GA.

Because INNO-TREC operates across multiple workstreams (architecture, data infrastructure, AI/DSS, simulation and operation and maintenance tools, energy credits markets, and large-scale demonstrations), continuous coordination and adaptive management are essential. The project will therefore maintain this PMP as a living reference document, using regular monitoring, consortium governance processes, and the periodic reporting cycles (M1–M24 and M25–M42) to keep management practices aligned with progress and emerging needs.

Ultimately, the management approach described in this PMP supports INNO-TREC's ambition to deliver validated, high-TRL (6–7) outcomes and to maximise impact through dissemination, exploitation, and replication planning—ensuring that project results can be transferred beyond the initial DEMOs and contribute meaningfully to the deployment of effective REC solutions in Europe.

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