Ref. Ares(2024)8524365 - 29/11/2024

PHISHES
PHysically-based Integrated Soil HEalth Simulation platform
Predicting soil health to protect ecosystems

PHISHES Project Handbook

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Disclaimer

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Statement of originality

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How to quote this document?

Jensen, R.A., Murray, A.M., Firus, K., Lener, I., Guyonnet, D. (2024). PHISHES Project Handbook (PHISHES Deliverable 7.1)

Project Acronym: **PHISHES**

Project Full Title: **PHysically-Based Integrated Soil HEalth Simulation platform**

Grant Agreement Number: **Project: 101157438 - HORIZON-MISS-2023-SOIL-01**

Type of Action: **HORIZON-RIA**

Deliverable number	**7.1**
Deliverable name:	PHISHES Project Handbook
Dissemination level:	Public
Type of document:	Report
Deliverable Leader:	Roar Askær Jensen
Delivery due date:	29 November 2024
Actual date of submission:	29 November 2024
Deliverable description:	This deliverable includes a detailed description of the communication aspects, beneficiary representatives, quality assurance, and a management guidebook to be adopted within the project. It is a point of reference to all the managerial aspects of the project.
WP / WP number:	WP7
Lead author(s):	Roar Askær Jensen (DHI), Alexandra Marie Murray (DHI)
Contributors:	Katja Firus (T6), Ilaria Lener (T6), Dominique Guyonnet (BRGM)
Reviewers:	All beneficiaries of the PHISHES project have had a reviewing role.

Version log

Version	Date	Issued by	Description	Summary of changes
1	17.10.2024	Alexandra Murray (DHI)	Initial draft / Outline of document	
2	07.11.2024	Roar Askær Jensen (DHI), Alexandra Murray (DHI), Katja Firus (T6), Ilaria Lener (T6), Dominique Guyonnet (BRGM)	Second draft	Text added to flush out all sections

3	11.11.2024	Roar Askær Jensen (DHI), Alexandra Murray (DHI), Katja Firus (T6), Ilaria Lener (T6), Dominique Guyonnet (BRGM)	Third draft	Draft prepared for review by all project beneficiaries. Beneficiaries comment directly in the document with changes tracked.
4	26.11.2024	Alexandra Murray (DHI), Charlotta Tingberg (SGI), Robert Earon (SGI)	Fourth draft	SGI comments are incorporated, which were made in a separate document (see V3_SGI document). Clarifications made to the text based on SGI comments, with changes tracked.
5	27.11.2024	Alexandra Murray (DHI)	Fifth draft	Changes accepted from comments made during V3 and V4.
6	27.11.2024	Alexandra Murray (DHI)	Formatted draft	Content of V6 and V5 are the same. Presented using the project deliverable template.
7	28.11.2024	Alexandra Murray (DHI)	Formatted draft	Content of V7, V6, and V5 are the same. Presented using the updated project deliverable template.

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Executive Summary

"PHISHES", the project PHysically-based Integrated Soil HEalth Simulation platform, is a cooperation project between 9 European research organizations. It focuses on Physically based Integrated Soil Health Simulation and is financed through the Horizon Europe Mission: Soil deal for Europe.

This project handbook contains all the information related to the project management structure, tasks, responsibilities, procedures at all levels of project implementation focusing on many day-to-day activities. In relation, this document will articulate all the communication means, logistics, and guidelines that will be adopted throughout the life of the project, in addition to the appointment of beneficiary representatives, work packages and tasks' leaders, and other main points of contacts. This document is a management guidebook to be adopted within the PHISHES Project.

The PHISHES project handbook is developed as a living document to be utilized by all beneficiaries to promote cooperation and communication by detailing all the rules, guidelines, and standards of the daily work.

The aim is that all the beneficiaries within the consortium have a unified comprehension of the various procedures and methods to be adopted with the project; hereby ensuring that all project efforts are executed efficiently, coherently and at the highest level of quality.

All the guidelines and rules articulated in this document shall be followed as the mechanisms to be adopted by the project consortium.

Keywords

Handbook, Communication, Management, Quality Assurance, Logistics

List of acronyms and abbreviations

CA	Consortium Agreement
DMP	Data Management Plan
EAB	External Advisory Board
EC	European Commission
GA	Grant Agreement
GLA	General Assembly
PC	Project Coordinator
PCT	Project Coordination Team
PMC	Project Management Committee
PO	Project Officer
QA	Quality Assurance

REA	European Research Executive Agency – European Commission
TL	Task Leader
WP	Work Package
WPL	Work Package Leader

PHISHES Project Handbook

1. Introduction

The PHysically-based Integrated Soil HEalth Simulation platform (PHISHES) project handbook represents a comprehensive and management guidebook to all the frequently asked questions and common issues that are faced during project management. This deliverable articulates the project management structure, tasks, responsibilities, and procedures at all levels of project implementation addressing day-to-day activities.

The objectives of this deliverable are:

- Detailing the general guidelines or framework to manage communication between the beneficiaries within the project consortium.
- Creating a common and unified standard practice to be used for the different elements of the project, e.g., project reports, deliverables, and others through the usage of agreed upon procedures and templates.

The main purpose is to articulate the project management system through developing a document that can be used as a focal point or a point of reference for all the project beneficiaries and can help them when conducting their day-to-day activities and tasks within time and scope. The handbook also defines the main criteria for planning and control of the technical aspects of the project.

The deliverable is prepared in the context of Work Package 7 “Project Coordination and Management” led by DHI. The overall contents of the report is as follows:

- Chapter 2 outlines the key facts of the PHISHES project and inform s where to find the key contractual documents.
- Chapter 3 describes the projects management structure, responsibilities and identifies the various work package leaders.
- Chapter 4 describes the shared collaborative pace: the Project SharePoint site, where shared documents are stored and live documents maintained for the benefits and reference of all project staff. The project SharePoint site is established to minimize the need for emailing documents between the beneficiaries and to enable consistent and easy access to the latest updated documents. This chapter also describes where to find mailing lists and contact details of the various work package leaders and other key contact persons. Furthermore, the chapter outlines the schedule for project meetings and conferences throughout the project period.
- Chapter 5 specifies the guidelines for quality assurance of the project deliverables along with the roles of the project’s External Advisory Board that will provide additional QA.
- Rules form and timelines for internal and external progress reporting and documentation is given in Chapter 6 while Chapter 7 explains the mandatory acknowledgement of the funding from the EU and disclaimers to accompany the beneficiaries’ external communication regarding the Project.
- Finally, Chapter 8 gives guidelines on the dissemination of the project results particularly the need for stakeholder approval before dissemination of results and data related to the project test cases.

2. PHISHES Project Information

Project Factsheet

Project Number	101157438
Project Name	PHysically-Based Integrated Soil HEalth Simulation platform
Project Duration	01.09.2024 – 31.08.2028 (48 months)
Budget	6,090,925 Euro
EU Contribution	6,090,925 Euro (100%)
Call ID	Call: HORIZON-MISS-2023-SOIL-01 Topic: 02 Granting authority: REA
Funding Scheme	HORIZON Research and Innovation Action

Contractual Framework

The PHISHES contractual framework is composed of the following contractual documents, a grant agreement (GA) and a consortium agreement (CA). Both files available at the PHISHES group SharePoint site (described in Section 4 Internal Communication) and prevail, in case of contradictions, any items described in this document.

3. Management Structure

The PHISHES project management structure has been constructed to ensure the successful implementation of the project and that all the deliverables of the project are reached on time, within budget, and according to the scope. It is a top to bottom management structure where a general assembly of all partners represents the highest decision-making body in the project. Furthermore, the project has an entire work package (WP) dedicated to coordination and management of the project. The project is divided into 6 further work packages, where each work package has a leader that reports back to the general assembly and coordinates the implementation of all the tasks designated to his/her WP, as well as the delivery all the deliverables at highest quality. The project coordination team (PCT) from WP7 and work package leaders (WPL) and task leaders (TL) together see through the implementation of all project tasks. The PHISHES management structure is presented in Figure 1.

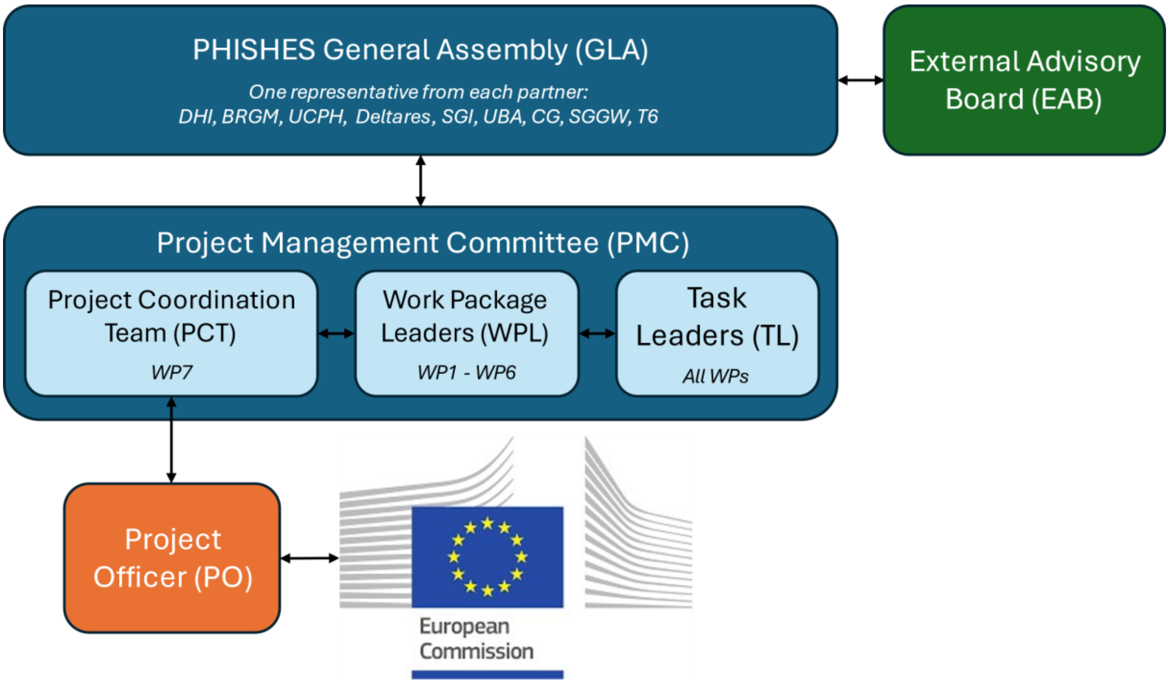

Figure 1 PHISHES Management Structure

The General Assembly, Project Management Committee, and Project Officer elements of the PHISHES management structure shown in Figure 1 are described in this section. The External Advisory Board is described in Section 5 Quality Assurance Guidelines.

General Assembly

The general assembly (GLA) is the ultimate decision-making body of the project and is the representative voice of the consortium. Chaired by the Project coordinator, it is composed of one (high-level) representative of each partner where each gets one vote for decision-making.

The responsibilities of the GLA are described in detail in the CA. They cover:

- Issues regarding content, finances, and intellectual property rights
- Proposals for changes in the grant agreement
- Changes to the consortium plan
- Modifications or withdrawal of Background defined in the CA
- Additions to Attachment 3 (List of Third Parties for simplified transfer according to Section 8.3.2 of the CA) of the CA

- Additions to Attachment 4 (Identified entities under the same control) of the CA.
- Resolving disputes between two or more parties about dissemination of the project results
- Entry of a new party in the project and approval of the settlement on the conditions of the accession of such a new party
- Withdrawal of a party from the project and approval of the settlement on the conditions of the withdrawal
- Identification of a breach by a party of its obligations under the CA or the GA
- Declaration of a party to be a defaulting party
- Remedies to be performed by a defaulting party
- Termination of a defaulting party's participation in the project and measures relating thereto
- Proposal to the granting authority for a change of the coordinator
- Proposal to the granting authority for suspension of all or part of the Project
- Proposal to the granting authority for termination of the project and the CA

If the GLA deems a decision or change to be substantial enough to warrant an update of the project handbook, this update will be performed by the PCT.

The project beneficiaries appoint the staff that participate in the roles defined in the management structure diagram and general implementation of the PHISHES project. The CA and GA regulate handling of disputes regarding a beneficiary's capacity to perform its obligations – as a first step, disputes are handled by the GLA.

Project Officer

The Project Officer (PO) is the main contact point between the consortium and the granting authority (the European Commission) where all the managerial, financial, and scientific matters are communicated to the consortium through him/her. The current contact information for the PHISHES PO can be found in the Contacts folder in the project SharePoint site.

PHISHES should communicate with the PO solely through the project coordinator (PC).

Project Management Committee

The Project Management Committee (PMC) takes care of the different coordination and managerial aspects related to the project. They jointly steer project resources to deliver all the deliverables on time, within budget, and at the highest quality possible. The quality review duties of the project members are detailed in Section 5 of this document, and the management duties are described in this section.

For PHISHES, the PMC is comprised of the Project Coordination Team (PCT), the Work Package Leaders (WPL) and the Task Leaders (TL).

The PCT is composed of members of the team in WP7. The WPL for WP7 is the Project Coordinator. The PCT addresses the following:

- Implementing and maintaining efficient management structures and procedures defined at the proposal stage and in contractual terms (Grant and Consortium Agreements) to successfully steer the project at strategic and operational levels, maintaining continuous dialogue with the European Commission (EC), and ensuring collaboration with relevant projects and initiatives.
- Enabling effective internal communication and decision-making within the consortium, based on a constructive working environment, adequate formal communication channels and timely, well organised, and effective meetings and activities.

- Monitoring progress and controlling the quality, ethics and (research, institutional, personal) data issues of the project along with the work plan and its milestones and deliverables, including managing risks, anticipating and resolving challenges, and ensuring timely and precise financial reporting. Risks and challenges identified by the PCT are raised at GLA meetings, where decisions on actions are taken.

The PCT is composed of the following persons:

Table 1. Composition of the Project Coordination Team

No.	Name	Role	Beneficiary / Partner
1	Jan Kwiatkowski	Project Coordinator	DHI
2	Roar Askær Jensen	Deputy Project Coordinator	DHI
3	Alexandra Murray	Deputy Project Coordinator	DHI
4	Hanne Bertelsen	Management Team	DHI
5	Katja Firus	Management Team	T6
6	Ilaria Lener	Management Team	T6
7	Dominique Guyonnet	Management Team	BRGM

The Project Management Committee (PMC) is further comprised of the Work Package Leaders (WPLs) for work packages 1 through 6, and the Task Leaders (TL) for all work packages. WPLs have been nominated by the corresponding beneficiaries responsible for the WP. Each WPL will coordinate the relevant activities with the support of the Task Leaders (TLs) within the scope of the relevant WP. WPLs will continuously monitor the performance and progress of the WP with respect to the project plan. The WPL will ensure that the horizontal information flows to other WPLs and reports to the PCT and GA. Correspondingly, each TL reports to the associated WPL, coordinates the technical work for the task/activity according to the project and WP objectives, and assists in the preparation of reports.

Each WPL will undertake the following responsibilities:

- Technical planning in the relevant WP, and ensuring results fit the expected outcomes.
- Clearly defining the responsibilities and tasks of the implementation team.
- Identifying and reporting to the PCT about the main risks associated with the different phases of the project. (See Continuous Reporting in Section 6)
- Regularly monitoring the development of the tasks.

The WP leaders are identified as follows:

Table 2. Names and affiliations of the Work Package Leaders

WP No.	WP Title	Leader Name	Beneficiary / Partner
WP1	PHISHES Digital Platform	Torsten Jacobsen	DHI

WP No.	WP Title	Leader Name	Beneficiary / Partner
WP2	Impact of land use management on fate and transport of contaminant in soils	Nicolas Devau	BRGM
WP3	Response of soil ecosystem functions/services to soil contamination	Bjarne W. Strobel	UCPH
WP4	PHISHES test cases	Evzen Zeman	CG
WP5	From healthy-soil land-use scenarios to management choices	Annemieke Marsman	Deltares
WP6	Communication, dissemination and exploitation	Katja Firus	T6
WP7	Project coordination and management (this is the PCT)	Roar Askær Jensen	DHI

Contact information for the work package leaders is found in the Contacts folder on the project SharePoint site and will be updated if any changes are made during the course of the project.

4. Internal Communication

Project Collaborative Space (the SharePoint site)

The main document sharing space for project collaboration in PHISHES is a SharePoint site. The SharePoint site is hosted by DHI, and all other project beneficiaries have access as external guest users.

The structure of the internal drive is as shown in Figure 2.

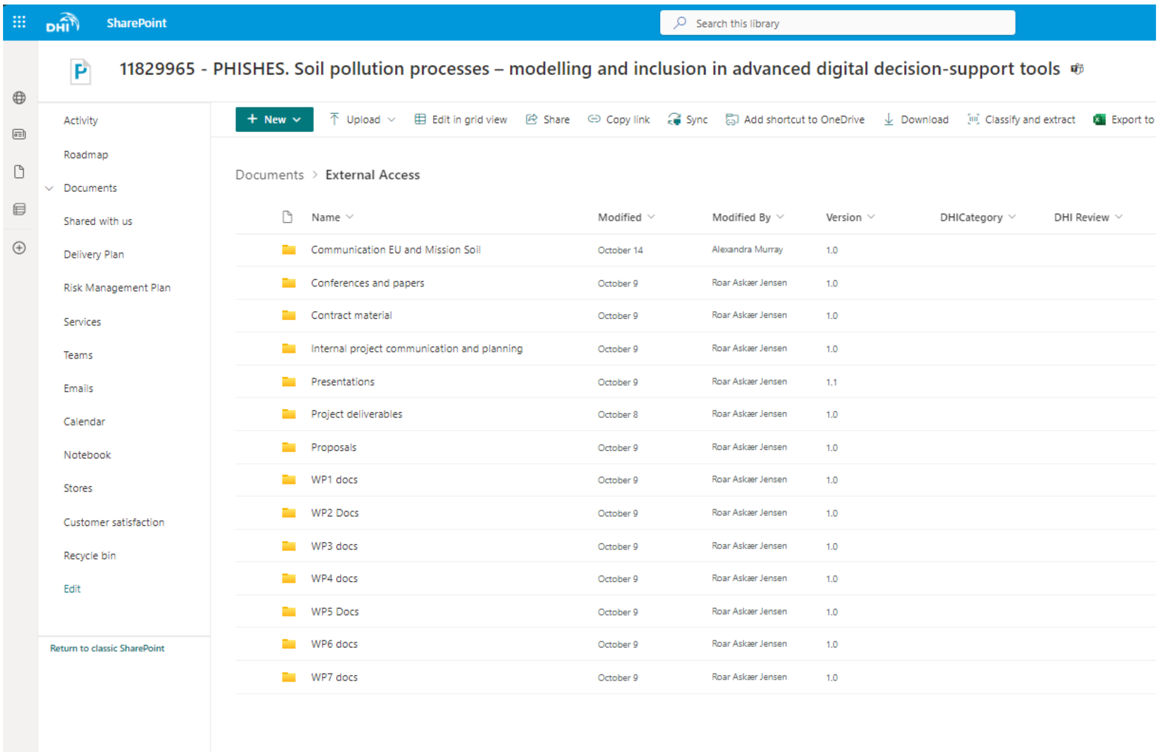

Figure 2 Directory structure of the PHISHES project SharePoint site

The folders included and their intended uses are as follows, where text in boldface are the folder names:

- **Communication EU and Mission Soil**: for all documents that are to be shared externally with EU entities.
- **Conferences and papers**: for tracking scientific, technical documents, such as conference abstracts, conference presentations, and submitted scientific articles.
- **Contract Material**: for agreements at the consortium level. The CA and GA are found here.
- **Internal project communication and planning**: for documents that are relevant for more than one work package. Documents in this folder are not intended for audiences beyond the project beneficiaries. Sub-folders include:
    - **Contacts**
    - **Document exchange between WPs**
    - **Meetings and minutes**
    - **Project Calendar**
    - **Status and progress**
- **Presentations**: a repository for presentations about various aspects of the PHISHES project.

- **Project deliverables**: for dedicated project deliverable documents. Sub-folders include:
  - **Draft project deliverables**: to be used for drafts of project deliverables. Deliverable reviewers can find the draft to review here.
  - **Final project deliverables**: the version of the deliverable that has been submitted to the EU.
- **Proposals**: for the PHISHES proposal documents
- **WP1 – WP7 docs**: a central place for document storage for each WP

All files stored on the SharePoint are in principle available to all project beneficiaries. In the CA, in Chapter 9 and in Attachment 1, there are some types of data, know-how, and information that are subject to specific limitations. These limitations fall under two broad categories: restrictions for implementation and restrictions for exploitation. Broadly, this describes the limitations within and outside of the project. These restrictions include, for example, that unpublished data should not be shared or used by the project beneficiaries beyond the project activities (only to be used during project implementation). Any changes to the agreed upon restrictions to sharing data must be approved by the GLA.

Project Mailing List

A contact document for the project is found in Internal Project Communication and Planning / Contacts. This document is called “Contact Details.xlsx” and will be updated as needed throughout the project.

This document contains the following contact lists:

- The contact information for each beneficiary representative (GLA)
- The contact information for each WPL
- The contact information for all members of the PCT
- A full list of all project members that have been identified by each project beneficiary

The Contacts folder on the project SharePoint site also contains the contact information for the PO and EAB, though they are not included as mailing lists

Project Meetings and Conferences

As per the project proposal, it is agreed that there will be a physical kick-off meeting and four physical regular project meetings of the GLA, PCT, and WPLs, to total 5 meetings.

The kick-off meeting was held at the DHI premises in Denmark on 24-26 September, 2024. The project meetings to take place during the project will be hosted by CG, Deltares, UCPH, and BRGM. The meeting dates and locations will be planned during the regular online meetings of the GLA and PMC.

In addition, there are three review meetings and two conferences planned.

The review meetings are further described in Section 6.

The conferences are as follows:

- One final conference for presentation to the scientific community, and
- One conference to present project findings that targets an audience of the stakeholders associated with the sites in WP4 (to be determined more definitively during conference planning).

Participation of the project beneficiaries in the conferences and the form (for example physical/hybrid/remote) will be determined by the GLA during planning.

In addition to the physical meetings, the GLA and PMC will meet online as needed at a higher frequency. It is the responsibility of the Project Coordinator to call for and lead these meetings, though the GLA will decide on the frequency needed. During the kick-off meeting, it was decided that the GLA will meet every two weeks until the end of the 2024 calendar year.

An agenda will be developed by the PCT and distributed to all project beneficiaries prior to all meetings of the GLA. Meeting minutes will be recorded by the PCT and distributed to the members of the GLA on the SharePoint site. Meeting minutes will be considered approved by the GLA if, within 15 calendar days after the minutes are posted, there have been no objections. Minutes and meeting recordings and transcripts, where applicable, will be placed on the project SharePoint site in the folder Internal project communication and planning \ Meetings and Minutes.

Further face-to-face meetings might be organised on specific topics or at WP level.

5. Quality Assurance Guidelines

Deliverable production, review, and approval

Deliverables are submitted on the EC Project Portal by the project coordinator (DHI).

Before being submitted, deliverables are checked both for technical accuracy (templates, scope) and scientific quality through an internal procedure of authorisations (Figure 3).

A reviewer will be appointed by the WPL (Work Package Leader) or PCT (Project Coordination Team) for each deliverable. The lead of each project beneficiary may suggest a reviewer.

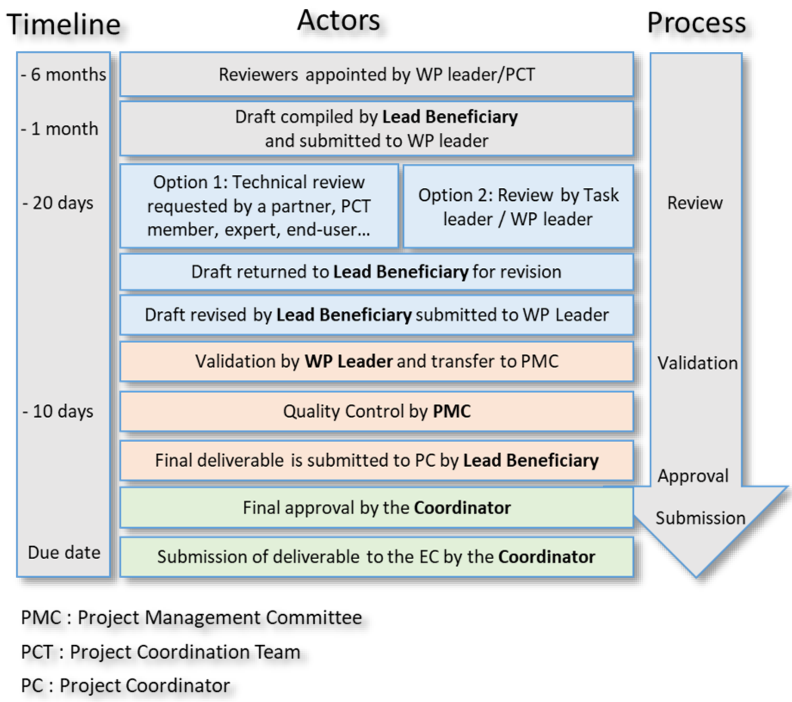

Figure 3 PHISHES internal procedure of deliverable quality control

Metadata regarding deliverables is compiled according to the “PHISHES Deliverable Template”. This template can be found on the project SharePoint site, and details what and how to include copyright information, disclaimers, document history, executive summaries, etc. Beneficiaries should follow the template when writing a deliverable.

Deliverables’ content must fit the expected content described in the GA.

External Advisory Board (EAB)

The PHISHES project management and quality assurance includes an External Advisory Board (EAB) that interacts directly with the Project Management Board.

Composition of the EAB

The EAB is composed of experts in several areas relevant to the PHISHES project. These members are designated intuitu personae with regards to their particular area of expertise and are therefore not directly representing their respective organizations or affiliations. EAB members are typically involved in European or international initiatives aimed at promoting soil health, or key members of European Associations or organizations involved with soil.

The experts comprising the EAB are nominated by the GLA members and contacted by the PC to request their participation. The confirmed and potential EAB members’ contact information, including their names, email addresses and affiliations can be found in the Contacts folder on the project

SharePoint site. This list will be updated to show previous and current EAB members, if the composition of the EAB should change during the PHISHES project lifetime.

Role of the EAB

Members of the EAB are expected to provide advice to the Management Committee regarding, e.g.:

- The relevance of PHISHES activities with respect to the objectives of European Soil Thematic Strategy and MISSION SOIL and to the particular needs of stakeholder groups of which they are aware;
- PHISHES actions to come, in order to increase such relevance;
- The PHISHES innovation management plan;
- The effectiveness of intermediate and final PHISHES results;
- How PHISHES can strengthen visibility among the various European initiatives, avoiding overlap and promoting synergy;
- The dissemination and use of the PHISHES results.

Feedback from the EAB is expected to be communicated to the PC, who will distribute to the GLA and PMC, as necessary. The feedback is expected at two points:

- during/after each annual consortium meeting, where the feedback can be written or verbal (recorded in meeting minutes).
- during deliverable quality review, if Option 1, as shown in Figure 3, is selected in the quality review process, where feedback is returned in written format.

Meetings

EAB members are invited to participate in the GLA meetings that are scheduled to be held once a year (the 1st GLA will be held on in Spring 2025) with remote participation. Ahead of the GLA, the PCT sends EAB members the agenda and a summary of PHISHES progress to-date. Following the meeting, the EAB sends the GLA a document summarizing its recommendations. Further to a meeting between the EAB and the GLA, the latter provides a “Response to the EAB” document. Other informal and ad-hoc advice may be requested from the EAB members should specific needs arise.

Non-disclosure

Members of the EAB are requested to sign a Non-Disclosure Agreement (NDA) prior to their attendance of the 1st MC meeting.

Funding

A budget of 10.000 Euro is available (travel and subsistence) in the event that EAB members are not able to cover these costs.

Non-Disclosure Agreement (NDA)

SURNAME:

FIRST NAMES:

EMPLOYER AND POSITION:

1. I, …………………………………………………….

Hereinafter referred to as the "Receiving Party",

am aware that any information or data (whether oral, written, electronic or other) in any form or nature, hereinafter referred to as the "Confidential Information", conveyed or communicated to me in the course of my participation in the Advisory Board of the PHISHES project, hereinafter referred to as the "Work", are strictly confidential.

2. Consequently, the Receiving Party commits itself to respect the following requests concerning the Confidential Information for a period of five (5) years after the expiration or termination of the Work:

   - to protect the Confidential Information with the same degree of care, but no less than a reasonable degree of care, which the Receiving Party would use to prevent the unauthorized use, uncontrolled dissemination or publication of its own confidential information;
   - to refrain from disclosing the Confidential Information to third parties without prior written approval of the proprietary party;
   - to use the Confidential Information for the sole purpose of the Work.

3. Confidential Information shall not include information that can be shown to be:

a) already known to the Receiving Party at the time of disclosure by the proprietary party;

b) in the public domain other than through a breach of this commitment by the Receiving Party;

c) provided to the Receiving Party by a third party without any restriction on disclosure and without breach of any obligation of confidentiality under this commitment;

d) approved for release by written authorization of the proprietary party;

e) disclosed in order to comply with national laws, regulations or rules in force or with a court or administrative order;

4. The content of this commitment shall be held strictly confidential by the Receiving Party and shall not be disclosed by it without the prior and written agreement of DHI, as coordinator of the PHISHES project.

5. This commitment shall continue in full force and effect for the duration of the PHISHES project consortium agreement starting from the date of its signature by the Receiving Party and may be extended for a further period of time specified by a written amendment. However, the obligations of article 2 shall subside for a period of five (5) additional years after any expiration or termination of this commitment.

6. The Receiving Party undertakes to execute this commitment according to the "*intuitu personae*" principle. Consequently, the Receiving Party is not authorized to transfer all or part of the rights and obligations hereunder to a third party without the prior written agreement of DHI, as coordinator of the PHISHES project.

7. This commitment will be governed and construed in accordance with the laws of Belgium. Any dispute arising out of or relating to this commitment, including any questions regarding its existence, validity

or termination, which cannot be amicably resolved by the Parties within a period of one (1) month of its notification, shall fall within the jurisdiction of the Brussels courts.

Signature:

Date:

6. Reporting and Project Documentation

There are two main types of reporting to the EC required for the PHISHES project. These are continuous reporting (also sometimes called quarterly reporting) and periodic reporting. Figure 4 illustrates how these two reporting processes align with the project lifetime.

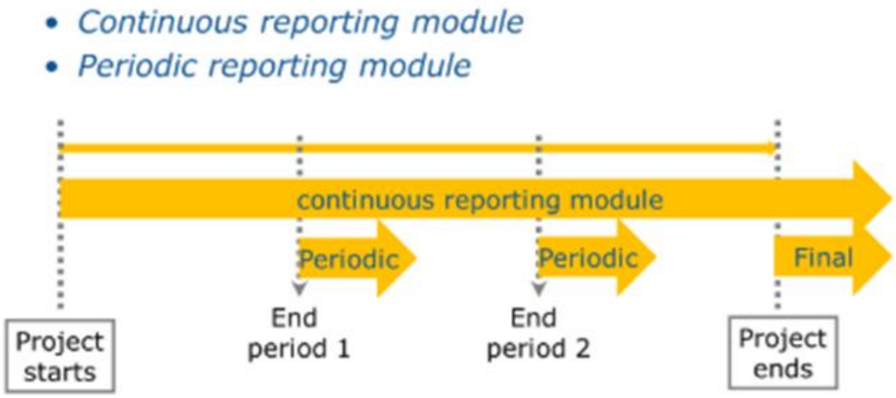

Figure 4 Continuous and period project reporting

Also defined in this section are: periodic project review meetings, financial reviewing and reporting, and documentation of project dissemination activities.

Continuous reporting

Continuous reporting is a type of report where the progress of the actions and project status is updated frequently. This type of report is related to deliverables, milestones, outputs/outcomes, critical risks, indicators, etc.

Continuous reporting contains the following information:

- Regular updates about the status of the project.
- Report on the critical risks, summary for the publication and the programme-specific information on indicators.
- Detailed information about the deliverables and milestones.

Continuous reporting is delivered using the Funding and Tenders Portal – Continuous Reporting tool by the project coordinator.

For the project coordinator to fulfil the EC continuous reporting requirements, internal reporting within the PHISHES project will take place every 3 months. Each WPL will need to communicate the following to the PCT:

- Project implementation status
- Task progress
- Deliverable development
- Risks, problems, limitations faced during the implementation
- Resources used

This quarterly reporting period keeps track of project implementation progress and is the main project status tracking tool. The quarterly reports, as the foundation for the continuous reporting to the EC, are the main reference point that the PCT will use in the quarterly status meetings with the PO.

The quarterly report template can be found in the project SharePoint in the WP7 folder in WP7 docs / Reporting - Quarterly. Each WPL will fill in their respective portion of the template and confirm their completion of the form to the PCT 20 calendar days after the end of each three-month period.

Periodic reporting and payments

The second type of reporting requested by the funding authority is periodic reports. Periodic reports are pre-set in the GA and it was decided to have 3 periodic reports, the first report in M18 (February 2026), the second in M36 (August 2027) and the final report in M48 (August 2028). The main difference between continuous reporting and periodic reporting is that periodic reporting is connected to payments while continuous reporting is not.

Periodic reports are divided into two parts:

1. **Technical Part**

   For the technical part of the report, it is further divided into two parts:

   A. Part A contains the structured tables with project information, summary for publications, critical risks, milestones, etc. (the template will be available in the Funding and Tenders Portal). The PCT is responsible for Part A, and for requesting information from beneficiaries as needed to complete this part of the report.

   B. The narrative Part B mirrors the application form and requires beneficiaries to report on differences, delays, work not implemented, new subcontracts, budget overruns etc. (this is submitted in PDF format – the template will be available in the Funding and Tenders Portal).

2. **Financial Part**

   The financial part of the report includes the following:

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

   The financial statements must detail the eligible costs and contributions for each budget category and for the final payment, also the revenues for the action (see Articles 6 and 22 of the GA). All eligible costs and contributions incurred should be declared, even if they exceed the amounts indicated in the estimated budget (GA - Annex 2 – Project Budget Estimation). Amounts that are not declared in the individual financial statements will not be taken into account by the granting authority. By signing the financial statements (directly in the Portal Periodic Reporting tool), partners confirm that:

   - The information provided is complete, reliable, and true.
   - The costs and contributions declared are eligible (see Article 6 of the GA).
   - The costs and contributions can be substantiated by adequate records and supporting documents (see Article 20 of the GA) that will be produced upon request (see Article 19 of the GA) or in the context of checks, reviews, audits and investigations (see Article 25 of the GA).
   - For the final periodic report: all the revenues have been declared (if required; see Article 22 of the GA).
   - Partners will have to also submit the financial statements of their affiliated entities (if any). In case of recoveries (see Article 22 of the GA), partners will be held responsible also for the financial statements of their affiliated entities.

The technical report Part A and the financial report are generated automatically on the basis of the data in the Grant Management System; the technical report Part B needs to be prepared outside the tools (using the template downloaded from the system) and then uploaded as PDF (together with Annexes, if any). Any additional requests from the EC interrupt the 90 day period. Note that 'days' in this document, and the GA and CA, refer to calendar days.

Table 3. Periodic reporting schedule

No.	Period Report	Due Date	Actions / Upon Approval
1	1st Report: M18	60 days after the end of the reporting period	Interim payment (90 days from receiving the report).
2	2nd Report: M36	60 days after the end of the reporting period	Interim payment (90 days from receiving the report)
3	3rd Report: M48 (final)	60 days after the end of the reporting period	Final payment (90 days from receiving the report)

Review meetings

The PHISHES project has a lifespan of 48 months with three reporting periods in M18, M36, and M48 (see periodic reports 6.2). The review meetings are an in-depth review of progress of workplan implementation and consist of a meeting with the PO and external experts appointed from the EC, during which the project achievements are presented to the panel from the Consortium/GLA. For a review scheduled by the EC during the course of the project, both the coordinator and the beneficiary concerned will participate in the review, and for the reviews already scheduled in the GA, it is expected that all beneficiaries participate. The review meetings outlined in the GA are online meetings.

The review meetings take place on a fixed date, upon agreement with the PO and are usually organized within the 60 calendar days used to submit the periodic reporting or after the above-mentioned deadline. The names of the external reviewers assigned from the EC are communicated to the Consortium GLA well before the review date from the PO. The GLA can accept or reject the experts in case any conflict rises.

The GLA and the PO also agree upon the timeline to approach the review meetings and then provide an advanced draft of the technical report to the reviewers panel, in case the review is fixed within the 60 calendar days used to submit the periodic reporting on the Participant Portal.

It is good practice to organize a rehearsal before the review meeting to get the Consortium/GLA prepared for the review itself. In this sense, the review meetings could be combined with project meetings when necessary.

After the review, the reviewer(s) will send their feedback within 1 month including recommendations or request for clarifications and/or changes to be implemented to see the project outputs accepted.

Financial review and reporting

The PHISHES PMC plans to implement a consistent six-monthly procedure, aiming to assure the correct financial management of project's resources.

The key objectives are the followings:

- maintain correct and continuous financial and administrative information flows between the partners and the PMC;
- support partners in the financial management and reporting of their own project budget;
- maintain accurate consolidated records of occurred costs, allocated resources and timescales;

- ensure that EC contractual rules concerning reporting are respected and official financial reports are prepared on time, accomplishing the contractual obligations.

Accordingly, an internal financial monitoring process is put in place on a six-monthly basis, which is also part of the contractual obligations included in the Consortium Agreement. A list of the financial people concerned involved in the process for each beneficiary is available to the PMC. All partners shall provide the requested financial information in due time, respecting the internal deadlines fixed by the PMC.

Once received, the financial data will be analysed by the PMC with the aim of detecting major deviations, preventing financial issues and ensuring a consistent level of expenditure in relation to the advancement of project activities. In this regard, the financial monitoring process will be conducted using an excel tool collecting both data on the Costs occurred on the different budget headings and the usage of resources (Person Months). **The excel tool template can be found on the project SharePoint and it must be submitted by each partner every six months following instructions of the PMC. The template is located in WP7 docs / Reporting - Financial.**

Deviations that may arise will be discussed internally within the PMC and with the concerned beneficiary in order to put a contingency plan in place, where necessary, and mitigate their impact on the implementation of the activities, to accomplish the full achievement of projects' goals.

Communication, Dissemination and Publication Activity Documentation

For the purpose of collecting information on communication, dissemination and scientific publication activities of all PHISHES partners for the EC Project Portal by one of the PCT members, **three forms have been developed and are stored on the PHISHES SharePoint. Partners have access to these forms through the project SharePoint site in WP7 docs / Reporting - Communications**:

- Reporting Communication Activities PHISHES
- Reporting Dissemination activities PHISHES
- PHISHES publications

All partners must fill in the respective form for each activity separately. This shall be done together with the 3-monthly report (see above).

7. Acknowledgement of EU Support

Acknowledgement of EU funding

Acknowledgement of EU funding is a contractual obligation (Article 17 of the Grant Agreement).

Use of European flag

According to the Grant Agreement (par. 17.2) '...the communication activities of the beneficiaries relating to the action..., dissemination activities... financed by the grant must acknowledge the support of the EU and display the European flag (emblem) and the funding statement (translated into local languages, where appropriate)'.

The European flag (emblem) and the financing statement (translated into local languages, if applicable) should be shown as identified in the following document: https://commission.europa.eu/system/files/2021-05/eu-emblem-rules_en.pdf

One possible use is shown below.

Funded by
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Disclaimer

In addition to the European flag and financing statement (cf. 7.1) the following standard text for inclusion in the acknowledgements of any publication must be used (Grant Agreement (par. 17.3)):

"Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Executive Agency (REA). Neither the European Union nor the granting authority can be held responsible for them."

Acknowledgement in scientific publications

For scientific publications, the following acknowledgement should be used:

[THE AUTHORS] acknowledge funding from Mission Soil "A Soil Deal for Europe" of the Horizon Europe Research and Innovation Programme, under Grant Agreement No. 101157438 (project PHISHES).

8. Guidelines for the dissemination of results and open science

The principles of openness and transparency will underlie all research activities in the PHISHES project, in line with the open science policy and the Horizon Europe guidelines, encouraging the use of the Open Research Europe (ORE) publishing platform and the open repository for research objects. The latest information and guidelines from the European Commission on open science can be found here.

Dissemination of results

All beneficiaries must disseminate their results as soon as feasible, in a publicly available format, subject to any restrictions due to the protection of intellectual property, security rules, or legitimate interests. A beneficiary that intends to disseminate its results must give at least 15 calendar days advance notice to the other beneficiaries (unless agreed otherwise), together with sufficient information on the results it will disseminate. Any other beneficiary may object within (unless agreed otherwise) 15 calendar days of receiving notification, if it can show that its legitimate interests in relation to the results or background would be significantly harmed. In such cases, the results may not be disseminated unless appropriate steps are taken to safeguard those interests. Where the call conditions impose additional dissemination obligations, the beneficiaries must also comply. The PCT can bring dissemination disputes before the GLA, which is obligated to amicably solve disputes, if possible, as per the CA. If no resolution can be found, disputes can be further addressed as per the GA and CA.

The specific dissemination method for any particular result will vary depending on what is appropriate for that result. For detailed information regarding dissemination and exposure of the results of the PHISHES project, please see the Communication and Dissemination Strategy (D6.1), which will be completed in month 6 of the project (February 2025).

Open science, access to scientific publications

All beneficiaries must ensure open access to peer-reviewed scientific publications relating to their results. In particular, it must be ensured that:

- At the latest at the time of publication, a machine-readable electronic copy of the published version or the final peer-reviewed manuscript accepted for publication is deposited in a trusted repository for scientific publications, such as Zenodo.
- Immediate open access is provided to the deposited publication via the repository, under the latest available version of the Creative Commons Attribution International Public Licence (CC BY) or a licence with equivalent rights; for monographs and other long-text formats, the licence may exclude commercial uses and derivative works (e.g. CC BY-NC, CC BY-ND).
- Information is given via the repository about any research output, or any other tools and instruments needed to validate the conclusions of the scientific publication.

Beneficiaries (or authors) must retain sufficient intellectual property rights to comply with the open access requirements.

Metadata of deposited publications must be open under a Creative Common Public Domain Dedication (CC 0) or equivalent, in line with the FAIR principles (in particular machine actionable) and provide information at least about the following:

- publication (author(s), title, date of publication, publication venue)
- Horizon Europe funding; grant project name, acronym and number
- licensing terms
- persistent identifiers for the publication

- the authors involved in the action and their organisations and the grant

Where applicable, the metadata must include persistent identifiers for any research output, or any other tools and instruments needed to validate the conclusions of the publication.

Only publication fees in full open access venues for peer-reviewed scientific publications are eligible for reimbursement.

Open science, research data management

Beneficiaries must manage the digital research data generated in the action ('data') responsibly, in line with the FAIR principles and by taking all of the following actions:

- Establishing a data management plan ('DMP') (and regularly updating it). The PHISHES project DMP is to be developed as a deliverable (D7.2, with further updates in D7.3 and 7.4) due in M6 (February 2025). Advanced versions are planned in M36 and 48.
- As soon as possible and within the deadlines, set out in the DMP, depositing the data in a trusted repository, such as Zenodo.
- As soon as possible and within the deadlines set out in the DMP, ensuring open access - via the repository — to the deposited data, under the latest available version of the Creative Commons Attribution International Public License (CC BY) or Creative Commons Public Domain Dedication (CC 0) or a licence with equivalent rights, following the principle 'as open as possible as closed as necessary', unless providing open access would in particular:
- Be against the beneficiary's legitimate interests, including regarding commercial exploitation, or
- Be contrary to any other constraints, in particular the EU competitive interests or the beneficiary's obligations under this Agreement; if open access is not provided (to some or all data), this must be justified in the DMP.
- Providing information via the repository about any research output or any other tools and instruments needed to re-use or validate the data.

Metadata of deposited data must be open under a Creative Common Public Domain Dedication (CC 0) or equivalent (to the extent legitimate interests or constraints are safeguarded), in line with the FAIR principles (in particular machine-actionable) and provide information at least about the following: datasets (description, date of deposit, author(s), venue and embargo); Horizon Europe funding; grant project name, acronym and number; licensing terms; persistent identifiers for the dataset, the authors involved in the action, and, if possible, for their organisations and the grant. Where applicable, the metadata must include persistent identifiers for related publications and other research outputs.

Before external publication or dissemination of any kind, including scientific dissemination, approval from stakeholders / data owners must be secured. This process is to go through the WPL in particular for data in regard to the PHISHES test cases (work package 4). More information on the process can be found in the DMP.

PHISHES

PHysically-based Integrated Soil HEalth Simulation platform

Predicting soil health to protect ecosystems

For More Information

- Visit PHISHES website: www.phishes-project.eu/
- Follow PHISHES on LinkedIn: www.linkedin.com/company/phishes-project/

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