



# EBENTO

## Project Management Handbook Deliverable 1.1

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## Abstract

Research and development long-term projects carried out by contractors distributed all around Europe, requires a clear definition of the scope of the project and internal coordination mechanisms.

The project management plan defines how the EBENTO project will be executed, monitored and controlled providing a summarized framework of the project and its purpose. The management plans represent the foundations for executing the project, including (i) project work plan together with pert chart and Gantt chart; (ii) work breakdown structure (WBS) detailing tasks, schedule, responsible partners and related deliverables; and (iii) required project efforts in person-months per work package and per task.

Moreover, the project management plan describes the roles of different actors in the project management structure, the meeting schedules and template agendas for meetings and gives guidelines for performing the day-to-day project management activities, including (i) instructions and templates for technical reporting on activity and WP level; (ii) instructions and templates for administrative reports; and (iii) templates and naming/numbering conventions for technical and administrative files and documents

## Keywords

Gantt chart, Work breakdown, Schedule, Task, Deliverables, Project Management

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# 1 Introduction

## 1.1 PURPOSE OF THE DOCUMENT

This document establishes the foundation for the project management processes providing a clear route to success. It covers from a basic description of the scope of the project any party involved in the project should be aware of, to the most detailed description of how the project will be executed, monitored and controlled making it easy to visualize project management timelines.

The project management plan contains all the relevant information to facilitate the execution and control of the different tasks of the project and it may, therefore, be considered key for the overall success of EBENTO. In addition, it will ensure that the consortium meets all the requirements related to the contract with the European Commission (EC), controlling that the tasks start and finish according to the project work plan and that the project deliverables are submitted in due time.

## 1.2 SCOPE OF THE DOCUMENT

Deliverable 1.1 is the first document produced by the EBENTO consortium. It is produced within the Coordination work package (WP1) in order to outline a clear picture of the structure of the project, the work plan and the overall management approach ensuring tasks are completed on time, resources are allocated appropriately, and to help measure project performance.

The document will serve to the team leaders within each organisation, researchers and administrative responsible to have at any moment a clear vision of what and when project's objectives are to be achieved, by showing the list of work packages/tasks, timing, deadlines, responsible partners and resources required for the project execution.

As any other document in the project, but with particular interest to D1.1, this deliverable should not contradict the project contract – and, in particular, the provisions made at the DoA with regards to project schedule and efforts allocated.

The document will be updated at the end of each reporting period (M18 and M36), and the current version already introduces adjustments to the work plan for the current reporting period.

## 1.3 STRUCTURE OF THE DOCUMENT

The document includes a first section describing the modifications from the last Project Management Plan (in this case from the original Description of Action DoA, Annex I of the contract dated 30.08.2022). It continues with a basic summary of the project key facts and expected results. The following sections are specific tools to facilitate the execution and control of the project including project work plan together with PERT chart and Gantt chart, work breakdown structure (WBS) detailing tasks, schedule, responsible partners and related deliverables, and required project efforts in person-months per work package and per task. The Project Management procedures –i.e. reporting, quality



and risk management, communication and dissemination guidelines, etc. – are also part of this deliverable.

## 2 Modifications to the previous Project Management plan

This document includes the information already reported on D1.1 1<sup>st</sup> version in M3 and the modifications from the original Work Plan. These modifications have been proposed and accepted by the Project Management Board (PMB). Some these modifications will be included on the next contract amendment if some. However, for the sake of clarity, the current Project Management Plan already introduce all modifications.

### 2.1 CONSORTIUM

No changes on the consortium had taken place from the previous project management plant.

### 2.2 WORK PLAN

Three Work Package Leaders have requested minor modifications to the timing of some tasks. All the modification do not implied a reduction or change in the work just a modification in time due to the implementation of the project. Following a brief explanation of the changes and reasons:

- **WP2 Performance based-business models** will extend the activities on **T2.1 Preliminary market outlook and business modelling analysis and planning** and **T2.2 Legal and contractual aspects analysis** until M12.

T2.1 extension is needed in order to tackle a more enhanced literature survey and to accommodate a longer preparation time needed for business model survey.

T2.2 extension will allow to continue the legislation analysis through the whole phase 1 of the project (preparation) to better capture the regulatory status just before the start of the phase 2 (development).

The deliverable linked to these two tasks (D2.1) will be delayed to M12.

- **WP3 EBENTO One-stop-shop building performance guarantees and contract definition** will now start in M1 (6 months earlier) ending as planned.

The extension of T3.3 One-stop-shop technical definition will help to early have a basis for the platform to align the activities in T3.1 and T3.2 and show the user a draft of the possibilities they will have with EBENTO OSS. Additionally, the early start will allow a first version of requirements definition to be linked with the use cases defined on T2.3. The rest of activities and tasks of the WP3 will remain without changes.



After the literature review and the market outlook on WP2, the T3.4 should be extended to M24 in order to perform the proper definition of the new contracts and include them on the platform.

Finally to align the work with the correspondent deliverable both D3.1 and D3.2 will be submitted after M18. Being the D3.1 to be reported on M20 to be aligned with the end of the tasks reported in it, T3.1 and T3.2 ended in M20 and T3.3 ended in M18. And D3.2 in M24 to be in accordance with the new deadline of T3.4

- **WP6 EBENTO Impact assessment and replication activities** will now start in M18. The extension will help the early design of the main methodology for evaluation of the impact as well as the KPIs to be used for monitoring the progress of the project running in parallel during 6 months with T2.3 Use Cases definition for industrialized design and production methods. T6.1 Technical impact assessment and verification framework and T6.2 Socio-economic impact assessment will define the methodology to be used and will report it on the first reporting period in order to better align all the project activities. T6.3 Replication potential will remain without changes, starting on M24.

The Work Plan of this document already considers the above-mentioned modifications. Additionally, the following inconsistencies have been detected by the PMB, and have been corrected in section the correspondent section too:

- The partner responsible of T6.2 is now IEECP – instead of JR – in order to match the PM assigned and the responsibilities link with WP2
- The partner responsible of D6.1 is now HYP – instead of IEECP - in order to match the task leader of T6.1.
- Deliverable D6.2 will report the socio-economic impact assessment and the methodology used for both T6.1 and T6.2. The deliverable is responsibility of IEECP who also is leader of the WP6.
- The tasks linked to D3.1 are T3.1, T3.2 and T3.3 as these three defined the technical ecosystem of the platform. D3.2 will be only linked with T3.4 as the aim of the document is to report the development of contracts module to be integrated on the whole OSS.
- The name of D5.1 is now Demonstration activities, citizens engagement plan and platform integration. To include the activities performed on T5.1 that were not reported on any deliverable.
- Deliverable D7.3 will be reported at the end of the project, M36, instead of M26 as it was established as it is the final document with the lessons learned of the project. It was an error on the transcription from M36 to M26.

### 3 Project summary



### 3.1 EBENTO KEY FACTS

**Topic:** HORIZON-CL5-2021-D4-02-01 Demonstrating integrated technology solutions for buildings with performance guarantees (Built4People).

**Type of Action:** Innovation Action.

**Project start:** 1<sup>st</sup> October 2022.

**Duration:** 36 months from **01.10.2022** to **31.9.2025** (Article 3 GA).

**Project Coordinator:** ETRA INVESTIGACIÓN y DESARROLLO S.A.

**Consortium:** 11 organizations from 7 countries

### 3.2 EBENTO IN SHORT

EBENTO (Energy efficiency Building Enhancement through performance guarantee Tools), is an EC funded project led by **ETRA GROUP**, whose goal is to develop an integrated platform for all actors involved in building and renovation sector to provide one-stop-shop to better coordinate and manage Energy Performance Contracting, bringing together the needs from all actors involved in enhancing the building stock.

Through EBENTO, citizens will increase their implication in building energy efficiency enhancement, and both public institutions and energy communities will be able to identify potential energy efficiency improvements in residential housing stock, with SMEs and ESCOs support. Furthermore, with EBENTO platform, new business models for optimizing the financial (and, indirectly, other) resources available will be validated:

- EBENTO will explore the best financing and collaboration schemes to set up energy services.
- EBENTO will study how to enhance current Energy Performance Contracting (EPC) for Demand Side Mechanism (DSM) services and what kind of investment options (grants, loans...) can be implemented to increase the number and impact of energy efficiency projects in the city/region
- By using digital tools, EBENTO will gather data from EPCs, financial schemes and energy savings to give to the citizens the required trust for investing in new solutions, and to companies the relevant information to reduce costs and easily replicate the work developed.

EBENTO will ensure the exchange of relevant information between the different actors, making the renovation process cost-efficient and easy to operate and replicate. The platform will collect data related to performance contracts and guarantees, devices monitoring, energy savings, building information modelling, users' opinions and comfort levels, among others.

The EBENTO results will be evaluated in 4 pilot sites all around Europe in order to test the OSS platform benefits in different ecosystems with specific cultural and legal characteristics to really prove the replication potential of the tool.



EBENTO project is funded by the Research and Innovation Program of the European Commission, Horizon Europe with 4,8 million euros. EBENTO is currently one of the most relevant innovation projects of the European Union in the building renovation sector. 10 partners from 6 European countries and one partner from UK participate. The project started in October 20122 and will have a duration of 3 years.

### 3.3 EBENTO CONSORTIUM AND EXTENDED CONSORTIUM

#### Partners

EBENTO is focused on enhancing the building stock of the European countries by following a people centred approached and involving all the relevant actors. EBENTO consortium comprises 11 partners from 7 different countries. It is composed of a balanced team of complementary organisations including industrial partners, universities, public institutions and cooperatives.

No	Participant organisation name	Country	Short N.	Main Role in EBENTO
1	ETRA Investigación y Desarrollo S.A.	Spain	ETRA	Coordinator. Integration of the OSS platform. ICT tools, real-time awareness, demand response and interfaces.
2	Hypertech	Greece	HYP	Energy algorithms modeler and technical coordinator
3	Tallinna Tehnikaülikool	Estonia	TalTech	Pilot and Demonstration leader
4	Valencia Clima i Energia	Spain	VCE	Pilot and Energy and citizen awareness leader
5	Joanneum Research	Austria	JR	Business Models developers
6	Univerza v Ljubljani	Slovenia	UL	Research partner
7	Institute for innovation and development of University of Ljubljana	Slovenia	IRI UL	People-centred development experts
8	Mytilineos	Greece	MYT	Pilot and Utility
9	The society for the reduction of carbon limited	UK	CCOOP	Pilot and Cooperative
10	Institute for European energy and climate policy stichting	Netherlands	IEECP	Energy Performance Contract experts
11	Centro de estudio de materiales y obra S.A.	Spain	CEMOSA	Facility Manager

Table 1 Partners information

#### Linked third parties



From the beginning of the project one beneficiary has incorporated a Linked Third Parties to the project.

- Institute for innovation and development of University of Ljubljana.

The party is fully integrated in the consortium, participating in its meetings and with a clear allocation of resources as defined in the proposal phase— see section 4.3.2

#### Associated partners

The society for the reduction of carbon limited is part of the consortium as an Associated partner receiving funding from their own resources or national grants.

## 4 EBENTO Workplan

The work plan in EBENTO has been structured in seven Work Packages. The first one, **WP1**, led by ETRA as project coordinator with HYP support as technical Coordinator, **guaranteeing a proper project progress**, assuring the coordination and IPR management of the whole project and keeping the project schedule to guarantee the objectives execution. The **WP2** is dedicate to the **market outlook** and business modelling **analysis and planning** for creating an innovative contractual framework. **WP3** to development the module for managing and store the energy performance contract and guarantees working as a logbook by means of digital tools in addition to **define the technical requirements and architecture** of the whole OSS. **WP4** dedicate to **develop the algorithms** and modules to be integrated on EBENTO platform for the **monitoring** and the **simulation** of energy efficiency enhancements. **WP5** will put together all the modules to creates the EBENTO platform and thus to **demonstrate and evaluate** it in real conditions. **WP6** will **evaluate the technical and socio-economic impact** of the project as well as the replication potential. Finally, **WP7** will setup and coordinate a robust **communication, dissemination and exploitation strategies** guaranteeing outcomes promotion and exploitation among relevant stakeholders, engaging them also for policy making purposes.

Following the agile approach implemented by the project, main rresources are used for involved end-users (mostly citizens) to actively collaborate on the adoption of EBENTO results have been allocated in all relevant tasks. This leads to the involvement of all the stakeholders in all stages of the project with relevant participation of the pilots in the requirements and use cases definition tasks and especially at the demonstration activities.

### 4.1 EBENTO PERT



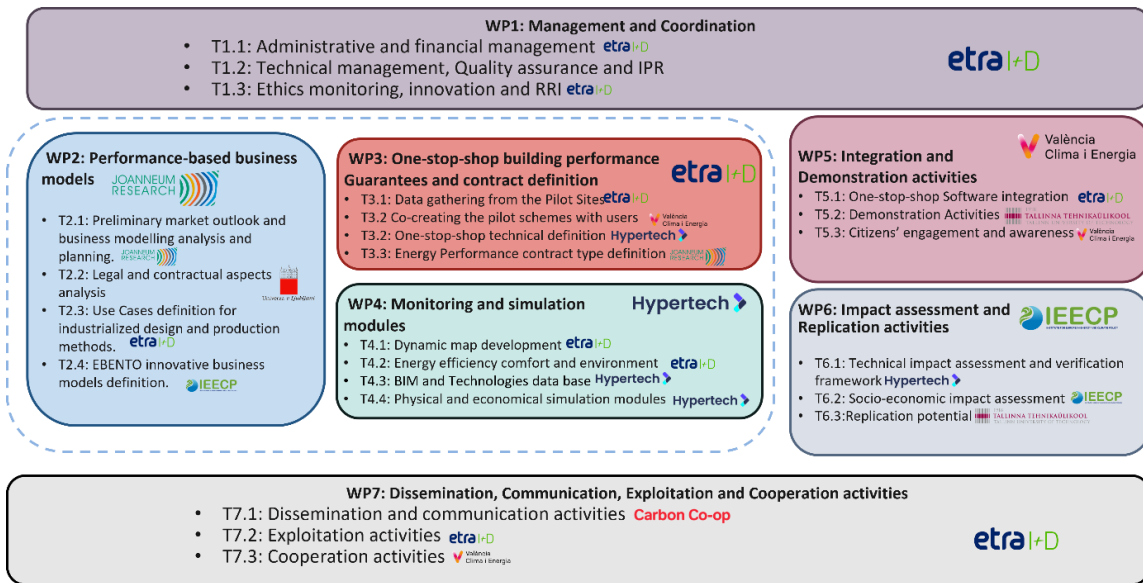


Figure 1 EBENTO PERT



## 4.2 EBENTO GANTT

		oct	nov	dic	ene	feb	mar	abr	may	jun	jul	ago	sep	oct	nov	dic	ene	feb	mar	abr	may	jun	jul	ago	sep													
		M1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12	M13	M14	M15	M16	M17	M18	M19	M20	M21	M22	M23	M24	M25	M26	M27	M28	M29	M30	M31	M32	M33	M34	M35	M36	
<b>WP 1</b>	<b>Management and Coordination</b>						MS1																															
1.1	Administrative and financial management																																					
1.2	Technical management, Quality assurance and IPR			D1.1																																		
1.3	Ethics monitoring, innovation and RRI						D1.2																															
<b>WP 2</b>	<b>Performance-based business models</b>												MS3									MS5			MS7													
2.1	Preliminary market outlook and business modelling analysis and planning.																																					
2.2	Legal and contractual aspects analysis												D2.1																									
2.3	Use Cases definition for industrialized design and production methods.																																					
2.4	EBENTO innovative performance-based and guarantees business models.																																					
<b>WP3</b>	<b>One-stop-shop building performance guarantees and contract definition</b>												MS3											MS6		MS7												
3.1	Data gathering from the Pilot Sites																																					
3.2	Co-creating the pilot schemes with users																																					
3.3	One-stop-shop technical definition																																					
3.4	Energy Performance contract type definition																																					
<b>WP 4</b>	<b>Monitoring and simulation modules</b>																																					
4.1	Dynamic map development																																					
4.2	Energy efficiency comfort and environment																																					
4.3	BIM and Technologies data base																																					
4.4	Physical and economical simulation modules																																					
<b>WP5</b>	<b>Integration and Demonstration activities</b>																																					MS10
5.1	One-stop-shop Software integration																																					
5.2	Demonstration Activities																																					
5.3	Citizens engagement and awareness																																					
<b>WP6</b>	<b>Impact assesment and replication activities</b>																																					
6.1	Technical impact assessment and verification framework																																					MS10
6.2	Socio-economic impact assessment																																					D6.1
6.3	Replication potential																																					D6.2
<b>WP 7</b>	<b>Dissemination, Communication, Exploitation and Cooperation activities</b>																																					D6.3
7.1	Dissemination and communication activities																																					MS10
7.2	Exploitation activities																																					
7.3	Cooperation activities																																					D7.3

Table 2 EBENTO GANTT

## 4.3 WORK BREAKDOWN STRUCTURE (WBS)

### 4.3.1 EBENTO Tasks Breakdown



WP	Task	Start	End	Leader	Involved partners	Related deliverable
1	1.1 Administrative and financial management	Oct 22 [M1]	Sept 25 [M36]	ETRA	ALL	D1.1 Project Management Handbook Dec 22 [M3]
1	1.2 Technical management, Quality assurance and IPR	Oct 22 [M1]	Sept 25 [M36]	HYP	ETRA, JR, IEECP	D1.1 Project Management Handbook Dec 22 [M3]
1	1.3 Ethics monitoring, innovation and RRI	Oct 22 [M1]	Sept 25 [M36]	ETRA	HYP	D1.2 Data Management Plan Mar 23 [M6]
2	2.1 Preliminary market outlook and business modelling analysis and planning.	Oct 22 [M1]	Sep 23 [M12]	JR	ETRA, UL, IRI UL, IEECP	D2.1 Preliminary Business models and market analysis Sep 23 [M12]
2	2.2 Legal and contractual aspects analysis	Oct 22 [M1]	Sep 23 [M12]	UL	JR, UL, IRI UL	D2.1 Preliminary Business models and market analysis Sep 23 [M12]
2	2.3 Use Cases definition for industrialized design and production methods.	Mar 23 [M6]	Mar 24 [M18]	ETRA	ALL	D2.2 EBENTO Use Case definition and innovative business models Sep 24 [M24]
2	2.4 EBENTO innovative performance-based and guarantees business models.	Mar 23 [M6]	Sep 24 [M24]	IEECP	ALL	D2.2 EBENTO Use Case definition and innovative business models Sep 24 [M24]
3	3.1 Data gathering from the Pilot Sites	Jan 23 [M4]	Mar 24 [M20]	ETRA	HYP, VCE, MYT, TalTech, CCOOP	D3.1 One-stop-shop technical definition Mar 24 [M18]
3	3.2 Co-creating the pilot schemes with users	Mar 23 [M6]	Mar 24 [M20]	VCE	ETRA, MYT, TalTech, CCOOP	D3.1 One-stop-shop technical definition Mar 24 [M18]
3	3.3 One-stop-shop technical definition	Oct 22 [M1]	Mar 24 [M18]	HYP	ETRA, IEECP, CEMOSA	D3.1 One-stop-shop technical definition Mar 24 [M18]
3	3.4 Energy Performance contract type definition	May 23 [M8]	Mar 24 [M24]	IEECP	ETRA, JR, UL, IRI UL, VCE, MYT, TalTech, CCOOP	D3.2 Energy performance contract for EBENTO one-stop-shop Mar 24 [M18]



4	4.1 Dynamic map development	May 23 [M8]	May 24 [M20]	ETRA	HYP, CCOOP, CEMOSA	D4.1 Energy efficiency modules development Jul 24 [M22]
4	4.2 Energy efficiency comfort and environment	May 23 [M8]	Jul 24 [M22]	ETRA	HYP, VCE, MYT, TalTech, CCOOP, CEMOSA	D4.1 Energy efficiency modules development Jul 24 [M22]
4	4.3 BIM and Technologies data base	May 23 [M8]	May 24 [M20]	HYP	ETRA, VCE, MYT, TalTech, CCOOP, CEMOSA	D4.2 Simulation modules development Jul 24 [M22]
4	4.4 Physical and economical simulation modules	May 23 [M8]	Jul 24 [M22]	HYP	ETRA, VCE, MYT, TalTech, CCOOP, CEMOSA	D4.2 Simulation modules development Jul 24 [M22]
5	5.1 One-stop-shop Software integration	Jan 24 [M16]	Jul 24 [M22]	ETRA	ALL	D5.1 Demonstration activities and citizens engagement plan Jul 24 [M22]
5	5.2 Demonstration Activities	Jan 24 [M16]	Jun 24 [M33]	TALTECH	ETRA, JR, UL, VCE, MYT, CCOOP, IEECP, CEMOSA	D5.2 Demonstration activities results Jun 24 [M33]
5	5.3 Citizens engagement and awareness	Jan 24 [M16]	Sept 25 [M36]	VCE	ETRA, IRI UL, MYT, TalTech, CCOOP, CEMOSA	D5.3 Citizens' engagement result Sept 25 [M36]
6	6.1 Technical impact assessment and verification framework	Sep 23 [M12]	Sept 25 [M36]	HYP	ETRA, UL, IRI UL, VCE, MYT, TalTech, CCOOP, IEECP, CEMOSA	D6.1 Technical impact assessment Sept 25 [M36]
6	6.2 Socio-economic impact assessment	Sep 23 [M12]	Sept 25 [M36]	IEECP	ETRA, HYP, UL, IRI UL, VCE, MYT, TalTech, CCOOP, IEECP, CEMOSA	D6.2 Socio-economic impact assessment and verification methodology Sept 25 [M36]
6	6.3 Replication potential	Sep 24 [M24]	Sept 25 [M36]	TALTECH	ETRA, VCE, MYT, TalTech, IEECP	D6.3 Replication Handbook Sept 25 [M36]
7	7.1 Dissemination and communication activities	Oct 22 [M1]	Sept 25 [M36]	ETRA	ALL	D7.1 Plan for Exploitation and dissemination of results Sept 25 [M36]
7	7.2 Exploitation activities	Oct 22 [M1]	Sept 25 [M36]	ETRA	ALL	D7.2 Dissemination, Communication and Cooperation activities Report Sept 25 [M36]



7	7.3 Cooperation activities	Oct 22 [M1]	Sept 25 [M36]	CCOOP	ALL	D7.3 Handbook lessons learned Sept 25 [M36]
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### 4.3.2 Project effort in Person-months

Extended PM Breakdown (per task) Table 3 EBENTO tasks, schedule, involved partners and deliverable

	Lead	ETRA	HYP	TalTech	VCE	JR	UL	IRI UL	MYT	CCOOP	IEECP	CEMOSA	TOTAL	
<b>WP 1</b>	<b>Management and Coordination</b>	ETRA	24	12	2	2	4	2	2	2	2	4	2	58
1.1	Administrative and financial management	ETRA	10	2	2	2	2	2	2	2	2	2	2	30
1.2	Technical management, Quality assurance and IPR	HYP	4	7		2					2			15
1.3	Ethics monitoring, innovation and RRI	ETRA	10	3										13
<b>WP 2</b>	<b>Performance-based business models</b>	JR	22	4	4	4	25	23	23	4	4	31	10	154
2.1	Preliminary market outlook and business modelling analysis and planning.	JR	5				8	5	5			5		28
2.2	Legal and contractual aspects analysis	IEECP					2	7	7			10		26
2.3	Use Cases definition for industrialized design and production methods.	ETRA	12	2	2	2	3	5	7	2	2	3		40
2.4	EBENTO innovative performance-based and guarantees business models.	IEECP	5	2	2	2	12	6	4	2	2	13	10	60
<b>WP3</b>	<b>One-stop-shop building performance guarantees and contract definition</b>	ETRA	35	19	10	15	8	7	5	10	10	12	6	137
3.1	Data gathering from the Pilot Sites	ETRA	10	4	3	3				3	3			26
3.2	Co-creating the pilot schemes with users	VCE	5		5	10			5	5				30
3.3	One-stop-shop technical definition	HYP	10	15							2	6		33



3.4	Energy Performance contract type definition	IEECP	10		2	2	8	7	5	2	2	10		48
<b>WP 4</b>	<b>Monitoring and simulation modules</b>	<b>HYP</b>	<b>45</b>	<b>40</b>	<b>6</b>	<b>6</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>6</b>	<b>14</b>	<b>0</b>	<b>8</b>	<b>125</b>
4.1	Dynamic map development	ETRA	15	5							3		2	25
4.2	Energy efficiency comfort and environment	ETRA	15	5	2	2				2	5		1	32
4.3	BIM and Technologies data base	HYP	5	15	2	2				2	4		5	35
4.4	Physical and economical simulation modules	HYP	10	15	2	2				2	2			33
<b>WP5</b>	<b>Integration and Demonstration activities</b>	<b>VCE</b>	<b>30</b>	<b>12</b>	<b>27</b>	<b>29</b>	<b>6</b>	<b>6</b>	<b>8</b>	<b>24</b>	<b>26</b>	<b>5</b>	<b>9</b>	<b>182</b>
5.1	One-stop-shop Software integration	ETRA	15	12	2	2	3	3	3	2	2	3	3	50
5.2	Demonstration Activities	TalTech	11		15	12	3	3		12	12	2	4	74
5.3	Citizens engagement and awareness	VCE	4		10	15			5	10	12		2	58
<b>WP6</b>	<b>Impact assesment and replication activities</b>	<b>IEECP</b>	<b>11</b>	<b>14</b>	<b>12</b>	<b>12</b>	<b>10</b>	<b>8</b>	<b>11</b>	<b>12</b>	<b>14</b>	<b>11</b>	<b>9</b>	<b>124</b>
6.1	Technical impact assessment and verification framework	HYP	5	12	2	2		5	5	2	2	5	5	45
6.2	Socio-economic impact assessment	JR	3	2	5	5	10	3	6	5	5	3	4	51
6.3	Replication potential	VCE	3		5	5				5	7	3		28
<b>WP 7</b>	<b>Dissemination, Communication, Exploitation and Cooperation activities</b>	<b>ETRA</b>	<b>16</b>	<b>6</b>	<b>7</b>	<b>11</b>	<b>9</b>	<b>6</b>	<b>6</b>	<b>8</b>	<b>9</b>	<b>6</b>	<b>10</b>	<b>94</b>
7.1	Dissemination and communication activities	ETRA	7	2	2	2	2	2	2	2	4	2	3	30
7.2	Exploitation activities	ETRA	7	2	2	2	5	2	2	4	2	2	5	35
7.3	Cooperation activities	VCE	2	2	3	7	2	2	2	2	3	2	2	29
<b>TOTAL</b>			<b>183</b>	<b>107</b>	<b>68</b>	<b>79</b>	<b>62</b>	<b>52</b>	<b>55</b>	<b>66</b>	<b>79</b>	<b>69</b>	<b>54</b>	<b>874</b>

Table 4 EBENTO Effort per task and partner

## Summarised PM Breakdown (per Work Package)



Partner	WP1	WP2	WP3	WP4	WP5	WP6	WP7	TOTAL
ETRA	24	22	35	45	30	11	16	<b>183</b>
HYP	12	4	19	40	12	14	6	<b>107</b>
TalTech	2	4	10	6	27	12	7	<b>68</b>
VCE	2	4	15	6	29	12	11	<b>79</b>
JR	4	25	8	0	6	10	9	<b>62</b>
UL	2	23	7	0	6	8	6	<b>52</b>
IRI UL	2	23	5	0	8	11	6	<b>55</b>
MYT	2	4	10	6	24	12	8	<b>66</b>
CCOOP	2	4	10	14	26	14	9	<b>79</b>
IEECP	4	31	12	0	5	11	6	<b>69</b>
CEMOSA	2	10	6	8	9	9	10	<b>54</b>
<b>TOTAL</b>	<b>58</b>	<b>154</b>	<b>137</b>	<b>125</b>	<b>182</b>	<b>124</b>	<b>94</b>	<b>874</b>

Table 5 EBENTO PM breakdown per WP



## 5 Communication guidelines

Communication will normally take place via e-mail or telephone. This section contains a set of best practices to be followed in order to make easier the e-mail communication process.

### 5.1 ELECTRONIC COMMUNICATION

Electronic mail is used extensively by the partners to communicate with each other. It will be used preferably through the mailing list created by the Coordinator (PC).

Based on the list of project participants available at the project repository, and considering the project structure, the following mailing lists have been elaborated:

- EBENTO administrative, financial and coordination contact list, containing all administrative and technical contacts for all partners:
  - [all@ebentoproject.eu](mailto:all@ebentoproject.eu)
- Mailing list per partner:
  - [etraid@ebentoproject.eu](mailto:etraid@ebentoproject.eu)
  - [hypertech@ebentoproject.eu](mailto:hypertech@ebentoproject.eu)
  - [taltech@ebentoproject.eu](mailto:taltech@ebentoproject.eu)
  - [vce@ebentoproject.eu](mailto:vce@ebentoproject.eu)
  - [jr@ebentoproject.eu](mailto:jr@ebentoproject.eu)
  - [ul@ebentoproject.eu](mailto:ul@ebentoproject.eu)
  - [iriul@ebentoproject.eu](mailto:iriul@ebentoproject.eu)
  - [mytilineos@ebentoproject.eu](mailto:mytilineos@ebentoproject.eu)
  - [carboncoop@ebentoproject.eu](mailto:carboncoop@ebentoproject.eu)
  - [ieecp@ebentoproject.eu](mailto:ieecp@ebentoproject.eu)
  - [cemosa@ebentoproject.eu](mailto:cemosa@ebentoproject.eu)

The mailing lists can be updated as needed at any time. The e-mail subject will start with the name of the project. This will be very helpful for easily identifying and classifying the messages.

If required, the consortium will use TEAMS (<https://www.microsoft.com/es-es/microsoft-teams/login>) or WEBEX ([www.webex.com](http://www.webex.com)) teleconference services for ad-hoc meetings as an alternative to face to face meetings. All of them provide several modes of communication regardless of the application used, e.g. chat, voice, message board, data conferencing and file transfer. It can be used in a multiple-user mode so groups can hold online conferences.

#### 5.1.1 Guidelines for Effective Electronic Communication

To reduce the information exchange effort, project information will be exchanged by use of electronic communications. The intention of the guidelines below is to make efficient use of electronic communications in the project, in order to:



- Ensure that all partners get the information they need in a timely manner,
- Avoid e-mail spamming and information overload,
- Minimise travelling costs.

Note: to allow some flexibility however, only the rules in bold are mandatory.

#### General rules:

- **Only relevant information (strictly related to the EBENTO project) is sent to the appropriate project participants, using the relevant mailing list.**
- Each mail will have a specific subject (field "Subject"), with the following elements:
  - **The project acronym (EBENTO).**
  - **The SP-number, preceded with a hyphen "-"**,
  - The subject,

When using the mailing list created by the project, the mandatory pieces of information will be included automatically by the mailing list server.

- **Each mail must contain one topic only.** The topic must be clearly expressed in the subject field.
  - If it is not practical to separate multiple topics, then the different topics in the e-mail must be separated by clear heading. In this case, if the mail is long (more than can be seen on a screen) then it should start with a list of contained topics at the beginning.
- **Communication of relevance to a particular group (such as comments and votes) will be given as group replies** so as to give all group members the opportunity to receive a clear view of every partner's opinion, in an effort to speed up and harmonise the agreement process.
- The e-mails will be answered within two days maximum after the reception of the original mail. If no answer can be provided, a simple acknowledgment of reception will be enough.
- Deadline for definitive reply. In the case of no response to a message within fifteen (15) calendar days, message will be considered as read, and response will be considered as positive.
- e-Mail messages sent in response to a message should quote the relevant parts of the initial message, in such a way that the receiver can easily and clearly understand what the initial message was about (what issues were raised) and what the added comments are.
- **Documents of project-wide relevance are stored the project repository.** They are not generally and necessarily distributed by e-mail to the whole project membership. Project participants are notified by e-mail and invited to consult the documents on the website.

## 5.2 DOCUMENT INTERCHANGE FORMAT

All the text documents exchanged within the project must observe the following rules:

- Format \*.docx/doc (Word or equivalent).
- Track of changes activated.
- After the final document has passed the peer review, the project coordinator submitting the document to the EC will generate the PDF file, properly secured.



- Attachments should not be sent to mailing lists but rather placed on the project repository. Then, the person who has uploaded the document will notify it via e-mail to the appropriate mailing list, announcing the location where the document can be retrieved.
- A logical structure of the repository has been organised in order to facilitate the retrieval of all the documents. All the partners will continue using this structure and create new directories in the same logical way whenever it is needed.
- The presentations will use the \*.pptx/ppt format (or equivalent) according to a template available at the Web site.
- All the documents to be forwarded outside the Consortium, including the presentations and the final deliverables, will use **ONLY PDF format**, properly secured and authorizing only printing, no edition, no copy and no annotation.
- The biannual reports have specific templates.
- The deliverables, interim milestone brief reports and documents must follow the format and styles indicated in the template available in the corresponding section of EBENTO repository.
- These templates can evolve according to the project needs.

### 5.3 DOCUMENT NUMBERING AND NAMING CONVENTION

The deliverables are classified according to the following types:

- R Document, report.
- DEM Demonstrator, pilot, prototype.
- DEC Websites, patent fillings, videos, etc.
- OTHER
  - ETHICS Ethics requirement
  - ORDP Open Research Data Pilot

With respect to the confidentiality of deliverables and other documents, including presentations, the following five levels of security are considered:

- PU Public.
- CO Confidential, only for members of the consortium (including the Commission Services).
- EU-RES Classified Information: RESTREINT UE (Commission Decision 2005/444/EC).
- EU-CON Classified Information: CONFIDENTIEL UE (Commission Decision 2005/444/EC).
- EU-SEC Classified Information: SECRET UE (Commission Decision 2005/444/EC).

In order to facilitate the common browsing and storage in different platforms and OS's, no spaces nor dots or special characters will be used in the document names, and instead, the underscore character “\_” will be used.

For the same reason, only lower-case characters will be used – except for the project acronym).

All these documents will be named and numbered according to the following rules, in order to facilitate the quick identification and indexing:



<dateYYYYMMDD>-<orgshortname>-EBENTO- d<dnum>-<docshortname>-<security>\_v<ver>.pdf

All the documents' names start with the delivery date of the document, followed by the acronym of the organisation responsible for the document and the word "EBENTO", in order to facilitate the identification with other projects documents, and to raise the awareness of the project within a number of people that will download the documents from the public website.

Versions 0\_X will indicate that the document is still a draft not approved by the internal reviewers. The official document to be sent to the EC will be numbered as v1\_0. Further revisions or new issues of a deliverable will make use of the following format: v1\_X, vY\_X.

For example, deliverable D1.1 Project Management Handbook, being ETRA the responsible organisation, security level confidential usage, to be delivered for example on 30<sup>th</sup> December 2022, would be named in the following way:

20221230-etra-EBENTO- d1\_1-project\_management\_handbook- co\_v1\_0.docx

In order to facilitate the work and localisation of the documents, all the documents will be posted in the repository as soon as possible.

## 5.4 DOCUMENT REPOSITORY

A document repository has been set up in order to facilitate the exchange of information. The tool selected has been alfresco [1]. The platform is built on an open-source core with open APIs and open standards support for easy integration and extension and long-term flexibility.

The repository will be hosted in the same server used for the web-tools used by the consortium and the project web-site. EBENTO will use alfresco to maintain current and historical versions of files such as source code and documentation.

The repositories can be accessed via web. The connection URL is:

- <http://tecbox.etra-id.com>. A new project based url will be used once the project web-site is activated.

Each partner in the consortium has been granted with a user password to access and modify the repository. The current structure includes a folder per WP, where all the information produced by the consortium or relevant to the project can be uploaded. Moreover, a specific folder to hold any information relevant to meetings (venues and minutes) has been created, jointly with a folder to keep a copy of the contract related documents – e.g. Consortium Agreement.

The structure can and will be updated as the project evolve in order to organize the information in the most efficient way for the partners.

At the implementation phase, git service will be set up in order to share common source code.



Additionally and for the aim to achieve a fluent interaction between partners, the one drive repository ([EBENTO one drive](#)) is used to include relevant files that should be dynamically and online change. Specific partners will have access to the relevant documents in order to work on them.

## 5.5 EBENTO LOGO AND ACRONYM USAGE



Figure 2 Main EBENTO Logo



Figure 3 Secondary EBENTO Logo



Figure 4 EBENTO isotype

It is advised to use the main logo as the first option. The EBENTO logo must appear in all EBENTO related documents. Any material co-funded with the project budget needs to make explicit reference to it – see section 10.1 – and, if possible, make use of the EBENTO logo. It has been developed in two different types in order to be able to use it in different formats and for different purposes.

In this way, the first logo is the official and corporate image of the project to be used by default. The second one is reserved to formats where the information has to be represented horizontally.

The Isotype of the project can be used as a complementary icon in official documents. Always the isotype is used the main or secondary logo of EBENTO should also appear (as an example we can find the word and ppt template using the isotype as page footer/header).



The Acronym of the project – i.e., EBENTO – is the main representative mark. When possible, it has to be used with the abovementioned logos, respecting the font and colours. Otherwise, it should be written with capital letters.

## 5.6 NOTIFICATION PROCEDURE

### 5.6.1 General procedure for document signatures

As a general procedure any notification sent to the project coordinator should be in two signed copies according to the following procedure:

- The person signing the document should be accordingly empowered to do it.
- Always sign the document by the authorised person: people in A forms, administrative and/or technical representative, according to the nature of the notification.
- In case he/she is not available, find an alternate authorised person empowered to sign the document. In that case, additionally send to the project coordinator two copies of a letter explaining the person is authorised and the empowerment by which he/she is authorised.
- Send a copy in advance.
- Paper copies should follow by express courier and a notification by e-mail to the project coordinator the day it was sent.
- In case any problem arises, the project coordinator should be contacted to solve the eventual situation.

### 5.6.2 Bank account: notification of changes

In the event of a partner's bank account changes, the project coordinator should be notified within 2 weeks in advance of any payment.

## 5.7 PARTICIPANT CONTACTS

### 5.7.1 Organisations

Part. Nr.	Organisation	Address	Short Name	Country
1	ETRA Investigación y Desarrollo S.A.	c/ Tres Forques 147 – 46014-VALENCIA (Spain)	ETRA	ES
2	Hypertech Sustainability Research and technology center non profit civil	PERIKLEOUS 32. - 152 32 - CHALANDRI ATTIKIS (Greece)	HYP	EL
3	Tallinna Tehnikaülikool	Ehitajate tee 5 – 19086 – TALLINN (Estonia)	TALTECH	EE
4	Valencia Clima i Energia	PLAZA DE LA ALMOINA 4 PLANTA 2 – 46033 – VALENCIA (Spain)	VCE	ES



5	Joanneum Research	LEONHARDSTRASSE 59 – 8010 – GRAZ (Austria)	JR	AT
6	Univerza v Ljubljani	KONGRESNI TRG 12 – 1000 – LJUBLJANA (Slovenia)	UL	SI
7	Institute for innovation and development of University of Ljubljana	KONGRESNI TRG 12 – 1000 – LJUBLJANA (Slovenia)	IRI UL	SI
8	Mytilineos	ARTEMIDOS 8 – 15125 – MAROUSI (Grece)	MYT	EL
9	The society for the reduction of carbon limited	22A Beswick St, Manchester M4 7HR– MANCHESTER (United Kingdom)	CCOOP	UK
10	Institute for European energy and climate policy stichting	KINGSFORDWEG 151 – 1043 GR – AMSTERDAM (Netherlands)	IEECP	NL
11	Centro de estudio de materiales y obra S.A.	CALLE BENAQUE 9 – 29004 – MALAGA (spain)	CMEOSA	ES

Table 6 Partners Contact List

### 5.7.1 Project Coordinator details

EBENTO Coordinator Contact Details	
EBENTO Coordinator	Antonio Marqués
Organisation	ETRA I+D
Postal address	Tres Forques, 147
	46014 Valencia (Spain)
Telephone	+34 96 313 40 82
Fax	+34 96 350 32 34
e-mail	amarques.etraid@grupoetra.com

Table 7 Coordinator details

## 6 Meetings

In order to co-ordinate and manage the various activities of the EBENTO project, a 2-days meeting will be held at a regular time basis, at least 2 times/year. This meeting will allocate time for the CP and PMB meetings. The PC will be in charge of setting up and updating (each year) a calendar of meetings – section 6.2, that may include dedicated SP meetings. Further project meetings may be planned whenever urgent issues will need to be resolved.

The project intends to run virtual electronic meetings whenever feasible and appropriate using information and communication technologies available as described in section 6.3. Face to face



meetings will be organised by the project partners in rotation. The following subsections clarify who will make invitations, how meeting decisions are to be taken, and how meetings are to be recorded. When specific decisions must be taken in the short term, extraordinary meetings may be held by audio-conferencing, including management aspects that may have as consequence the request of an amendment to the Grant Agreement; in this case, the voting shall be held via e-mail.

In terms of attendance, and for all ebento PMB meetings, the presence of the Technical Manager (TM), Dissemination Manager (DM), Business and Innovation Manager (BIM), LEPI Officer and all SP Leaders (or any representatives of their respective companies), is required.

In relation to the CP meetings all partners must attend.

## 6.1 MEETING REQUESTS

Meetings are invited by the corresponding chair: the SP leader for a SP workshop or meeting (and even Work Package and Task leader if required), the responsible of each product/HLU (High Level Use case), and the PC for a PMB meeting and a CP meeting.

The host of the meeting will provide logistics and accommodation information to the participants. In the case of meetings in a dedicated location in Brussels, the PC will be in charge of organising the meeting.

The following tables summarize the main issues about preparation and organization of meetings:

### 6.1.1 Convening meetings

	Ordinary meeting	Extraordinary meeting
Consortium Plenary	At least twice a year	At any time upon written request of the PMB or 1/3 of the Members of the CP.
Project Management Board	At least twice a year in the same dates of the CP. Biweekly remote meetings to follow project progress	At any time upon written request of any Member of the PMB
Other meetings		At any time upon written request of partner who chair the meeting

Table 8 Convening meetings

### 6.1.2 Notice of a meeting

	Ordinary meeting	Extraordinary meeting
Consortium Plenary	45 calendar days	15 calendar days (10 calendar days in case of meetings by teleconference or other telecommunication means)



Project Management Board	14 calendar days	7 calendar days
Other meetings	14 calendar days	7 calendar days.

Table 9 Notice of a meeting

### 6.1.3 Agenda definition

	Ordinary meeting	Extraordinary meeting
Consortium Plenary	21 calendar days. Partners may add items to the agenda until 14 calendar days before the meeting	10 calendar days for an extraordinary meeting. Partners may add items to the agenda until 7 calendar days before the meeting
Consortium Plenary	7 calendar days. Partners may add items to the agenda until 2 calendar days before the meeting	3 calendar days. Partners may add items to the agenda until 2 calendar days before the meeting
Other meetings	7 calendar days. Partners may add items to the agenda until 2 calendar days before the meeting	3 calendar days or at the same time of the meeting notice. Partners may add items to the agenda until 2 calendar days before the meeting

Table 10 Agenda definition for a meetings

## 6.2 MEETINGS SCHEDULE

Considering the project Work Plan and the budget constraints for meeting purposes, a preliminary schedule for the meetings during the entire life-time of the project has been created. As stated in section 0, this plan will be updated on a yearly basis.

For practical reasons, the following schedule only identifies the most convenient month to host each meeting, the exact dates and venue will be decided by the PMB considering availability of partners, rooms and progress of activities.

Year	Meeting	Month	
2022	KO-VALENCIA (ES)	Oct 22	M1
2023	CP-ZAGREB (HR)	Feb 23	M5
	CP – ATHENS (EL)	Jul 23	M10
	CP	Dec 23	M15
2024	R1p	Mar 24	M18
	R1	Jun 24	M21



	CP	Nov 24	M26
2025	CP	Apr 25	M31
	R2	Sep 25	M36

Table 11 Meetings Schedule

### 6.3 VIRTUAL MEETINGS

The Coordinator has established a Microsoft teams service for the management of virtual meetings. If necessary, other tools – as Skype, webex or phone calls – can also be used.

The virtual meetings will be used for the monitoring of the project progress – i.e. biweekly PMB meetings – or specific work sessions – i.e. webinars. Some basic recommendations to be followed when organising/participating at the virtual meeting can be found hereafter:

- Virtual meetings will be limited in duration. It is recommended to avoid long meetings – no longer than 1 hour.
- All partners are requested to connect to the virtual meeting service 5 minutes in advance, to solve any potential technical problems.
- All microphones must be muted when the partner is not actively participating in the discussion.
- Any partner joining or leaving the meeting is requested to announce it, preferably through the chat tool.
- Even if the service enables the sharing of a screen, it is recommended to circulate in advance – i.e. upload to the project repository – all the material to be used during the meeting.

### 6.4 MEETING MINUTES

The following rules will apply to minutes:

**Recording:** Minutes must be recorded for every official project meeting. A rapporteur is appointed at the start of the meeting. Meeting minutes will be taken in turn in the following manner:

- **CP and PMB meeting minutes** are recorded by the chairperson of the meeting, supported by at least one designed member of a Consortium partner.
- **Other meeting minutes** are recorded by the member organisation hosting the meeting.

A copy of the minutes will be archived in the project repository.

**Consolidation / Approval:** As a general procedure, the draft meeting minutes will be circulated to all Members by the chairperson within 10 calendar days of the meeting.

The minutes shall be considered as accepted if, within 15 calendar days from sending, no Member has sent an objection in writing to the chairperson.



- Circulation / Distribution: The chairperson will circulate the final version of the minutes all the partners that were called to the meeting and to the PC.
- Content: The minutes must at least contain:
  - The meeting attendance list;
  - The approved meeting agenda, including date and venue;
  - Decisions taken, including motivations as far as possible;
  - An action list containing for each action a short description, a responsible and a time schedule (if an action was given to a person not attending the meeting, a person for contacting that person needs to be given);
  - A list of agreed upcoming events;
  - If appropriate, a list of related documents (appendices).

## 7 Reporting Procedure

### 7.1 DELIVERABLE, DOCUMENTS

Any deliverable or document, including presentations, must follow the rules herein specified.

The ultimate responsibility for the quality of deliverables resides with the peer review team that must check the quality of all deliverables (not including the periodic progress reports), before the final submission to the EC.

ETRA, as project coordinator, will review the progress reports containing resource reporting information, as the last stage before submission to the EC.

Deliverables will normally fall within the work to be done in the work packages, and as such, a work package leader or activity leader will be assigned the production and editing of a particular deliverable.

Once the project coordinator has submitted the deliverable to the project officer, he/she will upload simultaneously the PDF version in the restricted web server. Once the document is approved by the EC, in the case of a public deliverable, the document will be made available in the public web site.

At least the project coordinator will keep an additional copy for backup and security reasons.

The deliverables will be submitted electronically to the Project Officer.

Each partner responsible of a deliverable should send (or upload in the repository) a preliminary version of the deliverable to the WP coordinator fifteen days in advance of due date.

The WP leader will forward it to the peer reviewers, who will review the document and send comments within one week using the peer review report template available at the repository. The deliverable responsible partners will modify the document accordingly and send it to the project coordinator at



least 5 working days before the delivery date. The document shall contain all the logos and it will be formatted according to this project management plan recommendations.

The peer review team will review the deliverable. In case they encounter the document does not fulfil the requirements for such document, they will notify the deliverable responsible partners within one week after the request, and by means of the peer review report. Whether the deliverable responsible partner fails to deliver the document, or the document does not fulfil the objectives, the PMB will take the required actions accordingly to the provisions of the Consortium Agreement and Contract. In case the deliverable fulfils the required objectives, the project coordinator will send it to the Commission.

A deliverable template (initially referring to all deliverables except if explicitly mentioned) is available in the project repository. This template is to be used for all technical deliverables. It may also be used for non-technical reports and other project documents. The first two pages will contain information that are necessary for the identification of the document including its status, editor(s) and contributors, the companies they belong to, version history and date. For official deliverables, the title page must contain the name of the deliverable as defined in the DoA annexed to the Contract (GA).

For public deliverables, these initial pages will be substituted for public release versions, avoiding project terminology and, whenever possible, making use of pictures/ graphic design for a more attractive appearance.

For **public deliverables**, the following the following mention and disclaimer must be included:

 <p><b>Funded by the European Union</b></p> <p>This project has received funding from the European Union's Horizon Europe research and innovation programme under the Grant agreement N° 101079888.</p>
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Additionally, all document, must include the Copyright Statement:

***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. Neither the European Union nor the granting authority can be held responsible for them.***

This document and its content are the property of the EBENTO Consortium. All rights relevant to this document are determined by the applicable laws. Access to this document does not grant any right or license on the document or its contents. This document or its contents are not to be used or treated in any manner inconsistent with the rights or interests of the EBENTO Consortium or the Partners detriment and are not to be disclosed externally without prior written consent from the EBENTO Partners.

Each EBENTO Partner may use this document in conformity with the EBENTO Consortium Grant Agreement provisions.

## 7.2 PRESENTATION, POSTERS AND GRAPHICAL MATERIAL



Any presentations of contents obtained from the project may make use of the corporative presentation template available at the repository.

In addition to the available template, the consortium has prepared a number of alternative materials to help disseminating and presenting the project results in a coherent and effective way:

- A general presentation has been compiled to provide a quick look to the project objectives and contents. This set of slides will be updated periodically with the new results as the project advances.
- A flash animation/video will be available for presentation purposes. The animation is embedded in the web site and provides an artistic vision of the project approach.
- Two different poster templates are available in A3 format to present the project at conferences and poster sessions.
- A newsletter template is also available for dissemination. The consortium will produce a minimum of six newsletters (two per reporting period).
- A brochure template has been prepared to promote and enhance the visibility of the project.

Last but not least, the project will make use of other means, as video reports, to support the dissemination of the tests in the pilot sites. Free tools as YouTube will be employed to make those reports available to the broad public. The general rules applying to the reporting procedures in EBENTO, should also be observed when preparing video material.

### 7.3 MEETING MINUTES AND AGENDA

As stated in section 6.4, the reporting of meetings is mandatory to guarantee that the decisions taken are known and accepted by all the people working in the project.

The chairperson of the meeting will be responsible of producing the minutes following the **template available at the project repository** in no more than 10 days.

### 7.4 BIENNIAL REPORT

Every six months the coordinator will ask the partners to complete a simple form to gather the (possibly estimated) basic information on the resources spent per partner and the work performed.

The Biennial Report shall be available no later than 2 weeks after the end of the period. The project coordinator will analyse the reports, taking the requested actions in case of need.

### 7.5 PROJECT PERIODIC REPORT

In order to provide timely project reporting to the Commission, efficient and accurate financial data, the periodic cost statements will be aggregated by each partner in the Project Periodic Report, making use of the Participant portal and the continues reporting tool provided by the EC.



The Project Periodic Report (PPR) has to be consistent with the biannual reports provided both at technical and administrative levels.

ETRA, as project coordinator will check the data of the PPR and the data from the biannual reports. If any difference arises, the partner should correct them within two weeks from notification.

ETRA will submit the Progress Periodic Report to the EC once the information from all partners is retrieved. If a partner cannot meet the deadline established by the EC – i.e. 60 days after the end of the reporting period – the Coordinator will submit the PPR with the available information in order not to jeopardise the work of the rest of the consortium.

## 8 Quality management

The main goal of project management is to provide a focused, lean but effective framework to support the partnership in achieving the scientific and technical objectives of the project. Efficient decision-making processes and swift responsiveness to changing circumstances are required. This is what the theory says, but it is not so easy to achieve since experience shows that outstanding –and very often too complex- quality management plans fail simply because they are very difficult to apply in practise.

In the following section, it is described how EBENTO will put into operation -from a very pragmatic perspective-, all these principles, but taking into consideration the specific strengths and constraints of EBENTO consortium.

The goal has been to define a management structure and a set of principles and procedures which, whilst being as flexible, agile and cost-efficient as possible, leave as little room as possible to subjective interpretation.

### 8.1 MANAGEMENT STRUCTURE

The project management structure is based in a shallow management hierarchy with transparency in the information flow in order to facilitate a team of empowered and motivated individuals to respond to the needs of new product development and large demonstrations. The goal will be to define a management structure and a set of principles and procedures which, whilst being as flexible, agile and cost-efficient as possible, leave as little room as possible to subjective interpretation.



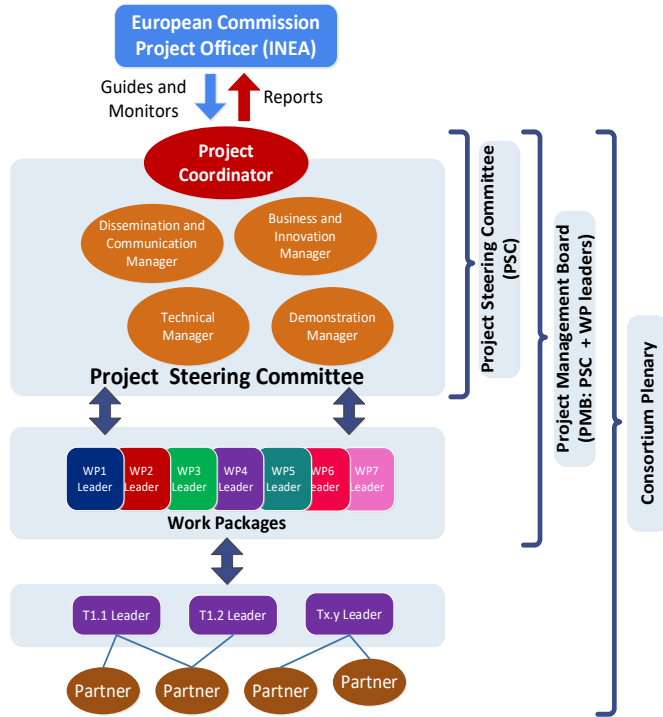


Figure 5 EBENTO Management Structure

The work to be done within EBENTO is structured into a set of WPs (led by WP leaders) which are at the same time divided into a set of tasks, led by Task Leaders (TL) as shown in Figure 5. The **Project Coordinator (PC)** takes responsibility for overall project management. This includes interactions with the EC on contract-related issues as well as chairing regular management meetings, set of administrative and financial tasks -representing the project in the contract negotiation, and in relation to the Commission’s Project Officer, representing the consortium in workshops and official meetings, collecting administrative reports from partners and forwarding periodical reports to the Project Officer, preparing and updating the consortium agreement between the participants, administering

project resources and project spending, managing the overall ethical and gender issues, etc. The PC is supported in monitoring the project’s performance, managing the technical audits, supervising the preparation of the final deliverables by the **Project Steering Committee (PSC)**. Reasons for any deviations from the project plan will be identified and the necessary corrective actions will be agreed by the PSC. Roles comprised by the PSC are the **Technical Manager (TM)**, who supports the PC in technical matters, e.g. strategic decisions regarding technical designs and implementations; the **Dissemination and Communication Manager (DCOM)** who will be responsible for all dissemination activities and direct interaction with end-users and mass media, the DCOM will lead the definition of the project website structure and functionalities, being part of the project website the project repository, i.e. a collaboration working space for the exchange, sharing and storage of project documentation (deliverables, white papers, agendas, minutes, reports, etc.). The **Business and Innovation Manager (BIM)** will be in particular responsible for the exploitation activities and innovation management. **WP leaders (WPL)** are responsible of activities and objectives specified in the project plan, as well as for carrying out the respective deliverables on time, and ensuring no delays in the accomplishment of the tasks. WPLs will coordinate the activities within the WPs and will work in close cooperation with the SPLs. Together with the PSC the SPLs form the **Project Management Board (PMB)** which will convene twice a month to discuss the progress of the individual WPs. Within each work package the **Task leaders (TL)** will be the direct responsible for the day-to-day work needed to carry out the tasks related to their specific activity. Their coordination work is not subject to any



additional administrative or reporting burden; instead they will act as team leaders of all the individuals from the different partners involved in a specific task. Major changes in the project plan, such as reallocation of resources, may be done within the limits of agreements, by the decision of the PMB as put forward by the Project Coordinator.

Last but not least, all the partners are represented in the **Consortium Plenary (CP)**. The CP is the key liaison between the project and partner organisations. In the CP meetings the Project Coordinator will present the project's status and plans for the next period. Representatives of the partner organisations will be able to voice their opinions and ask for more elaborated information on the progress and plans. The CP meetings shall take place twice a year and, when possible, in conjunction with the scientific and technical dissemination activities of the project.

Project Management Board			
Project Coordinator	Antonio Marqués (ETRA)	WP2 leader	Andreas Tuerk (JR)
Deputy Project coordinator	Elena Leal (ETRA)	WP3 Leader	Ana Isabel Martinez (ETRA)
Technical Manager	Giorgos Pitsiladis (HYP)	WP4 leader	Nicolas Stathopoulos (HYP)
Dissemination Manager	Raquel Castán (ETRA)	WP5 Leader	Alejandro Gómez and Raquel Sanchez (VCE)
Business and Innovation Manager	Shima Ebrahimi (IEECP)	WP6 Leader	Ivana Rogulj (IEECP)
WP1 Leader	Elena Leal (ETRA)	WP7 Leader	Raquel Castán (ETRA)

Table 12 – Project Management Board

## 8.2 CONFLICT RESOLUTION

All partners of the EBENTO Consortium share the perception that in order to ensure smooth project implementation, formal and pragmatic decision making mechanisms must be in place to resolve potential disputes. Decisions regarding a technical issue of major importance, affecting the input, work content or the final outcome are expected to be made by the PSC led by the Project Coordinator and the Technical Manager. In general, all major technical issues and the related decisions are announced to all partners, even if the issue is not directly connected to their participation. Decision making for important matters within the frame of the Grant Agreement and the Consortium Agreement, especially when such decisions may affect the agreements reached in these two contracts, will be addressed by the PSC. Decision making in the administrative domain is the responsibility of the PC with the support of the PSC. Individual financial issues are primarily the responsibility of the partner itself. In accordance with the CA provisions for decision making, the main principles are: (i) All partners have the same voting rights independently of their economic and technical contribution, and; (ii) Decisions to be taken in the PSC (min. quorum 3/4 of the members) will be taken upon 3/4 of the votes.



Identification of any conflicts lies in the responsibility of each project participant. Any signs of disagreement between project participants should be solved amicably between those partners involved. If not resolved at that level, and only if it is strictly necessary, conflict resolution process must be enforced. Then Project participants will escalate the issue to higher management levels until it is resolved (to TL or WPL), consensus to solve the problem will be seek at each level. Eventually, if still not resolved, the PSC will take care of the issue applying the same rules as in the decision making process.

### 8.3 QUALITY ASSURANCE

As a part of this Project Management Plan, the project will apply an internal reviewing procedure to guarantee the quality of its results. Each WP leader will be responsible for the quality of the results – especially deliverables - of his WP, which will be subject to a peer review by at least two experts, one of whom will be another WP leader – the one which will take as input the results of the WP being reviewed. Furthermore, Backup WP leaders have been nominated in order to ensure quality process enforcement and reduce risks during project implementation.

Del	Deliverable name	Leader	Date	Peer review
D1.1	Project Management Handbook	ETRA	3	IEECP
D1.2	Data Management Plan	ETRA	6	HYP
D2.1	Preliminary Business models and market analysis	JR	12	ETRA
D2.2	EBENTO Use Case definition and innovative business models	ETRA	24	JR, UL, IRI UL
D3.1	One-stop-shop technical definition	HYP	18	CEMOSA, ETRA
D3.2	Energy performance contract for EBENTO one-stop-shop	IEECP	18	JR, IRI UL
D4.1	Energy efficiency modules development	ETRA	22	MYT, TalTech
D4.2	Simulation modules development	HYP	22	CEMOSA, ETRA
D5.1	Demonstration activities and citizens engagement plan	TalTech	24	CCOOP
D5.2	Demonstration activities results	TalTech	33	HYP, IRI UL
D5.3	Citizens' engagement result	VCE	33	IRI UL
D6.1	Technical impact assessment and verification methodology	HYP	36	ETRA
D6.2	Socio-economic impact assessment	IEECP	36	VCE, CCOOP
D6.3	Replication Handbook	CCOOP	36	UL
D7.1	Plan for Exploitation and dissemination of results	ETRA	3	CEMOSA, HYP
D7.2	Dissemination, Communication and Cooperation activities	ETRA	24	VCE
D7.3	Handbook lessons learned	CCOOP	36	JR

Table 13 - Quality Assurance: Peer Review Responsible Partner



Each partner responsible for a deliverable will provide (or upload in the repository) the proposed table of contents at least 60 days before the submission date. A preliminary full version of the deliverable will be sent to the WPLs as well as to the peer reviewers allocated in the table at least four weeks in advance of the due date. The Project Coordinator and the Technical Coordinator will be also informed. It needs to be noted that early draft versions of the deliverable should be periodically circulated in order to confirm that the work progresses as expected, and progress update will be reported during the monthly PSC meetings.

Peer reviewers will review the document and send comments within one week using the track changes mode in the draft version of the document. In case they encounter that the document does not fulfil the requirements for such document, they will notify accordingly the deliverable responsible partners within one week after the request.

The new version of the document will be again available for the deliverable responsible partner who will modify the document accordingly. Upon confirming with the peer reviewers that their comments have been effectively addressed, the final version will be sent to the PC at least one week before the delivery date.

In the case that the deliverable fulfils the required objectives, the PC will submit it to the EC.

Whether the deliverable responsible partner fails to deliver the document, or the document does not fulfil the objectives, the PSC will take the required actions according to the provisions of the consortium agreement and contract.

The process of internal review is summarized in the following diagram:

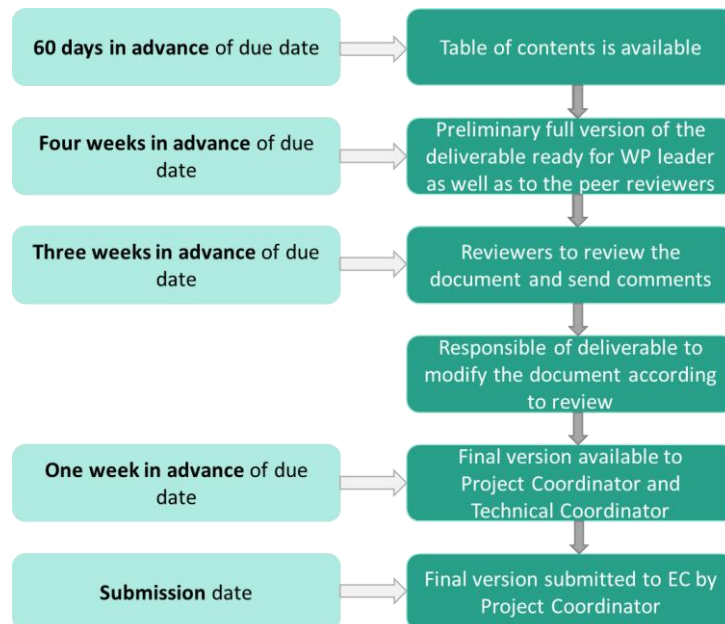


Figure 6 Internal review procedure for deliverables



The peer review reports, the PMB meetings and the biannual meetings described in section 7.4 are the main tools in EBENTO to monitor the progress and quality of the project.

## 9 Risk management

The consortium's experience in managing complex international projects in conjunction with its technological competence on communication and networking permits to identify the following main areas of possible risks:

- **Technical:** lack of competence to overcome unexpected difficulties.
- **Financial:** deterioration of the economic situation of a partner, which imposes a stop or an unacceptable reduction of all its activities.
- **Key resources availability:** abandon of the participation to the project of resources with key roles.

Various combinations of these three main negative factors could also happen with the effect to increase their impact.

The level of technical risk is intrinsically reduced by the composition of the EBENTO Consortium, thanks to the participation of a well-assorted set of primary Industries and Research Centres, with a demonstrable consolidated experience as leaders in the technological areas in which each of them contributes to the project.

In case of financial problems or lack of resources availability, the corrective measures will include distributing to the remaining partners the activity not fulfilled or to subcontract them to a third party, or a combination of the two. The corrective measures will be chosen after an evaluation of their impact and relevance on the project. Furthermore, in order to minimise the potential impact of these unlikely situations, each WP leading partner will have a backup leading partner in case the initial WP leader becomes unavailable –see previous table.

For the EBENTO project, a risk is defined as an event that may or may not occur in the future, which could potentially have an adverse effect on a team's progress and success. A risk has a severity of impact and a probability of occurrence – formal definition can be found in next section.

### 9.1 DEFINITIONS

#### Risk

Risk is a measure of the inability to achieve overall project objectives within defined cost, schedule, and technical (performance and quality) constraints and has two components:

- The probability of failing to achieve a particular outcome and
- the consequences (impact) of failing to achieve that outcome.



For EBENTO, risk is a measure of the difference between actual performance of a process and the known best practice for performing that process.

Risk can also be the potential that a given threat will exploit vulnerabilities of an asset or group of assets to cause loss of, or damage to, the assets. It is ordinarily measured by a combination of effect and likelihood of occurrence.

### **Risk Event**

Risk events are those events within EBENTO that, if they go wrong, could result in problems in the development of the expected research results, production and assessment of the prototypes, and dissemination of the results. Risk events should be defined to a level such that the risk and causes are understandable and can be accurately assessed in terms of likelihood/probability and consequence to establish the level of risk.

### **Type of Risk**

A **Technical Risk** is the risk associated with the evolution of the research results and the prototypes development of EBENTO affecting the level of performance necessary to meet the requirements of the DoA.

A **Financial Risk** is associated with the ability of the project to achieve its cost objectives as determined in the DoW. Two risk areas bearing on cost are:

- The risk that the cost estimates and objectives are not accurate and reasonable and
- the risk that project execution will not meet the cost objectives as a result of a failure to mitigate technical risks.

**Schedule Risks** are those associated with the adequacy of the time estimated and allocated for the development, production, and fielding of the system. Two risk areas bearing on schedule risk are:

- The risk that the schedule estimates and objectives are not realistic and reasonable and
- the risk that program execution will fall short of the schedule objectives as a result of failure to mitigate technical risks.

### **Risk Ratings**

This is the value that is given to a risk event (or the overall project) based on the analysis of the likelihood/probability and impact of the event. For EBENTO, risk ratings of *Low*, *Moderate*, or *High* are assigned based on the following criteria:

- **Low Risk:** Has little or no potential for increase in cost, disruption of schedule, or degradation of performance. Actions within the scope of the planned project and normal management attention should result in controlling acceptable risk.
- **Moderate Risk:** May cause some increase in cost, disruption of schedule, or degradation of performance and/or quality. Special action and management attention may be required to control acceptable risk.



- **High Risk:** Likely to cause significant increase in cost, disruption of schedule, or degradation of performance and/or quality. Significant additional action and high priority management attention will be required to control acceptable risk. This type of risk may be subject to a report to the Commission.

### Contingency Plan

Once identified and assessed, it is essential to trace risks both in their status (Risk Monitoring) and with respect to necessary activities. A contingency plan should cover the registration and reaction to the change of environmental conditions to avoid risk events.

## 9.2 RISK MANAGEMENT ORGANISATION AND RESPONSIBILITIES

The EBENTO Coordinator (**PC**) is the overall risk manager and responsible for:

- Briefing the consortium on the status of EBENTO risks during CP meetings.
- Tracking efforts to reduce high risk to acceptable levels.
- Facilitating consortium-level risk assessments during PMB meetings.
- Combining risk briefings, reports, and documents as delivered by the WP leaders and required for project reviews by the Commission.

The **PMB**, and in particular the TM, assists the PC with:

- Maintaining this section of the Project Management Plan - Risk Management – updated (as a supporting process) for EBENTO.
- Provision and maintenance of the risk information form.

The **Work Package Leaders** are responsible for the risk assessment within their work packages:

- Risk identification.
- Risk analysis.
- Risk handling.
- Risk information to the PC (in case of moderate or high risk).
- Risk monitoring.
- Briefing the respective Work Package members on the status of risks.
- Tracking efforts to reduce low and moderate risk to acceptable levels.
- Preparing risk briefings, reports, and documents required for project reviews during PSC meetings.

## 9.3 RISK MANAGEMENT PROCESS



This section describes the EBENTO risk management process and provides an overview of the EBENTO risk management approach. Table 14 shows, in general terms, the overall risk management process that will be followed in EBENTO. Each of the risk management functions shown in Table 14 is discussed in the following paragraphs, along with specific procedures for executing them.

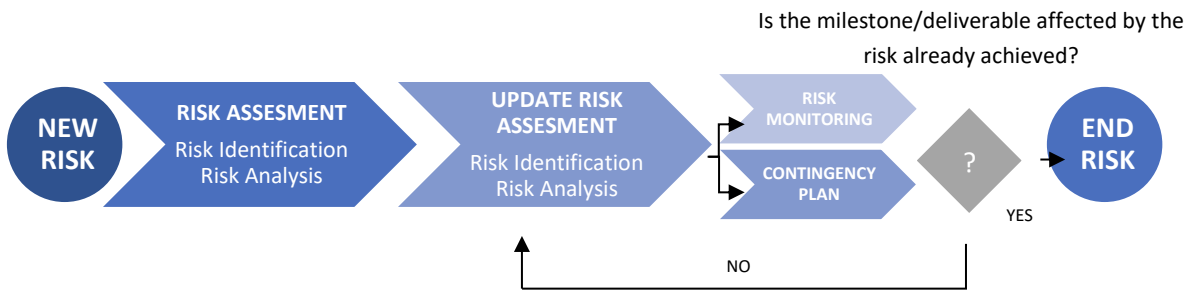


Table 14 – Risk Management Process

### 9.3.1 Risk Assessment

Risk assessment includes the identification of critical risk events/processes, which could have an adverse impact on the project, and the analysis of these events/processes to determine the likelihood of occurrence/process variance and consequences.

Risk assessment is an iterative process. Each risk assessment is a combination of risks identified/analysed in the previous phase and the identification/analysis of risks on current milestones/deliverables according to the DoA.

### 9.3.2 Risk Identification Process and Procedure

Risk identification is the first step in the assessment process. The basic process involves searching through the entire EBENTO project plan to determine those critical events that would prevent the project from achieving its objectives.

All identified risks will be documented in the Risk Table – see section 9.4 -, with a statement of the risk and a description of the conditions or situations causing concern and the context of the risk.

Risks will be identified by all individuals in the EBENTO project, *particularly by the Work Package Leaders.*

The basic procedure of identifying risks consists of the following steps:

1. Understand the requirements and the overall project quality and performance goals. Examine the operational (functional and environmental) conditions under which the values must be achieved by referring or relating to the DoA.
2. Identify the processes and activities (tasks) that are needed to produce the results.
3. Evaluate each activity/task against sources/areas of risk.



## Risk Indicators

Following indicators are helpful for identifying risks:

- Lack of stability, clarity, or understanding of requirements: Requirements drive the research and the design of the prototypes. Changing or poorly stated requirements guarantees the introduction of performance, cost, and schedule problems.
- Failure to use best practices virtually assures that the project will experience some risk. The further the deviation from best practices, the higher the risk.
- Insufficient or inadequate resources: People, funds, schedule, and tools are necessary ingredients for successfully implementing a process. If any are inadequate, to include the qualifications of the people, there is risk.
- Test Failure may indicate corrective action is necessary. Some corrective actions may not fit available resources, or the schedule, and (for other reasons as well) may contain risk.
- Negative trends or forecasts are cause for concern (risk) and may require specific actions to turn around.
- Communication is a critical success factor for EBENTO. Failure to provide (push) available information actively as well as to demand (pull) required information actively will both introduce considerable risk.

## Risk Analysis Process and Procedure

Risk analysis is an evaluation of the identified risk events to determine possible outcomes, critical process variance from known best practices, the likelihood of those events occurring, and the consequences (impact) of the outcomes. Once this information has been determined, the risk event may be rated against the project's criteria and an overall assessment of low, moderate, or high may be assigned.

The basic procedure for analysing risk comprises the following steps:

1. Gather all identified risks.
2. Assignment of likelihood/probability and consequence to each risk event to establish a risk rating.
3. Prioritisation of each risk event relative to other risk events.
4. Quantitative analysis.

For each risk identified during the risk identification process an assignment using likelihood/probability- and impact-assessments will be performed. A risk assessment matrix (Table 15) is used for EBENTO, to provide a quantitative approach for this process.



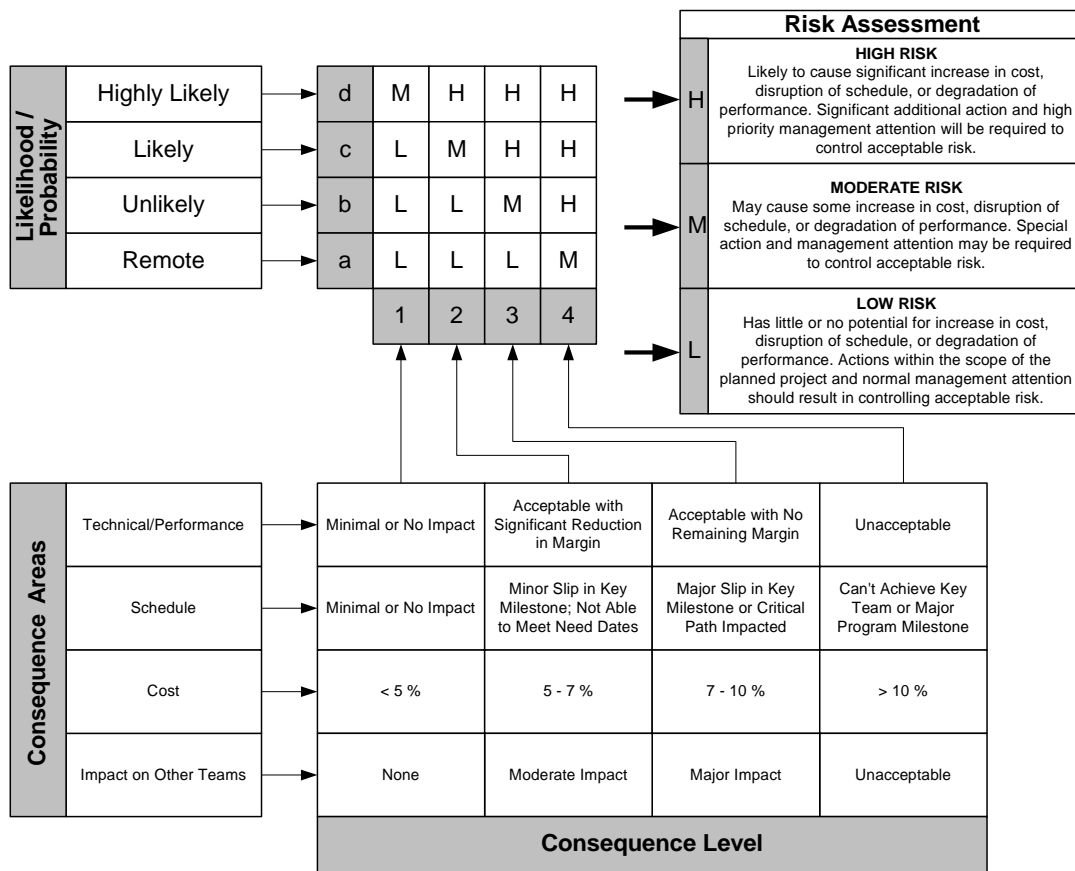


Table 15 – Risk Assessment Matrix

The following items provide some more details on the most important issues of the risk assessment matrix:

- Likelihood/Probability:** For each risk area identified, the likelihood/probability of the risk must be determined. There are four levels (a-d) in the EBENTO risk assessment process, with the corresponding criteria of Remote, Unlikely, Likely and Highly Likely. If there is zero likelihood of an event, there is no risk per our definition.
- Consequence/Impact:** For each risk area identified, the following question must be answered: Given the event occurs, what is the magnitude of the consequence? There are four levels of consequence (1-4) for this project. Further, there are four areas that we will evaluate when determining consequence: technical performance, schedule, cost, and impact on other teams (work packages). At least one of the four consequence areas needs to apply for there to be a risk; if there is not adverse consequence in any of the areas, there is not risk at all.
  - Technical Performance:** this category refers to content and includes all requirements that are not included in the other three metrics of the consequence table.
  - Schedule:** this category refers to impacts in the overall time framework of the project. It is important to avoid excluding a consequence level from consideration just because it does not affect the work plan of a specific team/work package – i.e. try to have the whole EBENTO consortium in mind.



- **Cost:** since costs vary significantly within EBENTO, the percentage criteria shown in the matrix may not strictly apply at the lower levels of the work breakdown structure. Therefore, the work package leaders may set the percentage criteria that best reflect their situation, but have to report any deviation from the matrix to the PC.
- **Impact on Other Teams (work packages):** both the consequence of a risk and the mitigation actions associated with reducing the risk may impact another team. This may involve additional coordination or management attention (resources) and may therefore increase the level of risk.

### Evaluation of Risks

During Risk Analysis it is possible that identified scenarios of occurring risk events cause impact to several impact areas. In this case a consequence combination is present and the worst case of the risk assessment (high risk, moderate risk, low risk) is applicable and influences the required actions as described in the matrix. Of course, all identified consequence areas to a risk event must be recorded and the consequence area caused the final assessment has to be clearly identified.

### Quantitative Analysis

After completion of the risk analysis the quantitative analysis takes place and assigns a rating to each risk (low, medium, high). This finally yields an overview on the risk status over the entire course of the project and is part of the risk table in section 9.4.

### 9.3.3 Risk Monitoring

#### Risk Monitoring Process

Risk monitoring systematically tracks and evaluates the performance of risk-handling actions. It is part of the management board function and responsibility and will not become a separate discipline. Essentially, it compares predicted results of planned actions with the results actually achieved to determine the status and the need for any change in risk-handling actions.

To ensure that significant risks are effectively monitored, risk-handling actions will be reflected in risk table and analysed at each CP meeting. Identifying these risk-handling actions and events in the context of the work breakdown structure establishes a linkage between them and specific work packages, making it easier to determine the impact of actions on cost, schedule, and performance.

#### Risk Monitoring Procedure

Each member of the consortium is responsible for monitoring and reporting the effectiveness of the handling actions for the risks assigned.

Risks rated as **High** will be reported to the PC, who will handle and track them until the risk is considered Medium or Low and recommended for "Close Out".



Risks rated as **Moderate** will be reported to Ws, who will also track them until the risk is considered Low and recommended for "Close Out". However, the risk will be handled within the work package under the responsibility of the work package leader.

Risks rated as **Low** are tracked within the work package and monitored continuously to ensure they stay low.

The risk management process is continuous. Information obtained from the monitoring process is fed back for reassessment and evaluations of handling actions to improve the process itself in co-operation with the risk manager and the quality manager.

### 9.3.4 Contingency Plan

#### Risk Handling Process

After the project's risks have been identified and assessed, the approach to handle each significant risk must be developed. There are essentially four techniques or options for handling risks:

- Avoidance (application of tasks in order to avoid the risk event).
- Control (watch the environmental conditions for influences to an already assessed risk).
- Transfer (application of tasks to set a risk to a lower level).
- Assumption (base a decision for handling plans on the assumption the risk event happens).

For all identified risks, the various handling techniques should be evaluated in terms of feasibility, expected effectiveness, cost and schedule implications, the effect on the system's technical quality/performance and the most suitable technique selected.

The results of the evaluation and selection will be included and documented in the risk table. This documentation will include:

- What must be done,
- the level of effort and materials required,
- the estimated cost to implement the plan,
- a proposed schedule showing the proposed start date,
- the time phasing of significant risk reduction activities,
- the completion date,
- their relationship to significant Project activities/milestones,
- recommended metrics for tracking the action,
- a list of all assumptions,
- the person responsible for implementing and tracking the selected option (usually the responsible work package leader).

#### Risk Handling Procedure



The respective work package leader or (in case of high risk) the PC is responsible for evaluating the risk handling options that are best fitted to the project's circumstances. Once approved, these are included in the work package's or project's strategy or management plans, as appropriate.

For each selected handling option, the responsible project team member will develop specific tasks that, when implemented, will handle the risk. The task descriptions should explain what has to be done, the level of effort, and identify necessary resources. The team member should also provide a proposed schedule to accomplish the actions including the start date, the time phasing of significant risk reduction activities, the completion date, their relationship to significant Project activities/milestones and a cost estimate. The description of the handling options should list all assumptions used in the development of the handling tasks.

## 9.4 RISK TABLE

The main tool to keep track of the different identified risks is the Risk Table. It contains all the fields to correctly assess, monitor and mitigate a risk.

The table is structured considering the WPs in EBENTO in order to create a direct connection – by default – between the risks and the responsible of its control. It could be the case that the risk manager – or WP leader – is not the same as the risk responsible – partner that should provide an action plan and mitigate the problem.

The risk table provides an easy way to quantify the severity of the problem. It implements the risk assessment matrix described above and a global risk indicator that considers the assessment of the four consequence areas as a whole.

In this way, the partner identifying a risk, only has to indicate the probability of the risk (HL=Highly Likely=4; L=Likely=3; U=Unlikely=2; R=Remote=1) and the impact in each of the consequence areas (1 Minimum, 4 Maximum). The table is capable of translating the assessment into the three categories (high risk, moderate risk, low risk) and calculate the global indicator as an average of the different areas (0 Minimum, 4 Maximum).

As explained before, a low global indicator may still imply a high risk, since the worst case should be always considered. A high risk in a single area will imply a low global indicator; however it requires the maximum priority and attention. The global indicator serves to prioritize and order risks with the same qualification but affecting more than one area. The risk table will be available at the project repository and will be update with the whole consortium inputs during the project lifetime.

Following the table including the risks and the mitigation strategies detected until M18



	Nº Risk	WP Leader or Risk manager	Risk description	Type of Risk	Ms or D affected	Risk Assessment	Global Risk Indicator	Contingency Plan or link to document
							0=Min; 4=Maxi	
WP 1	WP1-1	ETRA	COVID Crisis or similar physical barriers affects the development, deployment, integration, demonstration, and evaluation of EBENTO	Schedule	ALL	LOW	0,3125	The technical partners are skilled in remote work if it was necessary to avoid unnecessary contacts. Likewise, social science partners have previous experience with remote qualitative research methodology. All COVID protocols will be followed by all partners in any circumstance
	WP1-2	ETRA	Deterioration of the economic situation of a partner	Financial	ALL	LOW	0,375	All partners have a solid economic situation. However, the corrective measures would be the distribution to the remaining partners of the activity not fulfilled or to subcontract to a 3 <sup>rd</sup> party or a combination of both
WP 2	WP2-1	JR	Lack of available information for energy performance contracts and guarantees innovation	Technical	D2.1 / M3	HIGH	1,5	High expertise of partners on energy performance contracts and large background on similar projects developments. More real-life business models would be analysed and implemented for the OSS platform
WP 3	WP3-1	ETRA	Pilot deployment constraints and poor quality of data to validate the results.	Technical	D5.2 / M7	MODE RATE	1,3125	Use data of other possible pilots with similar characteristics considering the enhancement of data extrapolating the data to the EBENTO pilot sites to be able to evaluate in an accurate manner.
	WP3-2	HYP	Technical architecture definition not covering the real needs for the module development and integration on the common OSS	Technical	D3.1 / M7	MODE RATE	0,875	Performing specific workshop and interviews with stakeholders to analyse the EBENTO tools developing and implementing the changes and needs recommended by the stakeholders.
WP 4	WP4-1	HYP	Underestimation of the resources for the development of ICT components	Financial	D4.1, D4.2 / M3	LOW	0,375	Iterative development methodology with prioritized functionalities and regular monitoring



								of the work will take place in any stage of the project.
	WP4-2	HYP	Technical barriers in the use of equipment	Technical	D3.1 / M3	LOW	0,5	The consortium has long experience in demonstration sites and is familiar with most of the equipment that will be used in EBENTO. In addition to the partners expertise with the equipment used specific training and professionals will be reached to integrate the equipment
	WP4-3	HYP/ ETRA	Lack of Accuracy of the EBENTO Simulation modules	Technical	D4.2 / M5, M7	LOW	0,875	EBENTO team includes experts with deep knowledge in their domains to ensure the avoidance of assumptions or simplifications during modelling. Additionally, before the simulation modules development starts a minimum accuracy for the application will be establish and agreed. If with the current tools there is no possibility to achieve the minimum accuracy it will be analysed the possibility of integration on EBENTO platform reliable and well positioned on the market simulation tools
	WP4-4	Pilots	Lack of data regarding BIM for the energy simulation in some buildings of the pilots	Technical	D4.1, D5.1, D5.2 / M9, M10	HIGH	1,125	Assumptions regarding the data missed and search in other sources of information as public datasets (TABULA for example) or other building projects in which partners participate on (FORTESIE – sister project, CEMOSA portfolio and BIM experience, TalTech building renovation projects')
WP 5	WP5-1	TalTech	Local pilots face internal resistance to implement the scenarios	Schedule	D5.1, D5.2 / M9, M10	MODE RATE	1,25	Early involvement of the local technical staff of the different pilots to ensure the project scenarios implementation
	WP5-2	ETRA	Pilot deployment constraints and poor quality of data to validate the results.	Technical	D5.2, D6.1, D6.2 / M4	MODE RATE	1,5	Pilot sites are managed by partners that have an extensive knowledge of their characteristics. In addition, pilot partners manage other spaces and data that can be used as alternative, should



								the planned sites and data become unavailable due to unexpected events
	WP5-3	ETRA	Failure during the system integration for demonstration purpose	Schedule	D5.2, D7.3 / M5, M7	LOW	0,375	The implication of all partners in the integration and definition tasks. Constant monitorization of the work done by the technical partner and the coordinator
	WP5-4	VCE	Underestimation of the budget already committed for renovations	Technical	D5.1, D5.2 / M8, M9, M10	HIGH	2,25	Redistribution of budget
	WP5-5	Pilots	Risk for the pilots are not able to achieve all the renovations due to the process of renovation as a whole is out of the scope of the project.	Schedule	D5.1, D5.2 / M9, M10	HIGH	1	Having in advance additional building for renovations in all pilots. If not possible, to have at least some of the renovation process cover to test part of the OSS although the final renovations are not applied
WP 6	WP6-1	VCE	Difficulties in engaging the relevant and motivated end users' from pilots	Schedule	D5.3, D6.2, D7.2 / M10	LOW	0,875	Well defined user requirements definition and baseline, along with cost-benefit validation of the solution. Citizens' engagement experts will follow up on the user requirements activities accomplishment
	WP6-2	IEECP	Difficulties on the work replication (renovation and business models) because of the differences in dwellings characteristics and contractual framework in Europe	Technical	D7.3, D7.2 / M8	MODE RATE	1,3125	Most of the budget allocated for the renovations comes from public funding and pilot partners are committed to search for additional budget if needed. Additionally different stages of actuations are defined to have the opportunity to test the EBENTO platform in all the pilots even if the deeper renovations are no possible
WP 7	WP7-1	ETRA	Unsuccessful exploitation strategy in terms of attracting the relevant stakeholders	Schedule	D7.2 / M22	LOW	0,375	A detailed analysis of the market and the products developed will be done during the project to detect gaps in the market to be covered by the project
	WP7-2	ETRA	Poor dissemination due to lack of results and material	Schedule	D7.2 / M22	LOW	0,875	TBD



	WP7-3	ETRA	Non scientific publications	Schedule	D7.2 / M23	HIGH	1,875	The project partners already working on specific publications. Collaborative publications with other similar projects.
	WP7-4		Missing skills in the consortium when facing innovation and business challenges	Schedule	D7.2/M36	LOW	0,4315	The consortium is composed by experienced partners with complementary competences and access to a wide pool of knowledge and resources. But in any case, the partners who identify the lack of knowledge should be able to embed expert as a worker to fulfil the needs in their task/development on the project. Other possibility should be to search withing the consortium a better partner for develop the relevant task



## 10 Dissemination

The following sections provide the basic procedures and information regarding Dissemination in EBENTO. The complete analysis of the dissemination plans will be covered at D7.1 Plan for Exploitation and dissemination of results.

### 10.1 PUBLICATION PROCEDURE

In order to coordinate the participation of partners in dissemination activities and conferences (both in Europe and outside Europe) and properly notify the Commission of any event, the following criteria apply for the consideration for such activities:

- It is essential that adequate time for considering the publication or participation in an event is given. Therefore, the notification may be circulated as soon as possible and no less than **30 days in advance** of the event. The notification may be submitted to the coordinator making use of the spreadsheet available at the repository. It is advised to upload relevant Call for Papers (CFPs) asap in the repository \WP7\CFP in a Year-Month-Day\_Event format (where the first part indicates the deadline for papers submission).
- The application may include, if possible, a copy of the conference program together with a rationale describing the conference and explaining the proposed role of EBENTO – i.e. networking, presentation of results, poster session, etc.
- Any partner in the consortium can publish its own results without previous permission, it only needs to notify the dissemination manager and fulfil the EC requirements hereafter identified. It is however preferred that common publications arise as result of cooperation among the partners.
- Unless the Commission requests otherwise, any notice or publication by the contractors about the project, including at a conference or seminar, must specify that the project has received research funding from the European Union's Horizon 2020 Research and Innovation Programme and may display the European Commission. When displayed in association with a logo, the European emblem should be given appropriate prominence (contract article 29.4). A pre-print or an abstract of the paper should be sent to the coordinator with the application.
- Any notice or publication by the partners, in whatever form and on or by whatever medium, must specify that it reflects only the author's view and that the Community is not liable for any use that may be made of the information contained therein (contract article 29.5).
- If a result is shared by several partners, the publication needs the approval of all the partners involved. The notification submitted to the PC will have to be circulated to all the partners involved. If there is no response, approval is granted.



- Participants may provide to the coordinator, a copy of the concise written report produced for the project within two weeks of the event.
- The attendee may provide, where possible, a copy of the Conference proceedings or a suitable extract to the coordinator.
- The provisions of the Contract and the Consortium Agreement should be taken into account in dissemination of results of the project.
- A quote like the following one should be included in any dissemination document produced by a partner:
- The authors would like to thank for their support the partners of the European Commission co-funded HE project EBENTO (<http://ebentoproject.eu/>).
- The cost and frequency of the conference attendance should always be minimised and kept in proportion to the size and resources of the Project.
- Conferences out of the EU territory require previous approval of the EC.

## 10.2 PROJECT PUBLICATIONS AND COMMUNICATIONS

All project publications and communications (scientific/technical or not) regardless of their consideration of “dissemination”<sup>1</sup> or “communication”<sup>2</sup> must include the following mention and disclaimer:

	<p><b>Funded by the European Union</b></p>
<p>This project has received funding from the European Union’s Horizon Europe research and innovation programme under the Grant agreement Nº 101079888.</p>	
<p><i>This [insert type of activity] views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union. Neither the European Union nor the granting authority can be held responsible for them</i></p>	

All sorts of external communication are encouraged to promote the EBENTO project and its results. The dissemination strategy of EBENTO is streamlined through a Dissemination Master Plan. The person leading the EBENTO Dissemination and Communication activities (WP7) is:

<sup>1</sup> Where GA ARTICLE 29 — DISSEMINATION OF RESULTS — OPEN ACCESS — VISIBILITY OF EU FUNDING applies

<sup>2</sup> Where GA ARTICLE 38 — PROMOTING THE ACTION – VISIBILITY OF EU FUNDING applies



**Dissemination Manager (DM):** Raquel Castán (ETRA).

Provisions are made to provide coordination, consistency and quality of publications for the benefit of the project's reputation. A second purpose is to give visibility within the project to any public relation activities of the partners.

Any evidence of a dissemination activity must be stored on the project repository (i.e. "Full Paper" version and presentation material) and uploaded in the Participant Portal.

In general, the dissemination activities, including but not restricted to publications and presentations shall be governed by Article 29 of the Grant Agreement. The CA defines also the dissemination rules in section 8.4. Specifically, partners will be responsible for including the EU emblem, acknowledgement of EU funding, and disclaimers.

### 10.2.1 Press Releases and other media contacts

All partners can send out press releases on their own markets.

Press releases should be done to cover all major milestones of the project. As DM, ETRA will coordinate the press releases for the milestones. Partners willing to issue their own press releases must contact first with the DM in order to cross-check if something is already available on the subject.

For all other public project related communication, the use of the EBENTO logo and design is mandatory. When it comes to IPR, all publication must follow the Grant Agreement and the Consortium Agreement.

### 10.2.2 Image rights and quality

Notes on image quality and image rights need to be paid attention at all publication activities. The general recommendation for the image quality is shown in the following table. In the case of picture rights, the origin of the picture as well as the creator must be mentioned. During the project, the author is always responsible for obtaining appropriate image rights, whether for printing publications or web-based publications. The general recommendations are:

<b>Quality</b>	Images for publications, 300 dpi (Size 100 x 150mm) Images for web, 160 dpi (Size 60 x 60mm)
<b>Rights</b>	© Institution/Company or author, origin

Table 16 - Image rights and quality

A specific colour palette will be provided as part of D7.1.

## 10.3 OPEN ACCESS TO EBENTO SCIENTIFIC PUBLICATIONS AND IPR

The Data Management Plan (D1.2) establishes the data management life cycle for the data to be collected, processed and/or generated by EBENTO. As part of making research data Findable, Accessible, Interoperable and re-usable (FAIR), the DMP will include information on the handling of research data during and after the end of the project what data will be collected, processed and/or



generated which methodology and standards will be applied. It will also provide details on the data that will be shared/made open access and how data will be curated and preserved (including after the end of the project).

The following sections provide an introduction to the Open Access Requirements in H2020 and the procedures that the project will establish in D1.2 “Data Management Plan” to guarantee FAIR data.

### Introduction to Open Access to scientific publications in H2020 & HE

The official “**Guidelines on Open Access to Scientific Publications and Research Data in Horizon 2020**” explain what is considered Open Access, and which the ways to achieve it are:

[http://ec.europa.eu/research/participants/data/ref/h2020/grants\\_manual/hi/oa\\_pilot/h2020-hi-oa-pilot-guide\\_en.pdf](http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/hi/oa_pilot/h2020-hi-oa-pilot-guide_en.pdf)

The following extract introduces Open Access, as well as “green” and “gold” modalities of open access provision:

### EBENTO Open Access Publication strategy

The Open Access to publications contractual baseline is provisioned under Article 29.2 of the EBENTO Grant Agreement - i.e. scientific publications in the frame of EBENTO must at least comply with Article 29.2’s provisions:

#### **29.2 Open access to scientific publications**

*Each beneficiary must ensure open access (free of charge online access for any user) to all peer reviewed scientific publications relating to its results.*

*In particular, it must:*

- (a) as soon as possible and at the latest on publication, deposit a machine-readable electronic copy of the published version or final peer-reviewed manuscript accepted for publication in a repository for scientific publications;*

*Moreover, the beneficiary must aim to deposit at the same time the research data needed to validate the results presented in the deposited scientific publications.*

- (b) ensure open access to the deposited publication — via the repository — at the latest:*

- (i) on publication, if an electronic version is available for free via the publisher, or*
- (ii) within six months of publication (twelve months for publications in the social sciences and humanities) in any other case.*

- (c) ensure open access — via the repository — to the bibliographic metadata that identify the deposited publication.*

*The bibliographic metadata must be in a standard format and must include all of the following:*

- the terms “European Union (EU)” and “Horizon 2020”;*
- the name of the action, acronym and grant number;*



- the publication date, and length of embargo period if applicable, and

- a persistent identifier.

### Procedure to ensure Open Access to peer-reviewed scientific publications

Partners will provide Open access to all scientific publications (free of charge online access for any user) using **Self-archiving ('green' open access)**. This is, using one or more 'green' Open Access repositories.

In any case, the 'green' Open Access repositories used must be at least accessible from **OpenAIRE** [2], the **repositories listing** of the European Commission.

D1.2 identifies the 'green' open access repositories to be used – depending on the availability of already existing **institutional repositories by partners**. As default repository, **European Commission's Zenodo** [3] will be used: Zenodo is the “orphan” repository provided by European Commission for this purpose.

**In the case that one or more partners publish a scientific publication in 'gold' open access journals**, are these journals that offer open access against payment from the authors, such publications shall also be self-archived in one of the above listed 'green' open access repositories.

#### Foreword:

This procedure aims to complement, with practical information for researchers, the requirements of the European Commission on Open Access of scientific publications contained in the official *Guidelines on Open Access to Scientific Publications and Research Data in Horizon 2020*<sup>3</sup> [4]

It also acknowledges the instructions added in the Open Access section of the H2020 online manual [5], from which reference to a model amendment to publishing agreement has been introduced to underline the importance of negotiating embargo periods with publishers to meet the expectation of the EC of maximum 6 months of embargo period in Green Open Access model.

#### Disclaimer:

This procedure does not substitute the above official guidelines, and these must be taken into account during the whole process of publishing (they include details, technical requirements, definitions, further recommendations..., that need to be followed and are not contained in this procedure);

This procedure is based on and derives from interpretation of the above referenced official guidelines as published on 25 August 2016 as version 3.2 and the Open Access section of the H2020 online manual up to 03/11/2017; it may need to be updated in further versions of the guidelines or other guiding documents on open Access are provided by the European in the future.

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<sup>3</sup> EUROPEAN COMMISSION Directorate-General for Research & Innovation. H2020 Programme Guidelines on Open Access to Scientific Publications and Research Data in Horizon 2020, version 3.1 25 August 2016 [http://ec.europa.eu/research/participants/data/ref/h2020/grants\\_manual/hi/oa\\_pilot/h2020-hi-oa-pilot-guide\\_en.pdf](http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/hi/oa_pilot/h2020-hi-oa-pilot-guide_en.pdf)



**Scope of the open access obligation:**

Peer-reviewed articles are the main focus of the open access obligation. Other formats as monographs, conference proceedings, book chapters, or any other type of outputs are encouraged to be open access, although they are not the main focus of the mandate.<sup>4</sup>

**Selecting/negotiating with publishers:**

Thus, before submitting a paper to any journal or congress, etc., it is necessary to:

**1<sup>st</sup>: Know if the contract (copyright license agreement) with the publisher permits us to open the publication, immediately or within 6 months;** and in case that there is an embargo period allowing us to open the publication not immediately but in a given time not higher than 6 months, know which is the exact date when the embargo period starts (The OpenAIRE helpdesk team says: “If there is no explicit information from the editor regarding the embargo to the hardcopy, generally and by default the embargo period starts on the 1st online publishing.”).

“To provide support concerning compliance with Horizon 2020 embargo periods the Commission offers a **model amendment to publishing agreement** [6], which are often signed between authors and publishers. This model is not mandatory but reflects the obligations for the beneficiary under the H2020 grant agreements. It can be supplemented by further provisions agreed between the parties, provided they are compatible with the Grant Agreement. The Commission/Agency takes no responsibility for the use of this model”<sup>5</sup>.

**2<sup>nd</sup>: Know which version of the paper it is allowed to make open:**

- “Pre-print” version (it is a draft paper as it is before the peer review). **The European Commission does not accept pre-print versions as open access publications**
- “Accepted” or “post-print” version (final peer-reviewed manuscript accepted for publication). The EC accepts it
- “Published” or “editor’s” version (it is the version as published by the editor, i.e., designed with the layout of the journal or book published). The EC accepts it

**3<sup>rd</sup>: Know if there is any fee (“Article processing charges”)** that the author has to pay to the editor to be able to open the publication. **This cost is eligible in H2020**

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<sup>4</sup> See annotations to ARTICLE 29 in annotated model GA [http://ec.europa.eu/research/participants/data/ref/h2020/grants\\_manual/amga/h2020-amga\\_en.pdf](http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/amga/h2020-amga_en.pdf)

<sup>5</sup> [http://ec.europa.eu/research/participants/docs/h2020-funding-guide/cross-cutting-issues/open-access-data-management/open-access\\_en.htm](http://ec.europa.eu/research/participants/docs/h2020-funding-guide/cross-cutting-issues/open-access-data-management/open-access_en.htm)



**4<sup>th</sup>: Know is there is any other clause in the contract that may affect in any way Open Access publishing.**

**5<sup>th</sup>: Keep the agreement and make it available to the co-authors as well as the final peer reviewed version of the publication.**

“In all cases, the Commission encourages authors to retain their **copyright** and grant adequate licences to publishers. Creative Commons offers useful licensing solutions. This type of licence is a good legal tool for providing open access in its broadest sense.”<sup>6</sup>

## 10.4 EBENTO WEB SITE

EBENTO web site is <http://ebentoproject.eu>

All the web site transactions are being logged, in order to track any kind off attack, wrong usage or similar situations.

### 10.4.1 Web site public area

It includes a description of the Project according to the public information of the DoA.

The proposed sections are the following ones:

- Project. This section is the home page and contains a general and brief description of the project including three subsections:
  - Project objectives.
  - Consortium.
  - Work plan.
- News. This section will allow the publication of existing news directly related to EBENTO objectives and technologies.
- Events. This section will contain all the events internal and external to the project that will keep a tight relation with EBENTO, including the project workshops. Before a workshop takes place, the section will contain the workshop agenda, the registration form and the logistics information. After the workshop, the agenda will contain links to each one of the presentations made. There will be one section per workshop. This section will be fed with the table in Annex C.

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<sup>6</sup> EUROPEAN COMMISSION Directorate-General for Research & Innovation. H2020 Programme Guidelines on Open Access to Scientific Publications and Research Data in Horizon 2020, version 3.1 25 August 2016 [http://ec.europa.eu/research/participants/data/ref/h2020/grants\\_manual/hi/oa\\_pilot/h2020-hi-oa-pilot-guide\\_en.pdf](http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/hi/oa_pilot/h2020-hi-oa-pilot-guide_en.pdf)



- Downloads. This section will make available all EBENTO public documents. It will present four sections:
  - EBENTO brochure. The electronic version of the brochure will be available in the website in pdf format.
  - EBENTO presentation. A very brief presentation on EBENTO context, objectives, concept and contact details, in pdf format will be available for quick dissemination of the project.
  - Public deliverables. All the project public deliverables will be published in this section duly secured.
  - Technical papers. All the technical papers published by the EBENTO consortium, in the context of the project, will be published in this section.
- Related Links. Links of interest for the project.
- User group. This section will allow the creation of EBENTO User Group. The members of the user group will be invited via e-mail to the project workshops and will also receive the electronic project newsletters. The section will include the electronic form to become a member of the user group.
- Contact EBENTO. Coordinator brief profile and contact details.

#### 10.4.2 Private area and repository

The web site counts with a private area accessible to the members of the consortium that enables the publication of events and news, and to upload publications and deliverables. The management of this area is responsibility of the Dissemination Manager.

In addition, as described in section 5.4, each partner may access a project repository where documents, deliverables, templates, etc. are stored and exchanged.

In order to access the project repository, each project participant has a user name and a password, providing unrestricted access to all the folders and files.

These user names and passwords must be securely safeguarded by all the partners, and not provided in any mean to any third party or organization not contractually bound to the project.

In the case, by error, accident or any other situation, the user name and password are lost or known by any person or entity not related to the project, the partner who knows it must inform immediately the rest of the Consortium, by means of an e-mail to the PC, so the parameters are changed urgently, in order to warranty the confidentiality and any possible IPR from the partners or project itself.

## 11 IPR management in EBENTO

The IPR strategy of EBENTO will follow easy stages (Figure 7) that will be completed and extended during the whole project and in relation with the exploitation activities.



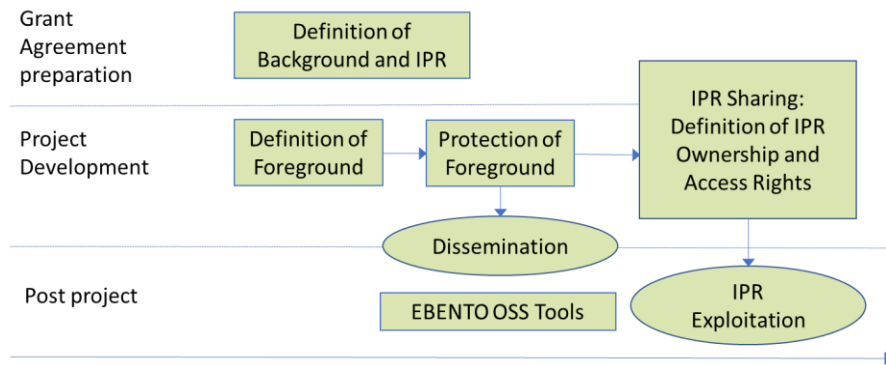


Figure 7 IPR Management overview

According to EBENTO Grant Agreement, the project methodology and results will be published, but products and models developed will be evaluated in WP7 according to the exploitation strategy define for each of the EBENTO Key Exploitable Results.

To go from the GA preparation to the post project stages, during the whole duration of the project different activities will be carried out to understand the IPR of each development, running in parallel with the Exploitation activities and KERs definition.



During the first years for the project, and before the final KERs list, the activities were focused on main tools definition for compiling all the relevant information from the partners. That implies:

- IPR repository: Internal repository with the main innovations of the project updated along the project lifetime.
- KER priority and Risk Matrix: Template preparation for completing the KERs information when them will be finally defined.
- Partners innovation plan including relevant information of exploitation, IPR and more as describe in Table 17

Partner- Innovation Plan	
Description including:	Background: Foreground: Partner - objectives within EBENTO project:



Exploitation Targets	By the end of the project: After the project's lifetime:
Intangible assets (IA) & Intellectual Capital (IC)	
IPR foreseen	
Targeted end users	

Table 17 Innovation plan

It is needed to mention that the IPR strategy is highly linked to the exploitation definition as depending on the exploitation strategy the IPR strategy will be defined, linking the Key Exploitable Results, with the way the partners expect to exploit them. In that context, and considering the specific task for exploitation, the IPR strategy definition will be deeper analysed in T7.2 withing the exploitation workshops the consortium will carried out during the last phase of the project.

Specifically, as indicate in D7.1, the exploitation strategy involves the IPR definition and as part of the exploitation strategy, the IPR will be considered, including the characterization of the KERs for which each owner will define their strategy for IPR protection.

Finally, the reporting of the final IPR strategy will be included on D1.1 update in M18 and M36 as well as in D7.1 – Plan for exploitation and dissemination of results that will be update in M36 with the final results for exploitation.

## 11.1 LIST OF DEVELOPMENTS AND ITS IPR UNTIL M18

Following the first list of components that will be defined as KERs with the IPR strategy defined until M18. This list is a 1<sup>st</sup> draft based on the results achieved until M18. This section will be updated with the final IPR strategy for the different components and KERs at the end of the project (M36) and in accordance with the information included on D7.1 in which the exploitation results and update from previous version will be done.



#	WP#	Name	Short description	Nature of the result	Organization directly contributing to development	Background needed to use this foreground	Rights to use the foreground	Priority	Timing to start the exploitation process
1	WP5	EBENTO OSS	General platform including the needed modules for management, simulation and monitoring of renovation processes and EnPCs	Software	ETRA, HYP	Modules included on the OSS	License	High	2 years after the project ended
2	WP4	EBENTO DSS4Ren	To evaluate the energy performance of the building in its initial condition and after the application of different renovation scenarios	Software	HYP, CEMOSA	Energy + tool	TBD	High	2 years after the project ended
3	WP4	EnPC Decision Support system	Module for managing an creation of energy performance contracts into the OSS	Software	ETRA, IEACP	Contract typology	Pay yearly use fee for access rights	High	2 years after the project ended
4	WP4	EBENTO ECE	This component is in charge of evaluating monitoring the current situation of dwellings, and generating information a	Software	ETRA	Monitoring tools from ETRA previous projects	Software license and specific additional services encompassing consultation, implementation, extension, training and support- to deploy and adapt the product to customer's needs	High	2 years after the project ended
5	WP4	Dynamic Maps	This tool shows in a 3D map the most relevant information regarding the energy efficiency of building in a city including the potential of renovation and possible enhancement for Energy performance Certificates	Software	ETRA	Cadastre information and Energy Performance certificates	Available for Public Institutions (during the first years of the project) to incentive the use of the OSS.	High	2 years after the project ended
6	WP4	EBENTO Common Data Environment	The EBENTO Common Data environment (CDE) is a cloud-based data management solution for data validation, storing,	Software	HYP	HYP expertise	TBD	High	2 years after the project ended



			versioning, quality, and consistency checking.						
7	WP4	EBENTO IoT Data Platform	This component oversees organizing the data received from IoT devices and smart meters deployed in the houses and storing it in a common format understandable for EBENTO modules	Software	ETRA	ETRA expertise	Software licensed included on the OSS. Exploitable independently	High	2 years after the project ended
8	WP3	Contract typology definition	New contract type based on the contract template defined for fitting the OSS and to be modifiable based on comfort or demand response mechanisms	Documentation (guidelines, specification...)	IEECP	Current contracts and framework for EnPCs	NA	Medium	2 years after the project ended
9	WP2	Stakeholder interviews	Feedback and analysis of stakeholders and experts regarding future of EnPC, barriers and solutions for incentive their use	Other	Pilot partners and researchers	NA	Consent form	Low	Right after and during the project

Table 18 IPR developments identification until M18



## 12 References and Acronyms

### 12.1 REFERENCES

1. **ALFRESCO**. [Online] <https://www.alfresco.com>.

### 12.2 ACRONYMS

Acronyms List	
APC	Author Processing Charges
CFP	Call for Papers
CP	Consortium Plenary
DCOM	Dissemination and Communication Manager
DMP	Data Management Plan
DoA	Description of Action
FAIR	Findable, Accessible, Interoperable and re-usable
HLU	High Level Use case
OA	Open Access
PC	Project Coordinator
PPR	Project Periodic Report
PSC	Project Steering Committee
TM	Technical Manager
WP	Work Package

TABLE 19 –Acronyms

