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28 November 2024

Deliverable 1.1: Project Management handbook

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Deliverable details

Title	WP	Version
Deliverable 1.1: Project Management handbook	1	1.0

Contractual delivery date	Actual delivery date	Delivery type*	Dissemination**
30/11/2024 (M3)	30/11/2024 (M3)	R	PU

* Delivery type: R: Document, report; DEM: Demonstrator, pilot, prototype; DEC: Websites, patent fillings, videos, etc; DMP: Data management plan.
** Dissemination Level: PU - Public; SEN – Sensitive, limited under the conditions of the Grant Agreement.

Author(s)	Organization
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Version	Date	Person	Action	Status***
0.1	01.10.2024	Lola Alacreu (ETRA)	Document created	Draft
0.2	15.10.2024	Maria Provecho (ETRA)	Contributions in section 9	Draft
0.3	15.10.2024	Dune Sebilleau (TRIALOG)	Contributions in section 10	Draft
0.4	11.11.2024	Kashyap Shievam (FHOOE), Pokorná Zdeňka (CEZ), Katerina Drivakou (UBITECH), Raúl Peña Gracia (i-DE), Selene Liverani (E.DSO), Covadonga Pérez (InnEurope)	Peer review of the document	Draft
1.0	30.11.2024	Lola Alacreu (ETRA)	Final version of the document	Final

***Status: Draft, Final, Approved, Submitted (to European Commission).

KEYWORDS

Work plan, handbook, management, communication, notification, meetings, risks, KPI.

COPYRIGHT STATEMENT

EXECUTIVE SUMMARY

This project management handbook defines how the ECLIPSE 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.

The purpose of this document is, therefore, to provide the guidelines, information and recommendations needed in order to facilitate the cooperation and exchange of information among partners in an efficient and agile way.

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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 successful project implementation. 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. This facilitates a clear visualization of project management timelines.

The project management handbook 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 ECLIPSE. 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 ECLIPSE 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 the team leaders within each organization, researchers and administrative personnel. It aims to provide a clear vision of what the project's objectives are 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.

1.3. STRUCTURE OF THE DOCUMENT

This deliverable is organized in eleven sections:

- Section 1. Introduction: Explains the goals of the document.
- Section 2: Project Summary: Highlights essential information about the project.
- Section 3. Work Plan: Visual representation of project workflows and dependencies.
- Section 4. Communication Guidelines: Best practices, formats, and conventions for document exchange.
- Section 5. Meetings: Procedures for organizing meetings.
- Section 6. Reporting Procedure: Requirements and guidelines for reports, documents, biannual and Periodic Reports, presentations and posters.
- Section 7. Quality Management: Procedures to ensure project outputs meet standards.
- Section 8. Risk Management: Clarifies terminology and risk types and assigns roles in managing risks.
- Section 9. Dissemination: Defines standards for project-related publications.
- Section 10. KPI Management: Identifies metrics to evaluate project success.
- Section 11. Acronyms: Provides a glossary of terms and abbreviations used throughout the document.

2. PROJECT SUMMARY

2.1. ECLIPSE KEY FACTS

Topic: DIGITAL-2023-DEPLOY-BESTUSE-TECH-04-ENERSAVING: EU Energy saving reference framework.

Type of Action: DIGITAL-SIMPLE.

Project start: 1 September 2024.

Duration: 24 months.

Project Coordinator: ETRA INVESTIGACIÓN y DESARROLLO S.A.

2.2. ECLIPSE IN SHORT

The objective of ECLIPSE project is the implementation and demonstration of the Common European Reference Framework (CERF) for energy consumers applications across the EU, enabling voluntary energy consumption reductions and load shifting, based on recommendations, strategies, and incentives, promoting sustainable energy consumption behaviour and empowerment of final consumers.

ECLIPSE project will define a set of rules and conditions for the development of new energy consumers applications and to improve of existing ones. These applications will provide to the final consumers with simple, useful and user-friendly information on energy savings, and broader benefits (such as a reduction in CO_2 and other financial and social incentives) and at the same time reinforcing the stability and resilience of electricity grids, by means of consumer flexibility (e.g., through smart EV-charging, shifting heating loads, self-consumption, etc.).

The project solutions will be deployed and demonstrated in 16 EU countries, being potentially replicated across the whole European Union, ensuring interoperability with third-party systems, while respecting the current regulatory framework and any existing competitive application offerings.

2.3. ECLIPSE CONSORTIUM

ECLIPSE consortium comprises 23 partners from 13 different countries, composed of a balanced team of complementary organisations.

- 7 DSO (Iberdrola, Elektro Ljubljana, CEZ, E-REDES, METLEN, TAURON, HEDNO[1]),
- 4 TSO (ESO, TSOC, HOPS, RD NESTER),
- 2 energy services companies/aggregator (VOLTALIS and CHECKWATT),
- 8 Energy Engineering/consultancy and R&D entities (ETRA I+D, INNEUROPE, TRIALOG, CINTECH, UBITECH ENERGY, FHOO, D4G, NUSTPB[2]),
- 1 European and 1 national Energy companies association (EDSO and AELEC).

2.4. 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 for subjective interpretation.

The work to be done within ECLIPSE 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 1 .

[1] HEDNO will be officially part of the consortium from 1st January 2025.
[2] NUSTPB will be officially part of the consortium from 1st January 2025.

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 partners, administering project resources and project spending, managing the overall ethical and gender issues, etc.

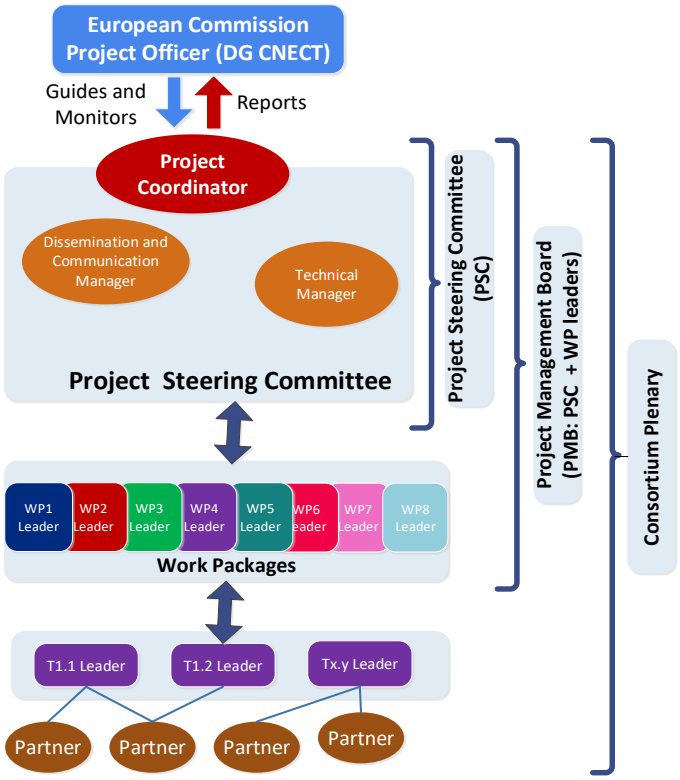


Figure 1. ECLIPSE Management Structure

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.). **WP leaders (WPL)** are responsible of activities and objectives specified in the project plan, as well as for coordinating with the deliverable leaders to submit the deliverables on time under their respective WPs 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 task leaders. Together with the PSC the WPLs form the **Project Management Board (PMB)** which will convene twice a month to discuss the progress of the individual WPs. The members of PMB are listed in Table 1. 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.

Table 1. Project Management Board.

Project Management Board			
Project Coordinator	Antonio Marqués (ETRA)	WP3 leader	Dune Sebilleau (TRIALOG)
Deputy Project Coordinator (WP1 leader)	Lola Alacreu (ETRA)	WP4Leader	Lola Alacreu (ETRA)
Technical Manager	Dune Sebilleau (TRIALOG)	WP5 leader	Katerina Drivakou (UBITECH ENERGY)
DCOM	María Provecho (ETRA)	WP6 Leader	Christoph Schaffer (FHOO)
WP2 Leader	Raúl Peña (I-DE)	WP7 Leader	Paula Peiró (INNEUROPE)

3. ECLIPSE WORKPLAN

ECLIPSE work plan is divided into 8 Work Packages (WPs). **WP1 "Project management and coordination" and WP8 "Ethics requirements" (M1-M24, ETRA),** led by ETRA as Project Coordinator with TRIALOG support as Technical Manager, guaranteeing a correct project progress. In **WP2 "CERF use cases, requirements and services" (M1-M12, i-DE)** all partners of the project (end users, researchers, technical providers, etc.) will participate in a collaborative and iterative way in the definition of the use cases, requirements and KPIs, that will be the basis for the rest of the project activities. Then, the technical WPs, which design and develop the project results are in **WP3 "Architecture of a scalable and interoperable European open-source CERF and data sets" (M1-M15, TRIALOG) and WP4 "Design and development of CERF and APIs" (M4-M24, ETRA).** Then, in **WP5: "Preparation, coordination and monitoring of demonstration activities" (M7-M24, UBITECH ENERGY),** all the project results will be integrated and demonstrated in the project pilot sites. **WP6 "User satisfaction assessment and analysis of the regulatory framework" (M13-M24, FHOO)** will focus on impact assessment and the definition of the replication strategies. In **WP7 "Dissemination, communication and exploitation activities" (M1-M24, INNEUROPE)** the consortium will setup and coordinate a robust communication, dissemination and exploitation strategies guaranteeing outcomes promotion and exploitation.

3.1. ECLIPSE PERT

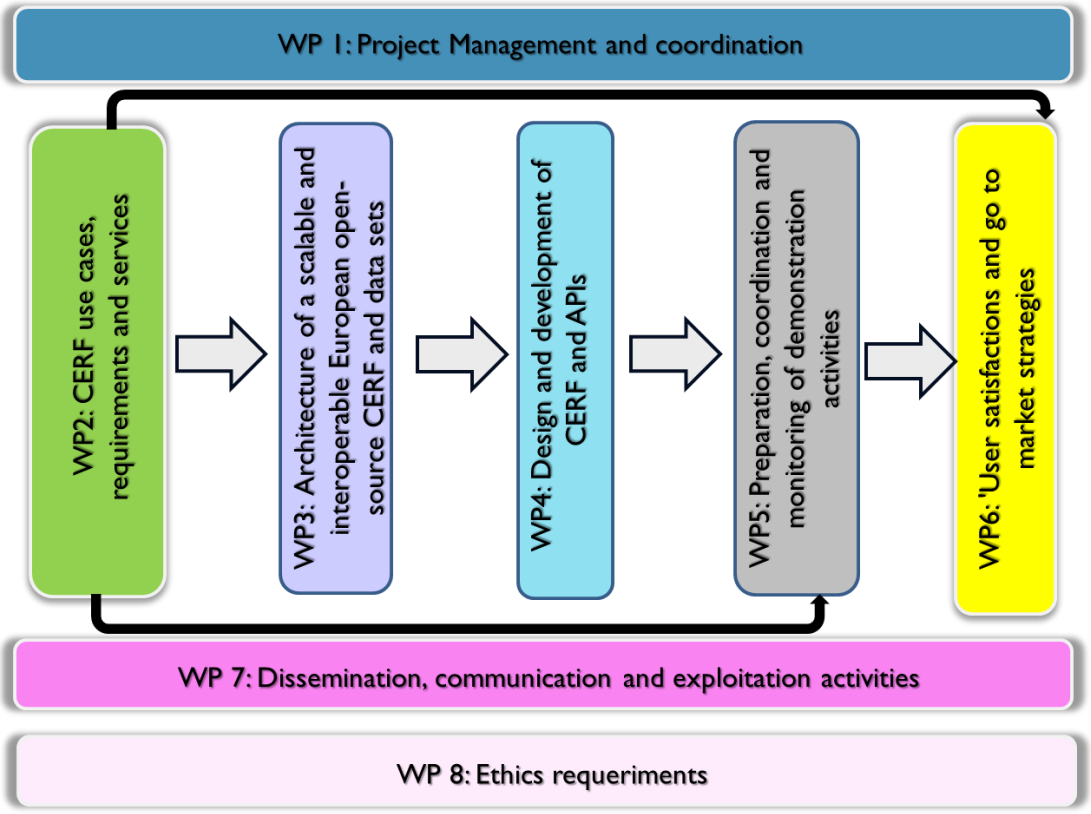


Figure 2. ECLIPSE PERT.

3.2. ECLIPSE GANTT

Table 2. ECLIPSE GANTT

		M1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12	M13	M14	M15	M16	M17	M18	M19	M20	M21	M22	M23	M24
WP1	**Project management and coordination**																								
1.1	Administrative and Financial Management																								
1.2	Risk management and Quality assurance																								
1.3	Data management plan and RRI																								
WP2	**CERF use cases, requirements and services**																								
2.1	Analysis of the good practices from existing applications and services already available in the market.																								
2.2	relevant stakeholders																								
2.3	Definition and consolidation of CERF requirements																								
WP3	**Architecture of a scalable and interoperable European open-source CERF and data sets**																								
3.1	Specifications of suitable data sets and digital environment																								
3.2	Definition of the architecture of a scalable and interoperable European open-source CERF																								
3.3	Definition of standard interfaces and protocols of the CERF																								
3.4	Data protection capabilities and methods																								
WP4	**Design and development of CERF and APIs**																								
4.1	Open-source CERF development plan																								
4.2	Development of the CERF for consumer applications based on Machine learning tools and IA																								
4.3	User interface apps development and support to App developers																								
4.4	Verification, validation and maintenance of the CERF																								
WP5	**Preparation, coordination and monitoring of demonstration activities**																								
5.1	Integration, deployment and adaptation activities																								
5.2	Awareness and engagement activities to motivate stakeholders' active involvement																								
5.3	Demonstration activities by real pilots																								
5.4	Simulations in virtual pilots																								
WP6	**User satisfaction assessment and analysis of the regulatory framework**																								
6.1	Analysis of the regulatory framework and recommendations to policymakers																								
6.2	User satisfaction assessment																								
6.3	Innovative business models and socioeconomic and environmental impact of CERF																								
6.4	Replication and expansion strategies																								
WP7	**Dissemination, communication and exploitation activities**																								
7.1	Dissemination and collaboration with other stakeholders																								
7.2	Communication activities and adoption campaigns leading to widespread adoption																								
7.3	Exploitation plans and IPR activities																								
WP8	**Ethics requeriments**																								

3.3. WORK BREAKDOWN STRUCTURE (WBS)

3.3.1. ECLIPSE TASKS BREAKDOWN

Table 3. ECLIPSE tasks, schedule, involved partners and deliverable.

WP	Task	Start	End	Leader	Related deliverable
1	1.1 Administrative and financial management	01/09/2024	31/08/2026	ETRA	D1.1 - Project Management handbook [M3] D1.2 – Data Management Plan [M3]
1	1.2 Risk management and Quality assurance	01/09/2024	31/08/2026	TRIALOG	D1.1 - Project Management handbook [M3] D1.2 – Data Management Plan [M3]
1	1.3 Data management plan and RRI	01/09/2024	31/08/2026	ETRA	D1.1 - Project Management handbook [M3] D1.2 – Data Management Plan [M3]
2	2.1 Analysis of the good practices from existing applications and services already available in the market and of current legal framework	01/09/2024	28/02/2025	ETRA	D2.1 - Analysis of existing energy monitoring applications and services in the market and of the legal framework [M6]
2	2.2 Co-creation of project use-cases and energy services in collaboration with all the relevant stakeholders	01/09/2024	31/08/2025	I-DE	D2.2 - Energy services analysis, use cases, and CERF requirements [M12]
2	2.3 Definition and consolidation of CERF requirements	01/09/2024	31/08/2025	ETRA	D2.2 - Energy services analysis, use cases, and CERF requirements [M12]
3	3.1 Specifications of suitable data sets and digital environment	01/09/2024	30/11/2025	TRIALOG	D3.1 - CERF architecture specification and ECLIPSE interoperability profiles [M15]
3	3.2 Definition of the architecture of a scalable and interoperable European open-source CERF	01/09/2024	30/11/2025	TRIALOG	D3.1 - CERF architecture specification and ECLIPSE interoperability profiles [M15]

3	3.3 Definition of standard interfaces and protocols of the CERF	01/09/2024	30/11/2025	TRIALOG	D3.1 - CERF architecture specification and ECLIPSE interoperability profiles [M15]
3	3.4 Data protection capabilities and methods	01/09/2024	30/11/2025	TRIALOG	D3.2 – Specific Data Protection analysis [M15]
4	4.1 Open-source CERF development plan	01/12/2024	31/08/2025	ETRA	D4.1 - ECLIPSE CERF for Energy Saving applications_V1 [M12]
4	4.2 Development of the CERF for consumer applications based on Machine learning tools and IA	01/12/2024	31/08/2026	ETRA	D4.2 - ECLIPSE CERF for Energy Saving applications_V2 [M24]
4	4.3 User interface apps development and support to App developers	01/12/2024	31/08/2026	ETRA	D4.2 - ECLIPSE CERF for Energy Saving applications_V2 [M24]
4	4.4 Verification, validation and maintenance of the CERF	01/06/2025	31/08/2026	ETRA	D4.2 - ECLIPSE CERF for Energy Saving applications_V2 [M24]
5	5.1 Integration, deployment and adaptation activities	01/03/2025	30/11/2025	UBITECH ENERGY	D5.1 - Pilot sites Integration, deployment and engagement activities [M15]
5	5.2 Awareness and engagement activities to motivate stakeholders' active involvement	01/03/2025	31/08/2026	UBITECH ENERGY	D5.2 - Demonstration activities result [M24]
5	5.3 Demonstration activities by real pilots	01/09/2025	31/08/2026	UBITECH ENERGY	D5.2 - Demonstration activities result [M24]
5	5.4 Simulations in virtual pilots	01/02/2026	31/08/2026	UBITECH ENERGY	D5.2 - Demonstration activities result [M24]
6	6.1 Recommendations to policymakers to facilitate the adoption of ECLIPSE results	01/09/2025	31/08/2026	FHOO	D6. 2 – Definition of replication and scaling-up guidelines and policy makers recommendations [M24]
6	6.2 User satisfaction assessment and social impact	01/09/2025	31/08/2026	FHOO	D6. 1 – Economic and socioeconomic impact assessment [M24]

6	6.3 Innovative business models and economic and environmental impact of CERF	01/09/2025	31/08/2026	INNEURO	D6. 1 – Economic and socioeconomic impact assessment [M24]
6	6.4 Replication and expansion strategies	01/03/2026	31/08/2026	EDSO	D6. 2 – Definition of replication and scaling-up guidelines and policy makers recommendations [M24]
7	7.1 Dissemination and collaboration with other stakeholders	01/09/2024	31/08/2026	ETRA	D7. 1 – Dissemination, Exploitation and Communication Plan [M3] D7. 3 - Dissemination, Communication and exploitation activities [M24]
7	7.2 Communication activities and adoption campaigns leading to widespread adoption	01/09/2024	31/08/2026	ETRA	D7. 1 – Dissemination, Exploitation and Communication Plan [M3]
7	7.3 Exploitation plans and IPR activities	01/09/2024	31/08/2026	INNEURO	D7.2 - Individual exploitation strategies [M6] D7. 3 - Dissemination, Communication and exploitation activities [M24]
8	8.1 Ethics requirements	01/09/2024	31/08/2026	ETRA	D8.1 - OEI - Requirement No. 1 [M4]

3.3.2. PROJECT EFFORT IN PERSON-MONTHS

3.3.2.1. EXTENDED PM BREAKDOWN (PER TASK)

Table 4. ECLIPSE Effort per WP, task and partner.

Name	WP1	WP2				WP3					WP4					WP5					WP6					WP7				TOTAL
		Total WP2	T2.1	T2.2.	T2.3.	Total WP3	T3.1	T3.2	T3.3	T3.4	Total WP4	T4.1	T4.2	T4.3	T4.4	Total WP5	T5.1	T5.2	T5.3	T5.4	Total WP6	T6.1	T6.2	T6.3	T6.4	Total WP7	T71	T7.2	T7.3	
ETRA	**30,0**	24,0	**7,0**	7,0	**10,0**	28,0	7,0	7,0	7,0	7,0	**59,0**	**15,0**	**15,0**	**15,0**	**14,0**	24,0	9,0	5,0	5,0	5,0	7,0	1,0	2,0	2,0	2,0	20,0	**8,0**	**8,0**	4,0	**192,0**
INNEUROPE	2,0	3,0	1,0		2,0	0,0					5,0				5,0	8,0	2,0	2,0	2,0	2,0	11,0	2,0	2,0	**5,0**	2,0	**31,0**	7,0	7,0	**17,0**	**60,0**
EDSO	0,5	1,5	0,5	0,5	0,5	0,0					0,0					0,0					6,5	2,0	0,5		**4,0**	2,0	1,5	0,5		**10,5**
TRIALOG	12,0	9,0	3,0	3,0	3,0	**36,0**	**9,0**	**9,0**	**9,0**	**9,0**	12,0	3,0	3,0	3,0	3,0	11,0	2,0	2,0	2,0	5,0	3,0			1,5	1,5	7,0	3,0	1,0	3,0	**90,0**
UBITECH	2,0	9,0	3,0	3,0	3,0	14,0	4,0	4,0	3,0	3,0	14,0	3,0	3,0	3,0	5,0	**40,0**	**10,0**	**10,0**	**10,0**	**10,0**	6,0	2,0	2,0	1,0	1,0	6,0	2,0	2,0	2,0	**91,0**
D4G	2,0	2,0		1,0	1,0	4,0	1,0	1,0	1,0	1,0	3,0	0,0	1,0	1,0	1,0	16,0	5,0	5,0	5,0	1,0	4,0	1,0	1,0	1,0	1,0	3,0	1,0	1,0	1,0	**34,0**
FHOOE	2,0	11,0	**7,0**	2,0	2,0	14,0	3,0	4,0	4,0	3,0	8,0	2,0	2,0	2,0	2,0	16,0	5,0	5,0	5,0	1,0	**13,0**	**6,0**	**5,0**	1,0	1,0	4,0	1,0	2,0	1,0	**68,0**
Iberdrola	2,0	**27,0**	6,0	**15,0**	6,0	0,0					2,0				2,0	26,0	8,0	8,0	8,0	2,0	12,0	3,0	3,0	3,0	3,0	6,0	2,0	2,0	2,0	**75,0**
EDG West																														**0,0**
EL	2,0	9,0	3,0	3,0	3,0	0,0					2,0				2,0	19,0	6,0	6,0	6,0	1,0	9,0	2,0	2,0	2,0	3,0	6,0	2,0	2,0	2,0	**47,0**
ESO	2,0	9,0	3,0	3,0	3,0	0,0					2,0				2,0	19,0	6,0	6,0	6,0	1,0	9,0	2,0	2,0	2,0	3,0	6,0	2,0	2,0	2,0	**47,0**
IBT																														**0,0**
TSOC	2,0	9,0	3,0	3,0	3,0	0,0					2,0				2,0	19,0	6,0	6,0	6,0	1,0	9,0	2,0	2,0	2,0	3,0	6,0	2,0	2,0	2,0	**47,0**
CINTECH	2,0	9,0	3,0	3,0	3,0	0,0					2,0				2,0	19,0	6,0	6,0	6,0	1,0	9,0	2,0	2,0	2,0	3,0	6,0	2,0	2,0	2,0	**47,0**
METLEN	2,0	9,0	3,0	3,0	3,0	0,0					2,0				2,0	19,0	6,0	6,0	6,0	1,0	9,0	2,0	2,0	2,0	3,0	6,0	2,0	2,0	2,0	**47,0**
VOLTALIS	2,0	9,0	3,0	3,0	3,0	0,0					2,0				2,0	19,0	6,0	6,0	6,0	1,0	9,0	2,0	2,0	2,0	3,0	6,0	2,0	2,0	2,0	**47,0**
CheckWatt	2,0	9,0	3,0	3,0	3,0	0,0					2,0				2,0	19,0	6,0	6,0	6,0	1,0	9,0	2,0	2,0	2,0	3,0	6,0	2,0	2,0	2,0	**47,0**
E-REDES	2,0	9,0	3,0	3,0	3,0	8,0	2,0	2,0	2,0	2,0	8,0	2,0	2,0	2,0	2,0	16,0	5,0	5,0	5,0	1,0	6,0	1,0	1,0	2,0	2,0	6,0	2,0	2,0	2,0	**55,0**
HOPS	2,0	9,0	3,0	3,0	3,0	0,0					2,0				2,0	19,0	6,0	6,0	6,0	1,0	9,0	2,0	2,0	2,0	3,0	6,0	2,0	2,0	2,0	**47,0**
CEZ	2,0	9,0	3,0	3,0	3,0	6,0	2,0	2,0	1,0	1,0	2,0				2,0	16,0	5,0	5,0	5,0	1,0	7,0	1,0	1,0	2,0	3,0	5,0	2,0	2,0	1,0	**47,0**
RD NESTER	2,0	7,0	2,0	2,0	3,0	2,0	2,0				2,0				2,0	19,0	6,0	6,0	6,0	1,0	9,0	2,0	2,0	2,0	3,0	6,0	2,0	2,0	2,0	**47,0**
AELEC	2,0	9,0	3,0	3,0	3,0	0,0					2,0				2,0	19,0	6,0	6,0	6,0	1,0	9,0	2,0	2,0	2,0	3,0	6,0	2,0	2,0	2,0	**47,0**
TAURON	2,0	9,0	3,0	3,0	3,0	0,0					2,0				2,0	20,0	6,0	6,0	6,0	2,0	9,0	2,0	2,0	2,0	3,0	6,0	2,0	2,0	2,0	**48,0**
UPB	2,0	10,0	3,0	3,0	4,0	10,0	3,0	3,0	2,0	2,0	12,0	3,0	3,0	3,0	3,0	20,5	6,5	6,0	6,0	2,0	9,0	2,0	2,0	2,0	3,0	6,0	2,0	2,0	2,0	69,5
HEDNO	1,0	3,0		1,5	1,5											4,0				4,0	3,0				3,0	0,0				11,0
TOTAL	**81,5**	**214,5**	**68,5**	**74**	**72**	**122**	**33**	**32**	**29**	**28**	**147**	**28**	**29**	**29**	**61**	**408**	**124**	**119**	**119**	**46**	**187**	**43**	**41,5**	**42,5**	**59,5**	**162**	**53,5**	**51,5**	**57**	**1321**

3.3.2.2. SUMMARISED PM BREAKDOWN (PER WORK PACKAGE)

Table 5. ECLIPSE PM breakdown per WP

Name	WP1	WP2	WP3	WP4	WP5	WP6	WP7	TOTAL
ETRA	**30**	24	28	**59**	24	7	20	**192**
INNEUROPE	2	3	0	5	8	11	**31**	**60**
EDSO	1	2	0	0	0	7	2	**11**
TRIALOG	12	9	**36**	12	11	3	7	**90**
UBITECH	2	9	14	14	**40**	6	6	**91**
D4G	2	2	4	3	16	4	3	**34**
FHOOE	2	11	14	8	16	**13**	4	**68**
Iberdrola	2	**27**	0	2	26	12	6	**75**
EL	2	9	0	2	19	9	6	**47**
ESO	2	9	0	2	19	9	6	**47**
TSOC	2	9	0	2	19	9	6	**47**
CINTECH	2	9	0	2	19	9	6	**47**
METLEN	2	9	0	2	19	9	6	**47**
VOLTALIS	2	9	0	2	19	9	6	**47**
CheckWatt	2	9	0	2	19	9	6	**47**
E-REDES	2	9	8	8	16	6	6	**55**
HOPS	2	9	0	2	19	9	6	**47**
CEZ	2	9	6	2	16	7	5	**47**
RD NESTER	2	7	2	2	19	9	6	**47**
AELEC	2	9	0	2	19	9	6	**47**
TAURON	2	9	0	2	20	9	6	**48**
UPB	2	10	10	12	21	9	6	**70**
HEDNO	1	3			4	3		**11**
TOTAL	**81,5**	**214,5**	**122**	**147**	**407,5**	**186,5**	**162**	**1321**

4. 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 the e-mail communication process easier.

4.1. 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 Project Coordinator (PC).

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

- ECLIPSE Consortium Plenary (CP) where the administrative, financial and coordination contact list, containing all administrative and technical contacts for all partners is found:
  - all@ECLIPSE-project.eu
- WP(s) mailing list, with all personnel involved in each company:
  - WP1@ECLIPSE-project.eu
  - WP2@ECLIPSE-project.eu
  - WP3@ECLIPSE-project.eu
  - WP4@ECLIPSE-project.eu
  - WP5@ECLIPSE-project.eu
  - WP6@ECLIPSE-project.eu
  - WP7@ECLIPSE-project.eu
  - WP8@ECLIPSE-project.eu

The mailing lists can be updated as needed at any time. The e-mail subject will start with the name of the project and the WP related. For example: [ECLIPSE][WP2] - This will be very helpful for easily identifying and classifying the messages.

If required, the consortium will use MS Teams (https://www.microsoft.com/es-es/microsoft-teams/log-in) teleconference services for ad-hoc meetings as an alternative to face to face meetings – see section 5. 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.

4.1.1. 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 ECLIPSE project) is sent to the appropriate project partners, using the relevant mailing list.**
- Each mail will have a specific subject (field "Subject"), with the following elements:
  - **The project acronym (ECLIPSE),**
  - **The WP-number, preceded with a hyphen "-"**,
  - The subject,
    Example: ECLIPSE "WP1" Deliverable 1.1 Peer review
- 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 in time, 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 partners are notified by e-mail and invited to consult the documents on the website.

4.1.2. DOCUMENT EXCHANGE FORMAT

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

- Format *.docx/doc (Word or equivalent) or *pdf.
- Track of changes activated (in case of Word file).
- 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 by sharing the link to the file or folder.
- 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 (exceptions may be made regarding papers for conferences if the organizers require them in another format).
- The biannual reports have specific templates (see section 6.3).
- The deliverables, interim milestone brief reports and documents must follow the format and styles indicated in the template available in the corresponding section of ECLIPSE repository.
- These templates can evolve according to the project needs.

4.1.3. DOCUMENT NUMBERING AND NAMING CONVENTION

The deliverables are classified according to the following types:

- R: Document, report.
- DEM: Demonstrator, pilot, prototype.
- DMP: Data Management Plan.
- ETHICS

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

- PU: Public.
- SEN: Sensitive, limited under the conditions of the Grant Agreement.

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 quick identification and indexing:

<dateYYYYMMDD>-<orgshortname>-ECLIPSE- 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 "ECLIPSE", 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 30th November 2024, would be named in the following way:

20241130-etra-ECLIPSE- d1_1-Project Management handbook - pu_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.

4.1.4. DOCUMENT REPOSITORY

A document repository has been set up in order to facilitate the exchange of information. **The tool selected has been SharePoint.** 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 website. ECLIPSE will use SharePoint 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:

https://www.microsoft.com/es-es/microsoft-365/sharepoint/collaboration?rtc=1.

The project-based URL is:

https://etrafic.sharepoint.com/sites/ECLIPSEPROJECT/Shared%20Documents/Forms/AllItems.aspx

Each partner in the consortium has been invited through a link to be a member so they can 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.

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

4.2. NOTIFICATION PROCEDURE

4.2.1. 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: 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.

4.2.2. 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. MEETINGS

In order to coordinate and manage the various activities of the ECLIPSE project, a 2-days physical meeting (CP meetings) will be held on a regular time basis, at least 2 times/year. This meeting will allocate time for the CP and PMB meetings. The PC will set up and updating (each year) a calendar of meetings –that may include dedicated WP meetings. Further project meetings may be planned whenever urgent issues 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 4.1. 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 consequently 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 ECLIPSE PMB meetings, the presence of the TM and WP Leaders (or any representatives of their respective companies), is required.

In relation to the CP meetings all partners are expected to attend.

5.1. MEETING REQUESTS

The corresponding chair will invite for meetings: the WP leader for a WP workshop or meeting (and even Work Package and Task leader if required), the responsible for each innovation/UC (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 partners. In the case of meetings in a dedicated location in Brussels, the PC will organise the meeting.

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

5.1.1. CONVENING MEETINGS

Table 6. Convening meetings.

	Ordinary meeting	Extraordinary meeting
CP meetings	At least twice a year	At any time upon request of the Project Management Board or 1/3 of the Members of the CP
Project Management Board meetings	Twice a month (online)	At any time upon request of any Member of the Project Management Board

5.1.2. NOTICE OF A MEETING

Table 7. Notice of a meeting.

	Ordinary meeting	Extraordinary meeting
CP meetings	45 calendar days	15 working days
Project Management Board meetings	14 calendar days	7 working days

5.1.3. AGENDA DEFINITION

Table 8. Agenda definition for a meeting.

	Ordinary meeting	Extraordinary meeting
CP meetings	7 working days	7 calendar days,
Project Management Board meetings	7 working days	7 calendar days,

5.2. MEETINGS SCHEDULE

Considering the project Work Plan and the budget constraints for meeting purposes, a preliminary schedule for the meetings during the entire lifetime of the project has been created. As stated in section 5, 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 the availability of partners, rooms and progress of activities.

Table 9. CP Meetings Schedule.

Year	CP Meeting	Month	
2024	CP1 (KO-VALENCIA (ES))	Sept-24	M1
2025	CP2	mar-25	M6
	CP3	Sept-25	M12
2026	CP4	mar-26	M18
	CP5	Aug-26	M24

5.3. VIRTUAL MEETINGS

The Project 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 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.
- Inform the Project Coordinator, or meeting organizers, in advance if a partner cannot participate.
- The Project Coordinator, or meeting organizer will provide the minutes, or summary of the meeting to the whole consortium.

5.4. MEETING MINUTES

The following rules will apply to minutes:

- Recording: Minutes must be recorded for every CP meeting. A rapporteur is appointed at the start of 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 partners 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 partner has sent an objection in writing to the chairperson.
- Circulation / Distribution: The chairperson will circulate the final version of the minutes to all the partners that were call 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 each action's 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 (appendixes).

6. REPORTING PROCEDURE

6.1. DELIVERABLES, DOCUMENTS

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

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.

Each partner responsible for a deliverable should send (or upload in the repository) a preliminary version of the deliverable to the Project Coordinator and the consortium at least one month in advance of due date in order to provide enough time for the peer review/quality check of the deliverable.

The peer reviewers review the document and send comments to the deliverable responsible within one week after the request. The rest of the consortium is also invited to revise and send comments. The list of official peer reviewers can be found in section 7.2. If possible, the deliverable responsible, will send a reminder to reviewers one/two weeks in advance of receiving the document.

The deliverable responsible will modify the document accordingly and send it to the Project Coordinator at least 5 working days before the delivery date. In case peer review team encounters the document does not fulfil the requirements for such document, they will notify the deliverable responsible partners within one week after the request. In special cases, such as vacation periods or personal matters, this period may be extended, after consultation with the Project Coordinator and partner responsible for the deliverable.

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 European Commission by means of the Funding and Tenders Portal.

Once the Project Coordinator has submitted the deliverable to the European Commission, 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.

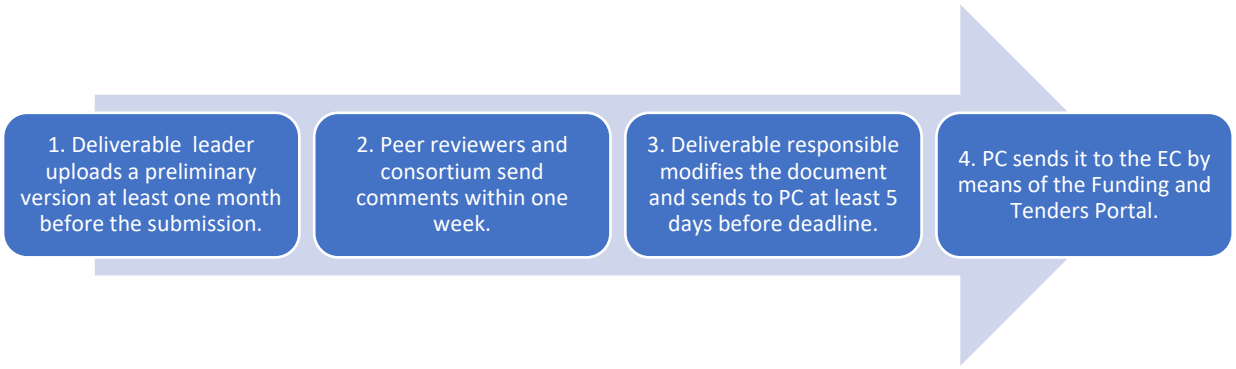


Figure 3. Deliverable revision and submission process

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

Funded by the European Union

This project has received funding from the European Union's Digital Europe research and innovation programme under the Grant agreement N° 101158494.

Additionally, all documents, 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.

6.2. 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 four newsletters (one every six months).
- A brochure template has been prepared to promote and enhance the visibility of the project.

Finally, 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 ECLIPSE, should also be observed when preparing video material.

6.3. BIANNUAL REPORT

Twice a year the Project 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 during the last six months, such as number of person months used, related personnel costs and report of other costs per Work Package.

The Biannual Report shall be available no later than 4 weeks after the end of the period. The Project Coordinator will analyse the reports, taking the requested actions in case of need.

6.4. PROJECT PERIODIC REPORT

In order to provide timely project reporting to the European Commission, efficient and accurate financial data, the periodic cost statements will be aggregated by each partner in the Project Periodic Report (PPR) (M 15 + 60 days, M24 + 60 days), making use of the Participant Portal and the continuous reporting tool provided by the EC.

The Project Periodic Report (PPR) must 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 European Commission 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 Project Coordinator will submit the PPR with the available information in order not to jeopardise the work of the rest of the consortium.

7. QUALITY MANAGEMENT

The main goal of quality 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 practice.

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

The goal has been to define a quality 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.

7.1. CONFLICT RESOLUTION

All partners of the ECLIPSE 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 PMB 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 PMB. Decision making in the administrative domain is the responsibility of the PC with the support of the PMB. 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 PMB (min. quorum 2/3 of the partners) will be taken upon 2/3 of the votes.

Identification of any conflicts lies in the responsibility of each project partner. Any signs of disagreement between project partners 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 partners 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 PMB will take care of the issue applying the same rules as in the decision-making process.

7.2. QUALITY ASSURANCE

As a part of this Project Management handbook, 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.

The details of the internal deliverables reviewing procedure can be found in section 6.1 of this document.

Below can be found the table with the official reviewers per deliverable.

Table 10. Deliverables official reviewers.

N°	Deliverable name	WP	Leader	Type	Dissemination	Date	Peer Reviewers
D1.1	Project management handbook	1	ETRA	R	Pu	M3	INNEUROPE, UBITECH ENERGY, FHOOE
D1.2	Data Management Plan	1	ETRA	DMP	Pu	M3	TRIALOG, D4G, CEZ
D7.1	Dissemination, Exploitation and Communication Plan (DECP)	7	ETRA	R	Pu	M3	EDSO, INNEUROPE, FHOOE
D8.1	OEI - Requirement No. 1	8	ETRA	ETHICS	SEN	M4	TRIALOG, I-DE, UBITECH ENERGY
D2.1	Analysis of existing energy monitoring applications and services in the market and of the legal framework	2	ETRA	R	Pu	M6	NUSTPB, HEDNO, EL
D7.2	Individual exploitation plans	7	INN	R	SEN	M6	ESO, TSOC, CINTECH
D2.2	Energy services analysis, use cases, and CERF requirements	2	I-DE	R	Pu	M12	METLEN, VOLTALIS, CHECKWATT
D4.1	ECLIPSE CERF for Energy Saving applications_V1	4	ETRA	R	Pu	M12	E-REDES, HOPS, CEZ
D3.1	CERF architecture specification and ECLIPSE interoperability profiles	3	TRIALOG	R	Pu	M15	RD NESTER, AELEC, TAURON
D3.2	Specific Data Protection analysis	3	TRIALOG	R	Pu	M15	ESO, TSOC, CINTECH
D5.1	Pilot sites Integration, deployment and engagement activities	5	UBITECH ENERGY	R	Pu	M15	E-REDES, HOPS, RD NESTER
D4.2	ECLIPSE CERF for Energy Saving applications_V2	6	ETRA	R	Pu	M24	NUSTPB, I-DE, UBITECH ENERGY

D5.2	Demonstration activities results	5	UBI	R	Pu	M24	EDSO, AELEC, D4G
D6.1	Economic and socioeconomic impact assessment (User satisfaction and innovative business models assessment)	6	FHOO	R	Pu	M24	INNEUROPE, METLEN, CEZ
D6.2	Definition of replication and scaling-up guidelines and policy makers recommendations	6	EDSO	R	Pu	M24	TRIALOG, D4G, FHOOE
D7.3	Dissemination, Communication and exploitation activities	7	INNEUROPE	R	SEN	M24	CHECKWATT, TAURON, EL

8. 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 ECLIPSE Consortium, thanks to the participation of a well-assorted set of primary companies 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 (via amendment contract), 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 leader will have a backup leader in case the initial WP leader becomes unavailable.

For the ECLIPSE 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.

8.1. 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 ECLIPSE, 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 ECLIPSE that, if they occur, they could result in problems in the development of the expected outputs of the project. Risk events should be defined in a way 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 ECLIPSE 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 DoA. 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 ECLIPSE, 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 European 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.

8.2. RISK MANAGEMENT ORGANISATION AND RESPONSIBILITIES

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

- Briefing the consortium on the status of ECLIPSE 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 European Commission.

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

- Maintaining this section of the Project Management handbook - Risk Management – updated (as a supporting process) for ECLIPSE.
- 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 PMB meetings.

8.3. RISK MANAGEMENT PROCESS

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

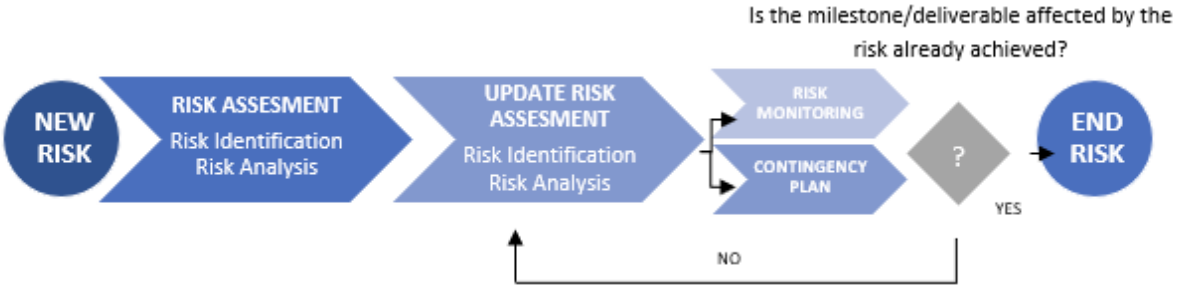


Figure 4. Risk Management Process.

8.3.1. 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.

Risk Identification Process and Procedure

Risk identification is the first step in the assessment process. The basic process involves searching through the entire ECLIPSE 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 8.4 -, 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 ECLIPSE 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.

8.3.1.1. 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 ECLIPSE. Failure to provide (push) available information actively as well as to demand (pull) required information actively will both introduce considerable risk.

8.3.1.2. RISK ANALYSIS PROCESS AND PROCEDURE

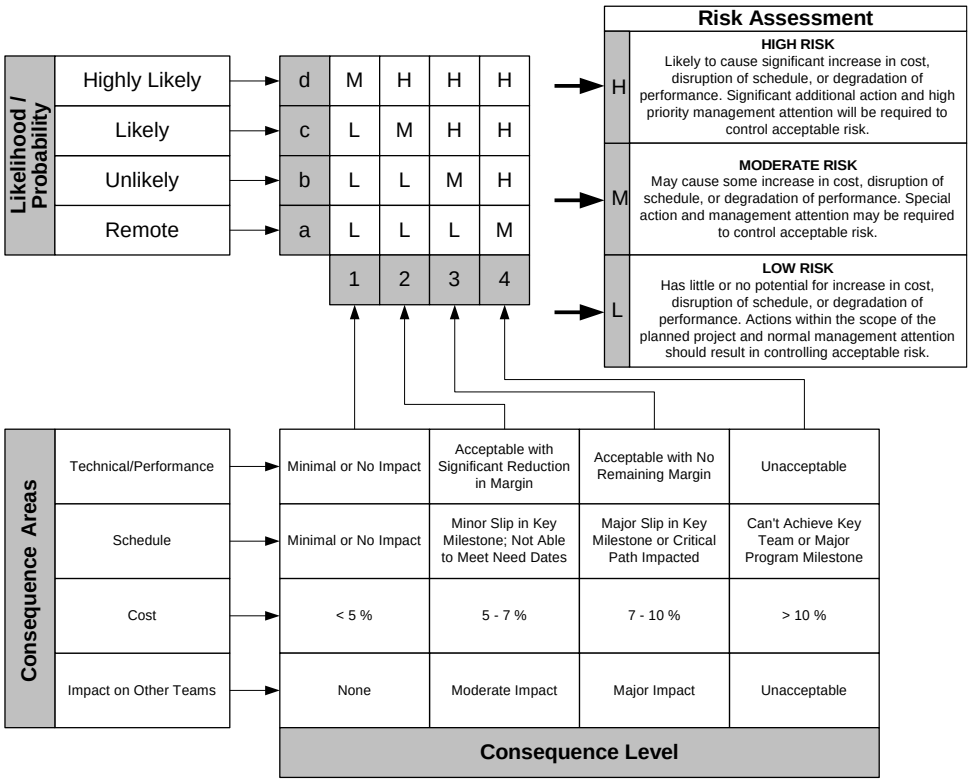
Risk analysis is an evaluation of the identified risk events to determine possible outcomes, critical process variance from known best practices, the likelihood of those events occurring, and the consequences (impact) of the outcomes. Once this information has been determined, the risk event may be rated 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. Prioritization 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 is used for ECLIPSE, to provide a quantitative approach for this process.

Table 11. 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 ECLIPSE 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 are no adverse consequences in any of the areas, there are no risks 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 ECLIPSE consortium in mind.

    - **Cost**: since costs vary significantly within ECLIPSE, 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.

8.3.1.3. 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 must be clearly identified.

8.3.1.4. 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 8.4.

8.3.2. RISK MONITORING

8.3.2.1 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.

8.3.2.2 RISK MONITORING PROCEDURE

Each partner of the consortium is responsible for monitoring and reporting the effectiveness of the handling actions for the risks assigned. The TM will follow the evolution of the risks and make sure that any evolution of the risks is properly monitored.

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 Work Package Leaders, 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.

8.3.3. CONTINGENCY PLAN

8.3.3.1 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 on 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).

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 packages or project's strategy or management plans, as appropriate.

For each selected handling option, the responsible project partner 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 partner 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.

8.4. 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 ECLIPSE 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.

The following risk table is available at the project repository in Ms Teams and will be updated when needed.

		Last Update	01/09/2024												
								Consequence/Impact 1=Minimum-4=Maximum							
ECLIPSE	Nº Risk	WP Leader or Risk manager	Date Identification	Risk description	Type of Risk (Technical/Financial/Schedule)	Risk responsible	Probability HL/L/U/R	Technical Performance	Schedule	Cost	Impact on other teams	Risk Assessment	Global Risk Indicator 0=Minimum4 =Maximum	Dates and trends Open	Contingency Plan or link to document
WP1 Project management and coordination	WP1-1	ETRA	01/09/2024	Conflicts in the consortium (Impact: low, Likelihood: low)	Schedule	ETRA	2	2	2	1	1	LOW	0,75	01/09/2024	The terms and conditions of the Consortium agreement will be applied to eliminate any conflict. Both partners belong to the same company group, which will allow to introduce internal governance measure additional to the CA in case of risk.
	WP1-2	ETRA	01/09/2024	Delays and administrative issues (Impact: low, Likelihood: low)	Schedule	ETRA	2	2	3	1	2	MODERATE	1	01/09/2024	Project coordinator and partners are well-aware of the administrative process. The CA will define actions in case that a partner causes significant delays or administrative issues. Both partners belong to the same company group, which will allow to introduce internal governance measures additional to the CA in case of risk.
	WP1-3	ETRA	01/09/2024	Measures for reaching Gender Balance at all levels of personnel are insufficient	Schedule	ETRA	3	1	1	1	2	MODERATE	0,9375	01/09/2024	The project partners work to promote equal opportunities between men and women in the implementation of the project at all levels of personnel assigned to the action.
	WP1-4	ETRA	01/09/2024	A partner leaves the consortium, for example, because of deterioration of its economic situation.	Schedule	ETRA	2	1	1	1	1	LOW	0,5	01/09/2024	The corrective measures would be distribution to the remaining partners of the activity not fulfilled or to subcontract to a 3rd party, or a combination of the two.
	WP1-5	ETRA	01/09/2024	Disagreement or lack of communication among partners	Schedule	ETRA	2	2	2	1	1	LOW	0,75	01/09/2024	There will be continuous communication between all partners. PC is the responsible for solving conflicts during the project.
WP2 CERF use cases, requirements and services	WP2-1	I-DE	01/09/2024	Insufficient details/ wrong definition of requirements for the user (Impact: high; Likelihood: medium)	Technical	ETRA	2	3	2	1	3	MODERATE	1,125	01/09/2024	All the project partners and relevant stakeholders will be involved from the beginning in the iterative co-creative process for the definition of requirements and to build a common view to contribute to the design of the ECLIPSE CERF.
WP3 Architecture of a scalable and interoperable European open-source CERF and data sets	WP3-1	TRIALOG	01/09/2024	Lack of standards and interoperability problems among the different systems.	Technical	TRIALOG	1	2	1	2	2	LOW	0,4375	01/09/2024	A thorough analysis of existing standards and the selection of the most appropriate will be conducted.
	WP3-2	TRIALOG	01/09/2024	Regulatory framework conditions not favourable (Impact: medium; Likelihood: medium)	Schedule	TRIALOG	2	1	2	1	2	LOW	0,75	01/09/2024	An extensive analysis of the existing regulatory conditions to provide a scalable and Interoperable Common European Reference Framework for energy saving application will be conducted.
	WP3-3	TRIALOG	01/09/2024	Insufficient protection of personal data managed during the project demonstrations. (Impact: medium; Likelihood: medium)	Schedule	TRIALOG	2	1	2	1	2	LOW	0,75	01/09/2024	Specific procedures are defined to collect, storage, protect, retain and destruct sensitive and confidential personal information from participants of the project demonstrations. ECLIPSE will provide a strong data protection framework based on blockchain.
WP4 Design and development of CERF and APIs	WP4-1	ETRA	01/09/2024	Interoperability problems between heterogeneous components/ systems (Impact: low; Likelihood: low)	Technical	ETRA	1	1	1	1	1	LOW	0,25	01/09/2024	Partners will use best practices to prevent interoperability thrust while assessing the design specifications for each component based on an Open-source CERF development plan, ensuring the sustainability of the ECLIPSE CERF beyond the end of the project.
WP5 Preparation, coordination and monitoring of deployment and demonstration activities	WP4-1	UBITECH	01/09/2024	Performed design is ineffective resulting in integration problems (Impact: medium; Likelihood: medium)	Technical	UBITECH	2	2	2	1	2	LOW	0,875	01/09/2024	The Tech. Coordinator and technical partners hold vast experience and knowledge of the domains involved, holding similar roles in relevant R&I activities/ The Technical Coordinator will monitor the design process to quickly identify ineffective designs and take proactive measures
WP6 User satisfaction assessment and recommendations of the regulatory framework	WP6-1	FHOOE	01/09/2024	Reluctance from demo partners to share data due to confidentiality and security issues (Impact: High; Likelihood: Medium).	Technical	FHOOE	2	3	2	2	2	MODERATE	1,125	01/09/2024	Consortium Agreement will define the terms regarding access to data and existing knowledge / Secure mechanisms will be deployed for data sovereignty and sharing for data which is characterized as "sensitive" and "confidential"/ Continuous engagement and capacity building activities for removing relevant barriers through the ECLIPSE demonstration sites.
WP7 Dissemination, communication and exploitation activities	WP7-1	INNEUROPE		Lack of collaboration inside and outside the consortium from other associations, clusters, Stakeholders (Impact: low, Likelihood: medium)	Schedule	ETRA	2	1	1	1	1	LOW	0,5	01/09/2024	Preliminary contacts have been and will be established to ensure a smooth cooperation and complete engagement. However, if needed, further linking activities will be set through the involvement of regional government and agents.
	WP7-2	INNEUROPE		Unsuccessful exploitation strategy in terms of attracting the relevant stakeholders	Financial	ETRA	2	1	1	2	2	LOW	0,75	01/09/2024	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.
WP8 Ethics requirements	WP8-1	ETRA		Lack of cooperation of the project partners due to IPR issues.	Financial	ETRA	2	2	2	2	1	LOW	0,875	01/09/2024	Possible IPR issues have been discussed among the partners already in the proposal phase and IPR and access right clauses will be included in the CA which will be signed before the project starts to avoid future disputes.
	WP8-2	ETRA		Insufficient protection of personal data managed during the project demonstrations.	Financial	ETRA	1	1	1	1	1	LOW	0,25	01/09/2024	Specific procedures are defined to collect, storage, protect, retain and destruct sensitive and confidential personal information from participants of the project demonstrations.

9. DISSEMINATION

The sections below outline basic procedures and key information regarding Dissemination in ECLIPSE. The complete analysis of the dissemination plans will be covered at D7.1 Dissemination, Exploitation and Communication Plan (DECP).

9.1. 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 European 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 15 days in advance of the event. The notification may be submitted to the Project 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 ECLIPSE – 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.
- Unless the European Commission requests otherwise, any notice or publication by the partners about the project, including at a conference or seminar, must specify that the project has received research funding from the European Union's Digital Europe 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 17.2). A pre-print or an abstract of the paper should be sent to the Project 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 European Commission is not liable for any use that may be made of the information contained therein.

- If a published/presented/disseminated 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.
- Partners may provide to the Project 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 Project Coordinator.
- The provisions of the Contract (article 17) and the Consortium Agreement (section 8.4) 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 DIGITAL EUROPE project ECLIPSE (101158494).
- 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.

9.2. PROJECT PUBLICATIONS AND COMMUNICATIONS

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

Funded by the European Union

This project has received funding from the European Union’s Digital Europe research and innovation programme under the Grant agreement N° 101158494.

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

Dissemination and Communication Manager (DCOM): María Provecho (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 by the Project Coordinator.

In general, the dissemination activities, including but not restricted to publications and presentations, shall be governed by Article 17 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.

9.2.1. 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 DCOM, ETRA will coordinate the press releases for the milestones. Partners willing to issue their own press releases must contact first with the DCOM in order to cross-check if something is already available on the subject.

For all other public project related communication, the use the ECLIPSE logo and acknowledgement of EU funding and disclaimers are mandatory. When it comes to IPR, all publication must follow the Grant Agreement and the Consortium Agreement.

9.2.2. IMAGE RIGHTS AND QUALITY

Notes on image quality and image rights needs 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:

Table 12. Image rights and quality.

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

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

9.3. OPEN ACCESS TO ECLIPSE SCIENTIFIC PUBLICATIONS

ECLIPSE supports the EU's Open Data policy by making research results freely accessible, including methodologies, tools, data, and publications. This promotes transparency, collaboration, and increases the project's visibility and impact.

The project prioritizes public access to results, with datasets shared on Zenodo and described with detailed metadata for easy reuse. Ethical considerations will guide any data restrictions, particularly for research involving human subjects, ensuring that pseudonymized data is available with proper consent.

Open access can be defined as online access to research outputs provided free of charge to the end-user.

Open access to scientific publications: The beneficiaries must ensure open access to peer-reviewed scientific publications relating to their results. In particular, they must ensure that:

- at the latest at the time of publication, a machine-readable electronic copy of the published version or the final peer-reviewed manuscript accepted for

publication, is deposited in the project website and in Zenodo, a trusted repository for scientific publications.

- immediate open access is provided to the deposited publication via the repository, under the latest available version of the Creative Commons Attribution International Public Licence (CC BY) or a licence with equivalent rights; for monographs and other long-text formats, the licence may exclude commercial uses and derivative works (e.g. CC BY-NC, CC BY-ND) and
- information is given via the repository about any research output, or any other tools and instruments needed to validate the conclusions of the scientific publication.

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

9.4. ECLIPSE WEB SITE

9.4.1. 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:

- Home: This section contains a briefly general description of the project, innovations, pilots, partners, and latest news and coming events.
- Project: This menu presents in detail the project by explaining the background, goals, innovations, pilot sites, expected impact, results and consortium, including three subsections:
  - Innovations.
  - Pilot Sites.
  - Partners
- News and events: This section will share news relevant to ECLIPSE's goals and technologies, including updates on progress and outcomes, as well as other noteworthy news items. Additionally, it will feature information on all internal and external events related to the project.

  This section will contain all the events internal and external to the project that will keep a tight relation with ECLIPSE, 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.
- Library: The contents of this section will be composed of public documents aimed at various target audiences and made readily accessible. It will present eight sections:
  - Dissemination materials, including ECLIPSE roll up, brochure and poster
  - Videos
  - Newsletters
  - Public deliverables. All the project public deliverables will be published in this section duly secured.
  - Workshops
  - Scientific publications
  - Publications
  - Media presence
- Related Links: Links of interest for the project.
- User group: This section will allow the creation of ECLIPSE 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 ECLIPSE: Coordinator brief profile and contact details.

10. KPI MANAGEMENT

10.1. KPI DEFINITION

The first step in the KPI management is the definition of the KPI list. This list will be based on the preliminary list in section 10.3 and will be reinforced by getting inputs from the ECLPISE consortium. The responsible partners for each KPI will then be decided. Finally, each KPI will be detailed by the responsible partners, including the calculation methods, data needed, data collection period and expected results.

The TM will organise the definition of the KPI, in collaboration with all project partners. The KPI will be divided into categories to manage their definition.

The definition of the KPI will be done by M6 and will be included as part of deliverable D2.1 “Analysis of existing energy monitoring applications and services in the market and of the legal framework”.

10.2. KPI MONITORING

Once the KPI are defined, the baseline values of each KPI will be calculated at M6. Any improvement will then be measured in comparison to these initial values.

The KPI will be continuously monitored by the responsible partners, who will collect the data and calculate the KPI according to the definition. They will report the progress to the TM. The TM will supervise their progression and regularly report on the progress to the consortium. The final results of the KPIs calculation will be included as part of D6.1 “Economic and socioeconomic impact assessment (User satisfaction and innovative business models assessment)”.

10.3. PRELIMINARY KPI LIST

Here is the compiled list of KPI defined in the Grant agreement. This list will be consolidated and detailed by M6.

Table 13. Initial list of ECLIPSE KPIs

KPI ID	KPI type	KPI title	Description	Expected results (M24)
1	Deployment	States deployed	EU member states where the CERF for energy saving applications is broadly deployed	16
2	Deployment	Downloads	Number of new downloads and active users of the CERF for energy saving applications in project pilot sites	> 40,000
3	Deployment	Stakeholders' development	Number of energy stakeholders collaborating on the development and deployment of the CERF (DSOs, TSOs, aggregators, user organizations, IT providers, etc.)	> 23
4	Project	Milestones	Successful completion and achievement of all milestones of the CERF for energy saving applications within the designated timeline and budget.	100%
5	User satisfaction	Consumers satisfaction	User satisfaction (final consumers) with the CERF for energy saving applications, measured through surveys and feedback.	8 / 10
6	User satisfaction	Grid operators' satisfaction	User satisfaction (grid operators) with the CERF for energy saving applications, measured through surveys and feedback.	8 / 10
7	User satisfaction	Retailers & aggregators satisfaction	User satisfaction (retailers and aggregators) with the CERF for energy saving applications, measured through surveys and feedback.	8 / 10
8	Dissemination	Stakeholders group	Number of members of stakeholders group involved at the end of the project	15
9	Dissemination	Dissemination activities	Number of dissemination and awareness activities	20

			organized during the project for CERF widespread adoption	
10	Dissemination	States interested	Number of additional EU member states that showed interest to deploy the project solutions at the end of the project	10
11	Impact	Bill	Energy bill reduction of final consumers	20%
12	Impact	Consumption	Energy consumption reduction of final consumers	10%
13	Impact	GHG	Reduction of GHG emissions	30%
14	Impact	RES share	Increase of Renewable electricity share	30%
15	Impact	Peak-load	Peak-load reduction through flexibility	15%
16	Impact	Short-term congestions	Reduction of short-term congestions (operation)	6%
17	Impact	Long-term congestions	Reduction of long-term congestions (planning)	5%
18	Impact	Investments	Investments deferral in grid infrastructures	15%
19	Impact	RES curtailment	Reduction of RES curtailment	8%
20	Dissemination	DECP	Creation of the Dissemination, Exploitation and Communication Plan	ready in M3
21	Dissemination	Website and social media	Creation and impact of website and social media channels	> 6500 visitors, 5000 page visits, 1 min average duration of visits >500 followers >750 posts >62000 impressions >800 likes
22	Dissemination	Target groups	Definition of the target groups in each pilot for the organisation of workshops	1 workshop in each pilot > 100 participants 2 videos
23	Dissemination	Mailing campaign	Mailing campaign to present the project role assignment through the partners	participation in >4 events per year >4 initiatives reached and stabling collaborations >25 stakeholders contact points

11. ACRONYMS

Table 14. Acronyms

Acronym List	
CA	Consortium Agreement
CFP	Call for Papers
CP	Consortium Plenary
DCOM	Dissemination and Communication Manager
DMP	Data Management Plan
DoA	Description of Action
EC	European Commission
FAIR	Findable, Accessible, Interoperable and re-usable
LL	Living Lab
OA	Open Access
PC	Project Coordinator
PMB	Project Management Board
PMP	Project Management Plan
PPR	Project Periodic Report
PSC	Project Steering Committee
PV	Photovoltaics
TM	Technical Manager
WBS	Work Breakdown Structure
WP	Work Package

Thank You

If you have any questions, please get in touch with us.

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