




Project Management Plan

Project name	Expert support to Implementation Working Group 5 of the SET Plan - Energy Efficiency in Buildings
Grant agreement	101075700



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Deliverable Factsheet

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Review	All consortium partners

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Executive summary

The Project Management Plan (PMP) summarises the initial working approach and methods to be adopted for implementing the Coordination and Support Action project financed by Horizon Europe that supports the [Implementation Working Group on Energy Efficiency in Buildings](#) (IWG5). General information on the project IWG5-CSA, including its key tasks and budget, can be found [here](#).

This is the 1st version of the PMP, which was prepared shortly after a first coordination between the main partners EUREC, ECTP and the leadership of IWG5 on 20 Sept, the project's kick-off meeting on 22 Sept held physically over a day in Brussels, and a consortium meeting to align on the first tasks on 10 Oct. As with any project and management approach, procedures will be updated and modified to adapt to specific needs as they arise during the project up until its conclusion in August 2025.

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Introduction

The PMP summarises the working approach and methods to be adopted for implementing the IWG5-CSA project that runs for 36 months between September 2022 and August 2025. This plan will be used by the project's consortium, which is composed of the following four organisations:

- [The European Association of Renewable Energy Research Centres \(EUREC\)](#) - Coordinator
- [The European Construction, built environment and energy efficient building Technology Platform \(ECTP\)](#) - Beneficiary (technical coordination)
- [WIP renewable Energies](#) - Beneficiary
- [Eurac Research](#) - Beneficiary

The purpose of the PMP is to provide partners with a written reference for of our approach on issues that might arise relating to project implementation / project working methods. The coordinator EUREC and other leading partner ECTP will update it by the end of the project's first reporting period in spring of 2024 and make any course corrections as and when they are needed, minuting these from our project management meetings.

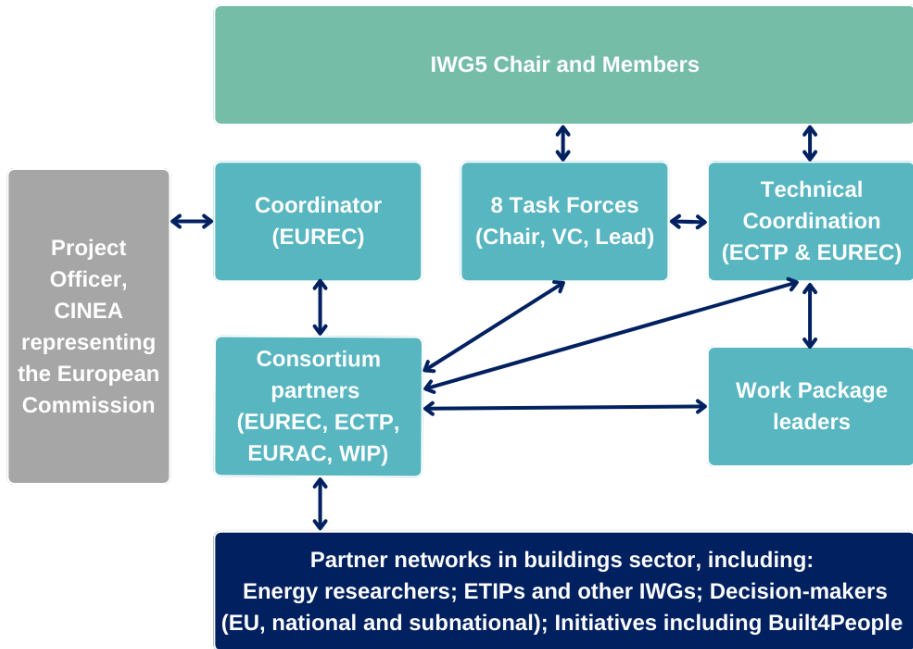
For clarification on any points, consortium partners should contact the authors of this report.

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1. Project governance structure

The key roles and interlinks between project partners and other external actors is summarized in a diagram below followed by complementary explanations to the graphic.

Key roles in governance of the IWG5-CSA project



Source: Own graphic created on the basis of the roles defined in the Grant Agreement and the pre-existing IWG5.


IWG5 Chair and Members: The IWG5 group has the final say on all actions carried out by the project IWG5-CSA, including setting up task forces, publications, setting meetings and external communication. The Chair and the IWG5 group may delegate and modify tasks carried out by the consortium. The Consortium has discretion on how it organises itself internally and reports to the European Commission.

Project Officer, European Commission: The coordinator (EUREC) reports to CINEA, the executive agency delegated by the European Commission. The coordinator is also responsible for implementing requested changes and reporting back to the consortium.

Coordinator (EUREC): The coordinator is responsible for the communication and the smooth functioning of work within the consortium. This includes ensuring that tasks, deliverables and deadlines are respected and reporting on the project to the Commission.

8 Task Forces: The project foresees creating 8 task forces that will deliver white papers that will be used to update the IWG5’s implementation plan. See below a section dedicated to task forces.

Technical coordination (ECTP & EUREC): ECTP as WP1 leader will be the primary channel of communication between the consortium and IWG5. Determining any necessary course adjustments linked to scientific coordination during the project will be ECTP’s responsibility.

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The day-to-day coordination tasks will be shared between 2 partners, who together lead all packages of the project. Their areas of responsibility are generally divided by the Work Packages that they lead:

- ETCP: WP1 Community consolidation (membership and network); WP3 Implementation Plan update and task forces
- EUREC: WP2 Newsletter and baselining; WP4 Communication; WP5 Management

Work Package leaders: the technical coordinators (EUREC & ECTP) also lead all 5 Work Packages of the project. They will be responsible to carry out and/or oversee tasks in their respective work packages and related reporting.

Consortium partners (EUREC, ECTP, EURAC and WIP): Partners are responsible for carrying out their respective tasks, as specified in the Grant Agreement, and to provide information requested by the project coordinators. Where a mass communication is needed towards IWG5 members this will generally be ECTP's job; EUREC is the first port of call for grant agreement administration questions; EUREC will relay them to the European Commission if necessary.

Partner networks in buildings sector: In line with the objectives of the project, partners will engage with relevant actors in their own networks to increase the profile and visibility of IWG5. This includes bringing in new IWG5 members, finding external speakers for IWG5 events and publicizing the group's work via diverse channels.


2. Contractual structure and financial aspects

The Grant Agreement governs the project. All partners follow the terms and conditions defined in the Grant Agreement (N° 101075700) that was signed by the consortium and the European Commission.

No subcontracting is foreseen. Where a Partner fails to perform according to its contractual requirements, the granting authority may reduce the grant for the beneficiary, as stated in the Grant Agreement.

It is the responsibility of individual partners (not the Coordinator) to ensure that their accounting practices and hence eligibility of costs complies with the Commission regulations as defined in the Grant Agreement. Partners should note that the Commission retains the right to audit any partner at any time, and for a period beyond completion of the project. Where costs are found to be ineligible, the corresponding amount of the grant, if already disbursed, may be recovered from the partner responsible by the European Commission.

The European Commission provides detailed guidelines on financial issues associated with project implementation that can be accessed on the official website: <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home>

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3. Channels and methods of communication

Emails are the main method of communication between partners, IWG5 members, the European Commission and stakeholders. Other channels may also be used. The main working language in the project is English, although other common languages may be used whenever this is practical and preferable.

Consortium partners will be using a private online folder on google drive as shared documents repository, where draft project outputs, internal memos or confidential deliverables may be shared or worked on.

The IWG5 [website](#) will be updated in the first months of the project by EUREC in cooperation with the group's Chair that currently runs the website. This also includes revamping the members' only section.

Intra project communication was defined under [Project Governance Structure](#). In general terms, EUREC is in contact with the European Commission, ECTP handles the communication with IWG5. Consortium partners are encouraged to contact IWG5 on a bilateral basis to carry out specific tasks.

4. Meetings and events related to IWG5-CSA

ECTP and EUREC will hold monthly IWG5-CSA consortium calls or physical meetings when possible (with a one-month break in summer), with the presence of the other partners required as the agenda requires. ECTP will set the agenda. EUREC will take and circulate minutes in the form of an executive summary of the call (action points only). Calls will be recorded to aid notetaking.


The technical coordinators will support the IWG5 Chair to organize bi-monthly meetings with members. Meetings will be online for the most part, and where, possible in person (ideally linked to SET Plan conferences and study trips).

Per WP1, Study tours to an energy-efficient building or collection of buildings (new-built and renovated) where local people can explain to the IWG the factors that shaped that building's work will be organized once a year for IWG5 members and guests. They will be combined an in-person annual internal meeting. WIP is responsible for this task.

The IWG5 will aim to meet as a side event in SET Plan conferences, with the help of the European Commission and local organizers. The Chair will be supported by the consortium, notably technical coordinators. Minutes of IWG5 meetings will be taken by ECTP.

5. Task forces in IWG5

One of the key activities of the CSA project over its 3 years is to set up and support 8 task forces on specific issues that will draft white papers, these in turn serving as a basis to upload

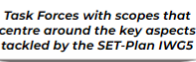
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IWG5's Implementation Plan. Work Package 3 is led by ECTP , with the participation of EUREC and WIP.


IWG5 members, external experts and consortium partners may join the task forces. Each task force will have a Chair, Vice Chair (both members of IWG5) and support from a consortium partner in WP3 Task 1 (EUREC, ECTP or WIP). The Chair and VC will be responsible for content, assisted with drafting and editing by the WP3 partners.


The choice of topic and outcomes of these task forces will be determined by IWG5 members. It is possible to remunerate chairs and vice-chairs from part of the CSA budget that is earmarked for this. Consortium partners will share the responsibility of supporting each task force (see slide below with provisional list of TFs and tentative distribution), including finding its members, setting meetings, supporting chair with drafting.


Structure of Expert TFs: groups of 5-6 people?




Task Forces with scopes that centre around the key aspects tackled by the SET-Plan IWG5










Direct link to the IWG5 through the chairperson, who is coordinating and driving the content (supported by 1 IWG5-CSA partner)

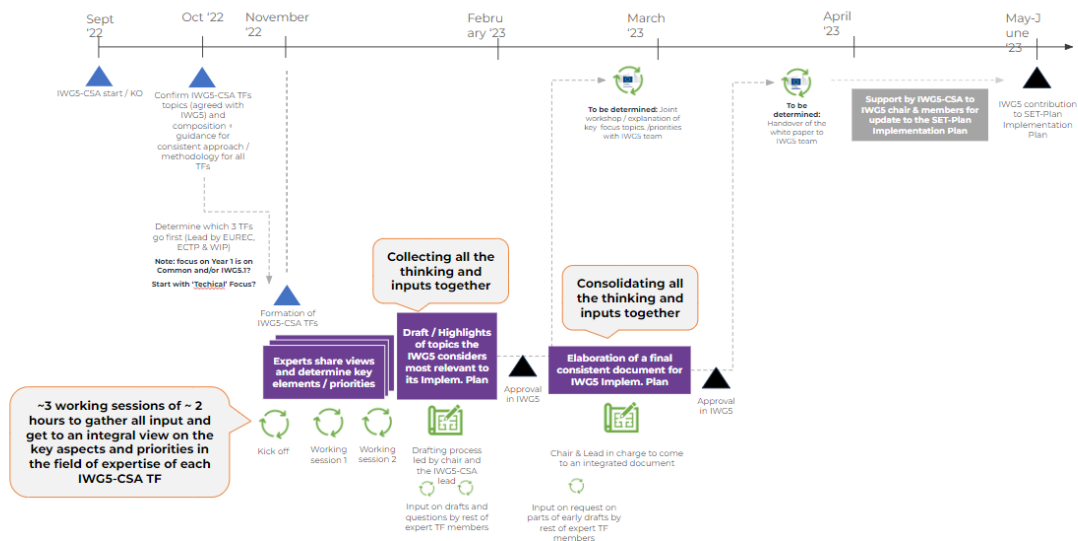
Task Force	Lead support: ECTP	Lead support: EUREC	Lead support: WIP	IWG5 member as chair
Technological pushback	• Lead support: ECTP • TBC	• TBC	• TBC	• 1 IWG5 member as chair: TBC
Industrial Production	• TBC	• Lead support: EUREC • TBC	• TBC	• 1 IWG5 member as chair: TBC
Just Transition	• TBC	• Lead support: EUREC • TBC	• TBC	• 1 IWG5 member as chair: TBC
Impacts of societal transformation on eco-buildings	• TBC	• TBC	• Lead support: WIP • TBC	• 1 IWG5 member as chair: TBC
New materials for buildings	• Lead support: ECTP • 2-3 Materials & Sustainability (M&S) ECTP Committee members	• TBC	• N/A	• 1 IWG5 member as chair: TBC
Prefabricated active modules for facades and roofs or key enabling technologies for active building skins	• 2-3 Energy-efficient Buildings (E2B) ECTP Committee members including EURAC	• Lead support: EUREC • TBC	• N/A	• 1 IWG5 member as chair: TBC
Digital planning and operational optimisation	• Lead support: ECTP • 2 Digital Built Environment (DBE) ECTP Committee members	• TBC	• N/A	• 1 IWG5 member as chair: TBC
IWG5.2 focused themes	• TBC	• Lead support: EUREC • TBC	• TBC	• 1 IWG5 member as chair: TBC

Source: ECTP slides at Kick-off Meeting

It is expected that 3 waves of 2-3 task forces – each lasting around 1 year - will be needed to produce all expected white papers. A slide with a diagram of the chronology and functioning of a TF loop can be seen below. The challenge will be to recruit members for the task forces.

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Operating TFs over IWG5-CSA Year 1



Source: ECTP slides at Kick-off Meeting


6. Data management and confidentiality

EUREC will develop a data management plan by the end of 2022 (M4).

Data is extracted and re-processed in Task 2.2 and used for modelling in Task 3.2. Results will be shared by the responsible partner (EURAC) in scientific circles in approximately 2 open-access journal publications. Two scientific conference presentations are foreseen, including covering WIP's work. The data management plan will set out who owns this engagement and outreach data, such as social media engagement and readership of the project's newsletter. The plan will be updated as necessary, e.g. if the project chooses to collect new kinds of data. It will set out partners' duties under the GDPR rules using a standard format and routine clauses.

7. Project reporting

It is important that all Partners recognise the importance of prompt and appropriate reporting of the project research, since subsequent payments and continuation of the project depends upon the European Commission's acceptance of these reports. The reporting process covers both technical and financial reporting; some actions are performed by all partners and others by just the Coordinator. The European Commission must approve the periodic reports before further, interim funding is released to the project partners. This note first provides an overview of the reporting process – as described online (December 2018) at http://ec.europa.eu/research/participants/docs/h2020-funding-guide/grants/grant-management/reports_en.htm

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An example of technical reporting can be found here: http://ec.europa.eu/research/participants/data/ref/h2020/gm/reporting/h2020-tmpl-periodic-rep_en.pdf

Technical reporting to the EC at M18 and M36 will be led by EUREC and ECTP, with inputs from the other partners for their Tasks. Partners' financial reports will be checked by EUREC before submission on the portal. Partners will join both project review meetings with the European Commission, with WP leaders organizing and leading and other partners explaining progress in their tasks and deviations from the Grant Agreement.

8. Project tasks and deliverables

Partners will keep track of their own tasks and deliverable deadlines, which are listed both in the Grant Agreement and in the project's GANTT chart (see Annex I). Work package leaders will ensure that the quality and deadlines of the material delivered are maintained (see below Work Package table). Before send-off, documents will be reviewed by at least one other partner (usually WP leader/technical coordinator). Deliverables will be uploaded to the European Commission Portal and simultaneously sent to the administrative coordinator (EUREC), who will generally notify the European Commission's Project Officer responsible for IWG5-CSA. In case a partner has issues with the "Portal", it should contact EUREC.


IWG-CSA Work Packages and leads:

WP	Organisation	Lead
1	Community consolidation	ECTP
2	Policy radar & baselining	EUREC
3	Update of IWG5's Implementation Plan	ECTP
4	Dissemination, Exploitation and Communication	EUREC
5	Management	EUREC

Source: Introductory slide presented at first meeting between IWG5 and the consortium (online) on 24.10.2022


Other tasks of IWG5-CSA mentioned here for completeness:

- ECTP will work on Community consolidation, with the aim of strengthening the membership IWG5 and extending its reach to other networks working on buildings (WP1)
- EUREC will publish the "Policy Radar", a bi-monthly newsletter on policy news and buildings industry developments, that will be out shortly before IWG5 meetings (WP2)
- EURAC's report establishing baselines for IWG5's agreed specific targets (WP2)
- EUREC's work on Dissemination and Communication to increase the visibility of IWG5, including updating its website and producing visual material (WP4). This will include producing templates for documents and other publications (e.g. deliverables, presentations, formal letters) that consortium partners are required to use.

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Conclusion

This PMP was created at the start of the project based on the Grant Agreement, the Kick-off meeting and other bilateral exchanges between partners and members. As IWG5-CSA progresses and develops, it is expected that the plan will be updated accordingly. A key objective to consider in future updates is how the functioning of the project can best support the needs of IWG5 members, considering for example the group's new Terms of Reference that will be updated in late 2022.

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Annex I: Gantt Chart

