D1.1 Project Handbook

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Big Energy Data Value Creation within SYNergetic enERGY-as-a-service Applications through trusted multi party data sharing over an AI big data analytics marketplace

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I. ANNEX A. Reviewers per deliverable 38

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Abbreviations and Acronyms

Acronyms List	
BIM	Business and Innovation Manager
CO	Confidential Only
CP	Consortium Plenary
DIM	Dissemination Manager
DoA	Description of Action
EC	European Commission
GNU	General Public License
H2020	Horizon 2020. The EU Framework Programme for Research and Innovation
ICT	Information and Communications Technology
LEPI	Legal, Ethical, Privacy Issues Officer
PC	Project Coordinator
PDF	Portable Document Format
PMB	Project Management Board
PO	Project Officer
PPR	Project Periodic Report
PSC	Project Steering Committee
PU	Public Usage
QA	Quality Assurance
TL	Task Leader
TM	Technical Manager
TRL	Technology Readiness Level
URL	Uniform Resource Locator
WP	Work Package
WPL	Work Package Leader

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Executive summary

The Project Handbook is a document that establishes the foundation for the project cooperation processes and defines all aspects that must be taken into account in order to assure an efficient and coherent management of the project, including: a brief description of the project, its objectives and the scope; the contacts of all partners involved in the project and the coordinator details; guidelines and recommendations regarding the communication activities of SYNERGY and the Quality Assurance Plan. Concerning the dissemination of the project results, the publication procedure that must be followed by all partners is included.

Specific attention is paid to the Quality Assurance Plan, which describes the roles of the different actors in the project management, meeting schedules and gives guidelines for performing the day-to-day project management actions. The internal reviewing procedure is of great importance since it is one of the main tools to guarantee the quality of the results. SYNERGY will follow a procedure based on the peer review of the project deliverables which must ensure they are submitted to the EC with the highest quality.

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1 Introduction

1.1 Purpose of the document

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

The project 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 SYNERGY. 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.

The purpose of this document is, therefore, to describe the reporting procedures, communication policies, and the essential information needed in order to facilitate the cooperation and exchange of information among partners in an efficient and agile way.

1.2 Scope of the document

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

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

The document will be updated at the end of the first and second reporting periods (M18 and M30). The current version already introduces adjustments to the work plan for the current reporting period.

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1.3 Structure of the document

This document is structured as follows:

- Section 2 provides a summary of the SYNERGY project, including scope, objectives and work plan. This section is aimed to be the basic information to be used internally when presenting the project within each organisation of the SYNERGY consortium.
- Section 3 includes the list of SYNERGY partners
- Section 4 provides the Quality Assurance Plan, including the details of the SYNERGY management structure.
- Section 5 deals with decision making and conflict resolution.
- Sections 6 to 8 are specific tools to facilitate the cooperative processes in the project: decision making and conflict resolution procedures, the communication guidelines, the main reporting procedures, and finally a short summary of dissemination tools.
- Section 9 concludes this deliverable and Section 10 lists the related references.
- Annex A summarizes the reviewers that have been pre-assigned per deliverable.

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2 Project Summary

2.1 Introduction

SYNERGY will introduce a highly effective, innovative and scalable reference architecture and implementation for a **Big Energy Data Platform and Analytics Marketplace**, accompanied by big data-enabled domain-specific applications to help the electricity value chain stakeholders to enhance their data reach, improve their internal intelligence and optimize operations and benefits, while introducing themselves into novel business ecosystems based on data (intelligence) sharing/trading. This will allow for achievement of further intelligence and benefits enhancement, provision of new and innovative energy-related services and creation of new revenue streams out of the data and the intelligence they produce.

At the end of the day, the real value of the SYNERGY framework stems from the benefits it will generate for all involved electricity sector actors, through the provision of a bundle of innovative (analytics-based) applications and services, addressing their emerging business and optimization needs and facilitating the realization of a data sharing-based energy economy with profound benefits.

5 large-scale demonstrators in 5 EU Member states, involving diverse actors and data sources, heterogeneous energy systems/ assets, and spanning heterogeneous climatic, demographic and cultural characteristics will facilitate replicability, scale-up and eventual market launch.

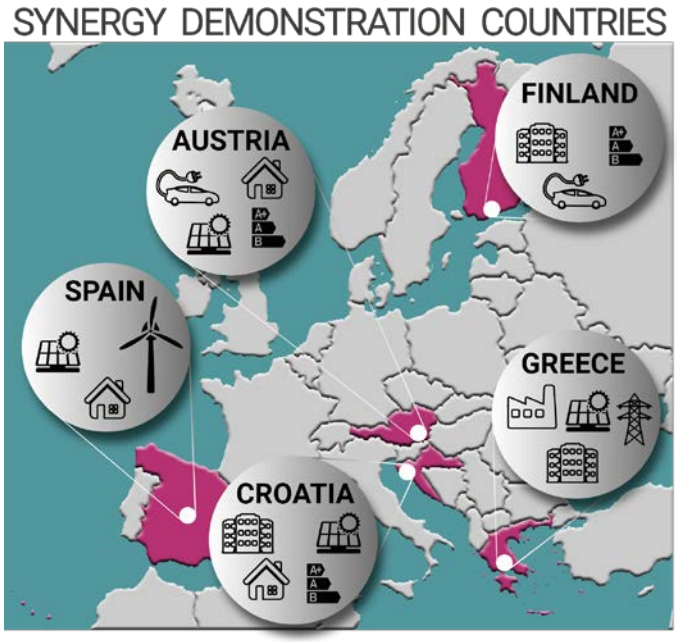

Figure 1 – SYNERGY Demo sites

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2.2 Objectives of the project

The SYNERGY objectives can be summarised around 7 main pillars, which can be further divided into two main categories:

Technical objectives focusing on the delivery of the SYNERGY technologies and applications, which will be used as the basis for business exploitation and commercialisation through a business plan.

- Objective 1: To deliver a novel Big Data platform powered by energy-related data that effectively addresses the complexity of the energy/electricity sector value chain interactions and allows for the delivery of innovative Energy-as-a-Service offerings, through central as well as federated experimentation with big data analytics, service composition, data sharing, assets reuse and business value generation.
- Objective 2: To integrate existing big data technologies, tools and libraries, with energy sector legacy systems and ICT-enabled assets and components to accelerate the data management and analysis cycle for powering the SYNERGY platform, turning the 4 Big Data V's into Stakeholder Value.
- Objective 3: To deliver an innovative, secure, privacy-preserving and IPR respecting multi-party data exchange and sharing framework, propelling the creation of a joint venture of data owners and analytics providers.
- Objective 4: To enable the delivery of added value services that satisfy emerging energy sector stakeholders needs and effectively contribute to the short-, mid- and long-term targets for a cleaner, more sustainable and more efficient energy system characterized by maximized RES integration, increased Energy Efficiency, enhanced Consumer Empowerment and Democratized Energy Markets.

Business, Innovation and Exploitation objectives that focus on the evaluation and validation of the solution, the spread of the excellence gained and its entrance into the market.

- Objective 5: To bring forward novel collaborative business models driven by big data sharing and analytics services, benefiting the whole value chain of actors relevant to the electricity domain.
- Objective 6: To deliver a reference big data platform architecture and implementation for the electricity data value chain, validated through a set of representative, large-scale and long-lasting demonstrators.

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- Objective 7: Promote the adoption of the SYNERGY solution as a next-generation Big Data Platform for data sharing-based EaaS applications through intense dissemination and knowledge transfer of the project's outcomes towards the targeted stakeholders, reaching out to international audiences within and beyond the EU.

2.3 Work Plan Summary

The SYNERGY work plan comprises four main phases that encompass the work from specification generation up to validation and impact assessment of the demonstration sites:

- Phase 1: Diagnostics, Analysis and Design (WP2): this phase aims at establishing the foundation for the rest of the project, including use cases definition, business requirements and architecture design.
- Phase 2: Technology Configuration and Prototyping (WP3-WP7): the second phase builds upon the results of the previous one and encompasses the customization, configuration and integration of the technological solutions for the implementation of the integrated technology framework.
- Phase 3: Integration and Deployment (WP8): this phase is devoted to the **project demonstrators**, from roll-out to impact assessment. **Overall Evaluation** of the entire project and its achievements, along with individual evaluations of the demonstrators, cost-benefit assessments and comparative cross-pilot analyses, will assess the project's success against the initially set objectives and performance criteria.

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- Phase 4: Business Innovation (WP9-WP10): this phase comprises horizontal, supporting activities of the project namely (i) **Dissemination and Exploitation**; (ii) **Business Innovation Planning,** and (iii) **Standardization and Policy/ Market reform activities**.

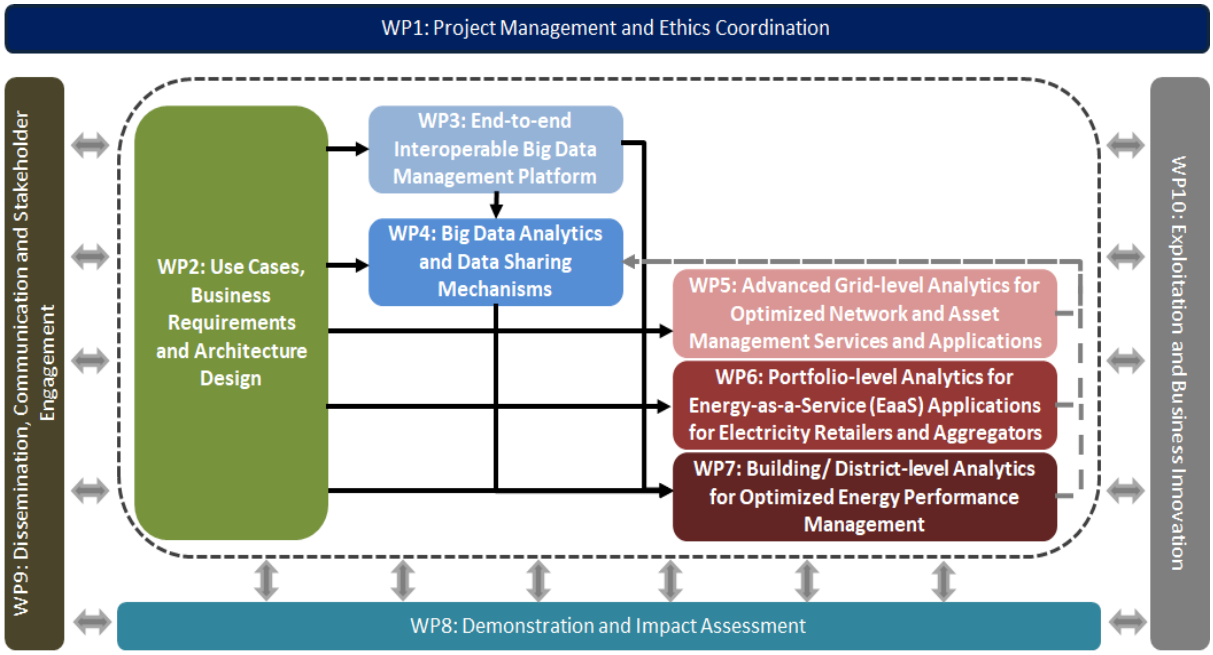

Figure 2: SYNERGY PERT Diagram

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3 Participant Contacts

Due to the nature of the information in the following sections, the contents hereafter have been flagged as 'confidential'. The public version of this document does not provide the contact details of the people involved in the project, which can be found in the project repository.

Table 1 – Participants details

Nr.	Organisation name	Short name	Country
1	ETRA INVESTIGACIÓN Y DESARROLLO	ETRA	Spain
2	DIACHEIRISTIS ELLINIKOU DIKTYOU DIANOMIS ELEKTRIKIS ENERGEIAS AE	HEDNO	Greece
3	INSTITUTE OF COMMUNICATION & COMPUTER SYSTEMS	ICCS	Greece
4	FORUM VIRIUM HELSINKI OY	FVH	Finland
5	Teknologian tutkimuskeskus VTT Oy	VTT	Finland
6	Grupo Empresarial Cuerva S.L.	CUE	Spain
7	COBRA INSTALACIONES Y SERVICIOS S.A	COBRA	Spain
8	SUITE5 DATA INTELLIGENCE SOLUTIONS LIMITED	S5	Cyprus
9	SISTEMAS URBANOS DE ENERGIAS RENOVABLES, S.L	URB	Spain
10	FUNDACION CIRCE CENTRO DE INVESTIGACION DE RECURSOS Y CONSUMOS ENERGETICOS	CIRCE	Spain
11	GIOUMPITEK MELETI SCHEDIASMOS YLOPOIISI KAI POLISI ERGON PLIROFORIKIS ETAIREIA PERIORISMENIS EFTHYNIS	UBI	Greece
12	CAVERION SUOMI OY (FINLAND)	CAV	Finland
13	INDEPENDENT POWER TRANSMISSION OPERATOR SA (GREECE)	IPTO	Greece
14	ATTIKI GAS SUPPLY COMPANY –HELLENIC COMPANY OF ENERGY SINGLEMEMBER SOCIETE ANONYME	EPA	Greece
15	PONIKVE EKO OTOK KRK D.O.O.	KRK	Croatia
16	Maggioli S.p.A.	MAG	Italy
17	KNOWLEDGEBIZ CONSULTING-SOCIEDADE DE CONSULTORIA EM GESTAO LDA	KBZ	Portugal
18	KONČAR – Inženjering za energetiku i transport d.d.	KONCAR	Croatia
19	UNIVERSITY OF CYPRUS	UCY	Cyprus
20	ELIN VERD S.A.	VERD	Greece
21	ENERGIE GUSSING GMBH	GUS	Austria
22	EUROPAISCHES ZENTRUM FUR ERNEUERBARE ENERGIE GUSSING GMBH	EEE	Austria
23	GECO GLOBAL IVS	GECO	Denmark
24	Energy Services Handels- und Dienstleistungs G.m.b.H.	ENES	Austria

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Table 2 – Coordinator details

SYNERGY contact details	
SYNERGY Project Manager	Eva Muñoz
Organisation	ETRA
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4 Quality Assurance Plan

The main goal of project management is to provide a focused, lean but effective framework to support the partnership in achieving the scientific, technical and business objectives of the project. Efficient decision-making processes and swift responsiveness to changing circumstances are required.

The quality of the project management is ensured by the Quality Assurance Plan. This section describes how SYNERGY will put into operation - from a very pragmatic perspective -, all the previously described principles, taking into consideration the specific strengths and constraints of the consortium. The goal is to define the management structure as well as the principles and procedures that, whilst being as flexible, agile and cost-efficient as possible, leave no room to subjective interpretation.

As a part of the Quality Assurance Plan, the project will apply an internal reviewing procedure to guarantee the quality of its results.

Moreover, a key aspect within the quality management is the project's risk management process, which is described in D1.4 Risk Assessment Report v1 and will be updated in D1.5 Risk Assessment-Report v2. A continuous risk assessment will allow that in case of problems, the required corrective actions are initiated in co-operation with the concerned partners.

4.1 Management structure

SYNERGY will be implemented by 24 partners. Its nature puts greater emphasis on decision-making mechanisms. Hence a shallow management hierarchy with transparency in the information flow is proposed to facilitate a team of empowered and motivated individuals to respond to the needs of new product development and commercialization. The management structure will have the following characteristics:

- Goal orientation – the project requires a determined management with a strong desire to "get things done".
- Agility – to allow adaptation to fast-moving technology dynamics and end-user demands.
- Empowerment/productivity – shallow hierarchy, information transparency and well-defined objectives.

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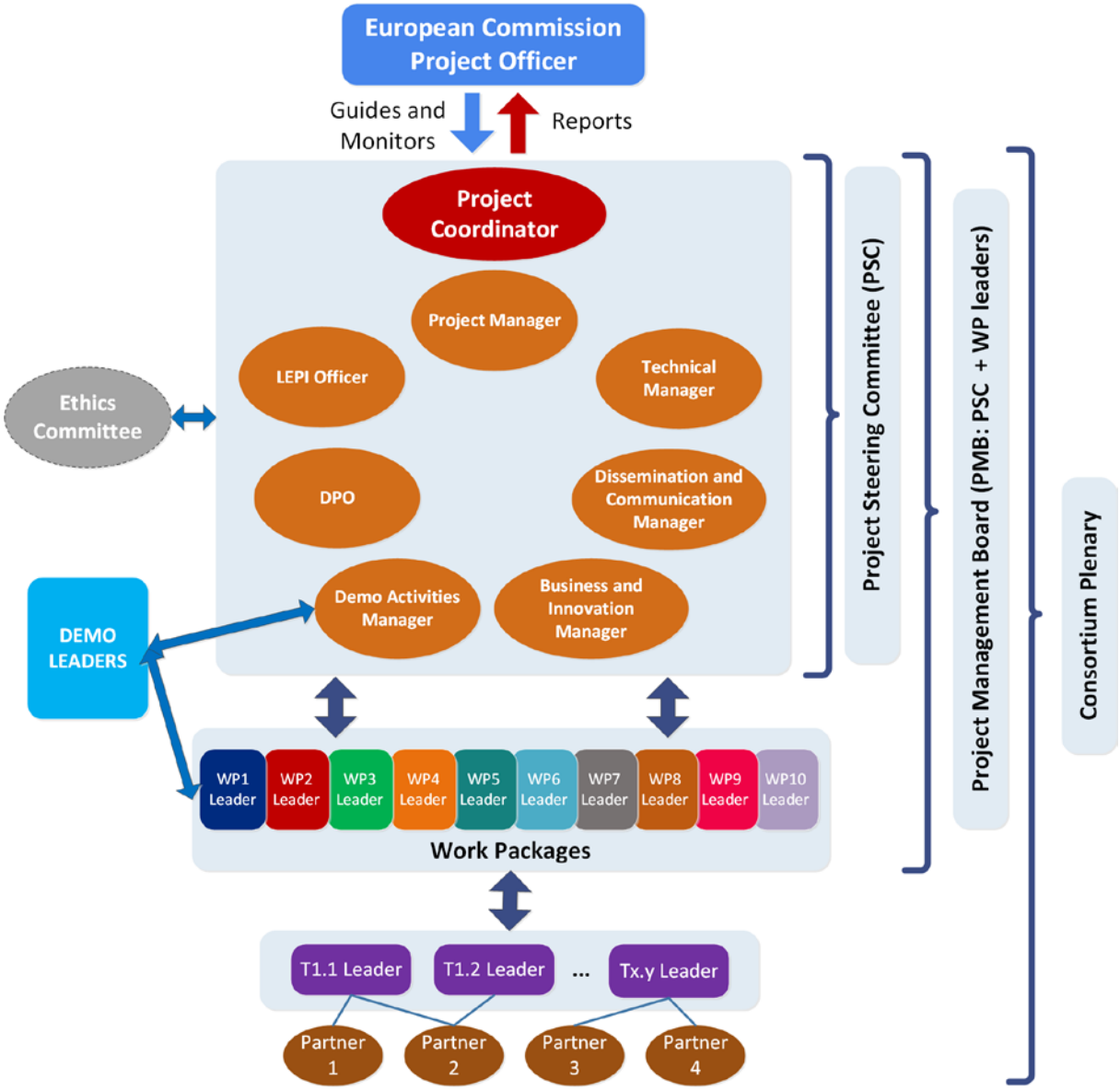

Figure 3 - SYNERGY Management Structure

The work to be done within SYNERGY is structured into a set WPs (led by WP leaders) which are at the same time divided into a set of tasks, led by Task Leaders (TL).

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, setting 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, etc.

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The PC will count with the support of the **Project Manager (PM)** on the day-to-day management activities of the project, such as the collection of administrative reports from partners, preparing and updating the Consortium Agreement between the participants, administering project resources and project spending, managing the overall ethical and gender issues, etc.

The PC and PM are supported in several management tasks such as monitoring the project's performance, managing the technical audits and supervising the preparation of the final deliverables by the **Project Steering Committee (PSC)** which comprises some additional roles:

- the **Technical Manager (TM),** who is responsible for the technical project aspects, e.g. strategic decisions regarding technical designs and implementations together with the PC, consistency of project results during the implementation phases;
- the **Dissemination and Communication Manager (DCOM)** who will be responsible for all dissemination and communication activities and direct interaction with end-users, mass media and energy sector stakeholders, as well as for the management of the project website structure, content and functionalities;
- the **Business and Innovation Manager (BIM)** will be in particular responsible for the exploitation activities and innovation management;
- the **Demonstration activities Manager (DEM)** will coordinate demonstration activities of the project;
- the **Legal and Policy Issues Officer (LEPI)** will be the coordinator of all the activities related to legal and policy issues that may arise in the project;
- the **Data Protection Officer (DPO)** will supervise the data protection and information security aspects including also the alignment with the new GDPR regulation.

Related to the latter, an **Ethical Advisory Committee (EAC)** will be established in the project acting as an independent advisory body to closely monitor any ethical issues that may arise in the project due to the management and processing of a multitude of datasets, while involving legal-related expertise to safeguard the legitimacy of the data-sharing contracts to be delivered as part of the project activities. Further detail on this EAC are provided in D1.3 Ethics Monitoring Report.

Reasons for any deviations from the project plan will be identified and the necessary corrective actions will be agreed by the PSC. Any differences between participants will be resolved by the PSC as they arise. Major changes in the project plan, such as reallocation of resources, may be done within the limits of agreements, by the decision of the PSC as put forward by the Project Coordinator. The PSC

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will convene at least every six months, in order to provide a quick and efficient response to the events that will arise during the project. The PSC meetings will precede the Plenary Meetings with the objective of preparing for them. Whenever possible, the PSC will use remote meeting technology.

Demo Leaders play a key role in this management structure, focusing on a project with a strong presence of demo sites and with a clear orientation to large scale demonstrations. This way, demo sites will have a partner in charge of representing the whole demo site in case of specific requirements coming from WPs or to prepare presentation during consortium meetings.

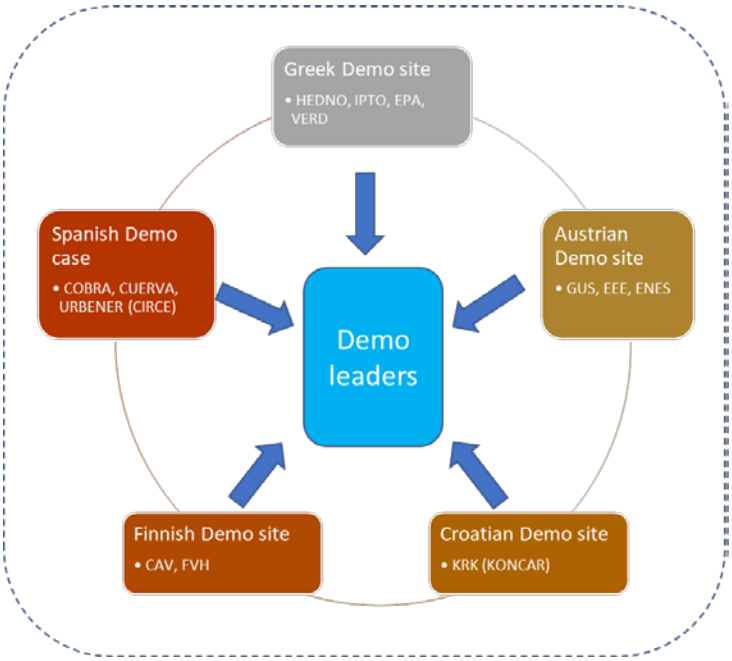

Figure 4 – Demo sites as part of the management structure

WP leaders (WPL) are responsible for activities and objectives specified in the Work Packages of the project plan, as well as for carrying out the respective deliverables with high quality and on time, and ensuring no delays in the accomplishment of the tasks. WPLs will coordinate the activities within the WPs.

Together with the PSC the WPL form **the Project Management Board (PMB)** which will convene once a month to discuss the progress of the individual WPs, to ensure that the work in progress is efficiently monitored and that any conflict or blocking issue is detected and addressed early.

Within each work package the **Task leaders (TL)** will be the directly 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. Last, all the partners are represented

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in the **Consortium Plenary (CP)** which 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. Dates of the meetings shall be announced by the Project Coordinator at least eight weeks prior to the meeting.

Project Coordinator	Antonio Marqués (ETRA)	**WP3 Leader**	Konstantinos Perakis (UBI)
Project Manager	Eva Muñoz (ETRA)	**WP4 Leader**	Evmorfia Biliri (S5)
Technical Manager	Fenareti Lampathaki (Suite5)	**WP5 Leader**	Aris Dimeas (ICCS)
Demonstration activities Manager	Dimitrios Stratogiannis (HEDNO)	**WP6 Leader**	Alberto Zambrano (ETRA)
Dissemination Manager	Thomas Mikkelsen (GECO)	**WP7 Leader**	Francesco Reda (VTT)
Business and Innovation Manager	Manuel Serrano (ETRA)	**WP8 Leader**	Dimitrios Stratogiannis (HEDNO)
LEPI Officer	Mari Carmen Bueno (ETRA)	**WP9 Leader**	Christophe Dromacque (GECO)
WP1 Leader	Eva Muñoz (ETRA)	**WP10 Leader**	Manuel Serrano (ETRA)
WP2 Leader	Sotiris Tsakanikas (VERD)		

Table 3 - Project Management Board (PMB)

Since SYNERGY objectives are ambitious, it cannot be exactly planned beforehand for its whole life span. This makes continuous planning and refinement of the project plan necessary. It is expected that a full cycle: planning -> execution -> analysis -> revision -> planning, etc. should take 3 months. The project Coordinator, ETRA, is certified with the standards ISO 9001:2015 [1], which specifies requirements for an effective quality management system at the scale that the SYNERGY project requires. Therefore, the management of the project will be based on the standard in order to assure the quality and conformity of the solutions and knowledge generated.

The SYNERGY Project Management Board has agreed on a monthly based system for follow-up and analysis of the tasks performed according to the project work plan. Therefore, online PMB meetings are arranged each month where WP leaders present the work in progress and discuss about blocking issues or interdependencies between tasks. This is a very efficient tool to perform the quality management cycle as described above, since it allows to revise the status of the work and adopting

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the corrective measures in case they are needed, while ensuring that barriers are detected and even anticipated.

4.2 Internal Reviewing Procedure

The internal reviewing procedure is one of the main tool to guarantee the high quality of the results.

Each WP leader will be responsible for the quality of the results, which will be subject to a peer review by at least two additional experts. The peer review team that must check their quality (not including the periodic progress reports), before the final submission to the EC. ETRA, as Project Coordinator, will review the progress reports containing resource-reporting information, as the last stage before submission to the EC.

The coordination team has elaborated a table which defines the partners in charge of the internal review of SYNERGY deliverables, ensuring a balanced workload for all of them not only in terms of the number of reports to be reviewed by each partner but also creating enough space in time to avoid several deliverables to be reviewed by the same partner in a short period of time. The table is shown in Annex A and it is also available in the Alfresco document library. Just to add that, even if this is not included in the table, both Suite5 as Technical Coordinator and ETRA as Project Coordinator will review the relevant deliverables when a project milestone is related.

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

The peer reviewers will review the document and send comments **within one week** using the peer review report template available at the repository as well as using the track changes mode in the draft version of the document. In case they encounter that the document does not fulfil the requirements for such document, they will notify accordingly the deliverable responsible partners within one week after the request.

The new version of the document will be again available for the deliverable responsible partner who will modify the document accordingly. Upon confirming with the peer reviewers that their comments

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have been effectively addressed, the final version will be sent to the Project Coordinator **at least 2 working days** before the delivery date.

In case the deliverable fulfils the required objectives, the Project Coordinator will submit it to the EC.

Whether the deliverable responsible partner fails to deliver the document, or the document does not fulfil the objectives, the Project Steering Committee will take the required actions according to the provisions of the Consortium Agreement and Contract.

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

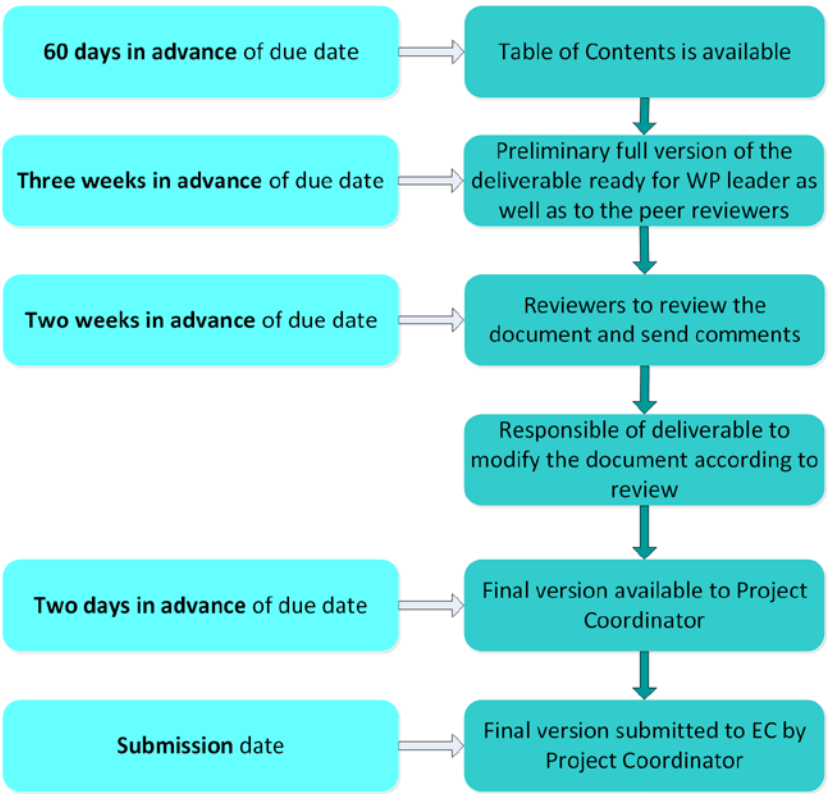

Figure 5 – Internal Review Procedure

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5 Decision making and conflict resolution

Decision making and conflict resolution processes have the objective to set the procedures, flows and rules based on these main principles:

- All partners have the same voting rights independently of their economic and technical contribution and
- Decisions to be taken in the PSC (min. quorum 4/5 of the members) will be taken upon 3/4 of the votes. Identification of any conflicts lies in the responsibility of each project participant.

Any signs of disagreement between project participants should be solved amicably between those partners involved. If not resolved at that level, and only if it is strictly necessary, a conflict resolution process must be enforced:

- SYNERGY participants will escalate the issue to higher management levels until it is resolved (to TL, WPL) and consensus to solve the problem will be seek at each level.
- Eventually, if still not resolved, the PSC will take care of the issue applying the same rules.

Some specific examples of the decision procedures are detailed as follows:

- Decisions regarding a technical issue of major importance, affecting the input, work content or the final outcome are expected to be made by the PSC led by the Project Coordinator and the Technical Coordinator. In general, all major technical issues and the related decisions are announced to all partners, even if the issue is not directly connected to their participation.
- Decision making for important matters within the frame of the Grant Agreement and the Consortium Agreement, especially when such decisions may affect the agreements reached in these two contracts, will be addressed by the PSC.
- Decision making in the administrative domain is the responsibility of the PC with the support of the PSC. Individual financial issues are primarily the responsibility of the partner itself.

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6 Communication guidelines

Communication will normally take place via e-mail, telephone or online tool (TEAMs, Skype, WebEX). This section contains a set of best practices to be followed in order to make the communication process easier.

6.1 Mailing lists

SYNERGY will use mailing lists whenever possible, with the objective to facilitate a smooth and fluent internal communication. Each Work Package Leader (WPL) is responsible for the management and animation of its WP. All partners should avoid email exchanges involving just part of the WP members so that all partners can keep integrated records of the activity in each WP and the whole project.

The mailing lists have been created with the contacts involved in the specific WPs (as requested by the partners), though it can be updated as needed at any time. The following mailing groups are available:

Mailing group	Purpose
all@synergyh2020.eu	Topic of common interest, general purpose
Demo@synergyh2020.eu	Demo partners, activities related to demo sites
Technical@synergyh2020.eu	Technical partners, activities related to technical developments
wp1@synergyh2020.eu	WP1 related activities
wp2@synergyh2020.eu	WP2 related activities
wp3@synergyh2020.eu	WP3 related activities
wp4@synergyh2020.eu	WP4 related activities
wp5@synergyh2020.eu	WP5 related activities
wp6@synergyh2020.eu	WP6 related activities
wp7@synergyh2020.eu	WP7 related activities
wp8@synergyh2020.eu	WP8 related activities
wp9@synergyh2020.eu	WP9 related activities
wp10@synergyh2020.eu	WP10 related activities
comm@synergyh2020.eu	Specific communication activities, as defined in the dissemination and communication plan.
livlab@synergyh2020.eu	Living Lab related activities

Table 4 – Mailing groups in SYNERGY

Some basic rules have to be followed for internal communication:

- To include the tag SYNERGY (or [SYNERGY]) always in the Subject of the e-mails
- To not use the @all group in case the topic is related to a certain WP discussion
- To refer to @wp1 for administrative issues

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The list of e-mail addresses and groups is available in the Alfresco site (see section 5.2) in an excel sheet that will be permanently up-to-date. The partners can check at any moment in which mailing group(s) they are included, and request a change. Modifications to this excel sheet -to add, remove or change an e-mail address- can be requested by filling the template *SYNERGY_TEMPLATE_MailingList_update* and sending it by email to the Dissemination Manager, who is in charge of maintaining the mailing groups and to periodically update them as well as the excel sheet according to everyone's requests.

6.2 Document repository

A document repository has been set up in order to facilitate the exchange of information. The tool selected has been Alfresco[1]. Alfresco is a flexible project management web application, which is open-source and released under the terms of the General Public License (GNU). SYNERGY will use the Alfresco tool as a document repository in order to maintain current and historical versions of files such as source code and documentation

The SYNERGY Alfresco repositories can be accessed through the following URL:

https://tecbox.etra-id.com/share/page/site/synergyh2020/

Each organization in the consortium has been granted with the credentials to access and modify the repository. The current structure includes a folder per WP, where all the information produced by the consortium or relevant to the project can be uploaded. 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. All the partners can create new directories in the same logical way, whenever it is needed.

[1] https://www.alfresco.com/es/

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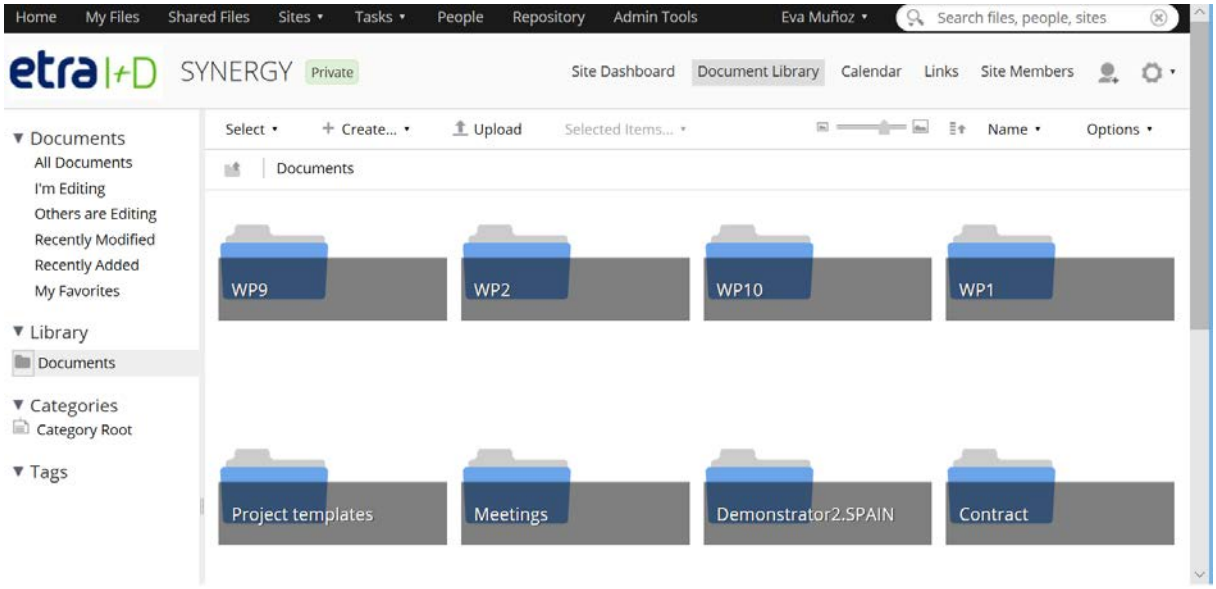

Figure 6 – SYNERGY Alfresco repository

6.3 SYNERGY logo and acronym usage

A specific project logo has been developed for the project identity. The logo will be included in all project promotional material including the factsheet, website, etc. The SYNERGY logo is built up of a customized fontset combined with three recognisable green diamonds. The diamonds symbol the interactions and synergy that the SYNERGY project is based on.

SYNERGY Logo	SYNERGY Acronym and full name
SYNERGY	SYNERGY Big Energy Data Value Creation within SYNergetic enERGY-as-a-service Applications through trusted multi-party data sharing over an AI big data analytics marketplace

Table 5 - SYNERGY Logo, Acronym and full name

Recommendations for reproduction quality and visibility:

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- To use only the logos that can be downloaded from the document repository Alfresco and do not copy them from any other place. Reproduction quality needs to be ensured.
- In order to ensure the logo's visibility, the minimum logo size for print is 5 cm in length. Online, the logo must not be smaller than 36 pixels at 72 ppi.

It is advised that the SYNERGY logo appears in all SYNERGY related documents. Any material co-funded with the project budget needs to make explicit reference to it – see Publication procedure– and if possible make use of the SYNERGY logo.

The Acronym of the project – i.e., SYNERGY – is the main representative mark and must be written always in the same way. When possible, it has to be used with the above-mentioned logo, respecting the font and colors.

6.4 Notification procedures

6.4.1 Notification to the Project Coordinator

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

- The person signing the document should be accordingly empowered to do it.
- Always sign the document by the authorised person: people in Forms A, 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.

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6.4.2 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. The EC banking details template is available at the Alfresco repository

The bank stamp and the signature of the bank representative are generally required. However, with an attached copy of the RECENT bank statement, the stamp of the bank and the signature of the bank's representative are not required. The signature of the account-holder and the date are ALWAYS mandatory.

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7 Reporting Procedure

7.1 Deliverables and documents

Deliverables will normally fall within the work to be done in the Work Packages, and as such, each WP leader will be responsible for the quality of results described in deliverables which will be subject to a peer review by at least two experts, according to the procedure described in section 5.2. The Consortium has elaborated a table to allocate the responsibilities for the peer-to-peer review of each deliverable, trying to ensure that all partners participate in this process in a balanced way and also to prioritize that at least one of the partners is from a different WP, when possible.

The templates for the deliverables are available at the project repository, one for public deliverables and another one for confidential deliverables. The document shall contain all the logos and it will be formatted according to this handbook recommendations.

Once the project coordinator has submitted the deliverable to the EC, the final documents will be also uploaded (both DOC and PDF version) in the Alfresco document library. Once the document is approved by the EC, in the case of a public deliverable, the document will be made available in the SYNERGY public web site.

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

7.2 Document numbering and naming convention

The deliverables are classified according to the following types:

- **R:** Document, Report
- **DEM**: Demonstrator, pilot, prototype
- **DEC**: Websites, patent filling, videos, etc.
- **OTHER:** Other
- **ETHICS:** Ethics requirement
- **ORDP**: Open Research Data Pilot

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

- **PU**: Public
- **CO**: Confidential, only for members of the consortium (including the Commission Services)

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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.

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

<dateYYYYMMDD>_SYNERGY_<dnum>_<dname>_<sec>_v<ver>.pdf

All the documents names start with the delivery date of the document, followed by the words "SYNERGY" in order to facilitate the identification with other project documents, and to raise the awareness of the project within a number of people that will download the documents from the public website. The fields <dnum> represents the code of the deliverable, <dname> the name of the deliverable as stated in the DoA, <sec> is filled with the acronyms related to dissemination level (e.g. co = confidential, pu = public) and <ver> the version of the document.

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 Handbook, being the security level public usage, delivered for example on 30th June 2020, would be named in the following way:

20200630_SYNERGY_D1.1_project_handbook_pu_v1.0.pdf

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

7.3 Document interchange format

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

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

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- It is recommended not to send attachments by e-mail but rather place them on the Alfresco project repository. Then, the person who has uploaded the document will notify it within the appropriate WP group, announcing the location where the document can be retrieved.
- The presentations will use the *.pptx/ppt format (or equivalent) according to the template available at the repository.
- All the documents to be forwarded outside the Consortium, including the presentations and the final deliverables, will use ONLY PDF format.
- The six monthly reports, which are part of internal reporting, have specific templates.
- The deliverables, interim milestone brief reports and documents must follow the format and styles indicated in the template available in the corresponding section of SYNERGY repository.
- These templates can evolve according to the project needs.

7.4 Meeting minutes and agenda

The reporting of meetings is mandatory to guarantee that the decisions taken are known and accepted by all the people working in the project.

The project coordinator will propose an agenda for each meeting at least 15 days in advance of the agreed date. The partner hosting the meeting will be responsible of producing the minutes following the template available at the project repository in no more than 15 days.

7.5 Six-monthly report

As part of an internal monitoring activity, every six months the coordinator will ask the partners to complete two documents to gather the (possibly estimated) basic information on the resources spent per partner and the work performed.

- Technical Report: the following table will be filled:

Main activities (related to Tasks)	Description (include contribution to deliverables)	Progress (Not started, On-going, Finished)

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- Financial report: the following information will be filled:

Personnel cost report

WP	S1 *6 month period*	
	PM	**Cost (€)**
WP1		
WP2		
WP3		
WP4		
WP5		
WP6		
WP7		
WP8		
WP9		
WP10		
Total	0	0,00 €

Other costs

WP	S1 *6 month period*
	Cost (€)
WP1	
WP2	
WP3	
WP4	
WP5	
WP6	
WP7	
WP8	
WP9	
WP10	
Total	0,00 €

The Six-monthly Report shall be available no later than 3 weeks after the end of the period. The project coordinator will analyse the reports, taking the requested actions in case of need.

7.6 Project Periodic Report

Three reporting periods are defined within SYNERGY work plan:

	Project Timing	Month/ Year
RP1	M1-M18	January 2020-June 2021
RP2	M19-M30	July 2021-June 2022
RP3	M31-M42	July 2022-June 2023

In order to provide timely project reporting to the Commission, as well as efficient and accurate financial data, the cost statements will be aggregated by each partner in the Project Periodic Report (PPR), which will be completed within the next 60 days form the end of period.

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The Project Periodic Report will follow the template provided by the EC for the H2020 Programme. It contains the periodic technical and financial reports.

The periodic technical report consists of two parts:

- Part A of the periodic technical report contains the cover page, a publishable summary and the answers to the questionnaire covering issues related to the project implementation and the economic and social impact, notably in the context of the Horizon 2020 key performance indicators and the Horizon 2020 monitoring requirements. Part A is generated by the IT system.
- Part B of the periodic technical report is the narrative part that includes explanations of the work carried out by the beneficiaries during the reporting period. Part B needs to be uploaded as a PDF document and will contain the following sections:
    - Explanation of the work carried out by the beneficiaries and Overview of the progress
    - Update of the plan for exploitation and dissemination of result (if applicable)
    - Update of the data management plan (if applicable)
    - Follow-up of recommendations and comments from previous review(s) (if applicable)
    - Deviations from Annex 1 and Annex 2 -DoA (if applicable)

The periodic financial report consists of:

- Individual financial statements (Annex 4 to the GA) for each beneficiary;
- Explanation of the use of resources and the information on subcontracting and in-kind contributions provided by third parties from each beneficiary for the reporting period concerned;
- A periodic summary financial statement including the request for interim payment.

The Project Periodic Report has to be consistent with the six-monthly reports provided both at technical and administrative levels.

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

ETRA will forward the Progress Periodic Report to the EC.

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7.7 Presentation, poster and graphical material

Any presentation related to the project work in progress or results will be created from the corporative presentation template available at the repository (two versions available: 4:3 or 16:9).

In addition to the available template, the consortium has prepared a number of alternative materials to help disseminate and present the project results in a coherent and effective way.

- A **general presentation** has been compiled to provide a quick look at the project objectives and contents. This set of slides will be updated periodically with the new results as the project advances.
- A **brochure** will be prepared to promote and enhance the visibility of the project.
- A **roll-up** to present the project at conferences and poster sessions.

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8 Dissemination

This section provides the basic procedures and information regarding the publication procedure in SYNERGY. The details about the dissemination and communication plan, target groups, and means of communication defined so far can be found in D9.6 Dissemination and Communication plan and Associated Materials [2].

In order to coordinate the participation of partners in dissemination activities and conferences (both in Europe and outside Europe) and properly notify the EC 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 should be circulated as soon as possible and no less than 45 days in advance of the event. The notification may be submitted to the PC, TC and the Dissemination Manager making use of the spreadsheet available at the Alfresco repository. It is advised to upload relevant Call for Papers (CFPs) ASAP in the repository 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 SYNERGY –i.e. networking, presentation of results, poster session, etc.
- Any partner in the consortium can publish its own results without previous permission, it only needs to notify the Dissemination Manager and fulfil the EC requirements hereafter identified. It is however preferred that common publications arise as a result of cooperation among the partners.
- Unless the 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 Community´s H2020 Programme and may display the European Commission H2020 emblem, when displayed in association with a logo, the European emblem should be given appropriate prominence. A pre-print or an abstract of the paper should be sent to the PC 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 Consortium is not liable for any use that may be made of the information contained therein.

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- If a result is shared by several partners, the publication needs the approval of all the partners involved. The notification submitted to the Project Coordinator will have to be circulated to all the partners involved. If there is no response, approval is granted.
- Participants may provide to the Coordinator and the Dissemination Manager, 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 PC.
- The provisions of the Contract and the Consortium Agreement should be taken into account in the dissemination of the results of the project.
- A quote like the following one should be included in any dissemination document produced by a partner:

  "This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 872734"

- 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 EU territory require previous approval of the EC.

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9 Conclusions

The SYNERGY cooperation processes and most relevant coordination information and guidelines are summarised in this document.

This Project Handbook offers a synthetic and high-value guide for all partners involved in SYNERGY in order to facilitate and assure that all actions and activities within the project are coherent and well-coordinated, while a proper level of flexibility is maintained to allow an agile development and coordination of the actions.

The document aims at maximising the impact of SYNERGY, optimising the coordination of efforts made by all partners, and providing tools and recommendations in order to improve the dissemination and communication impacts of the actions made by the partners.

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10 References

[1] ISO, “ISO 9001:2015. Quality management systems - Requirements,” 2015.

[2] SYNERGY Consortium, “D9.6 Dissemination and Communication plan and Associated Materials,” 2020.

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ANNEXES

This project has received funding from the European Union's Horizon 2020 Research and Innovation programme under Grant Agreement No 872734.

I. ANNEX A. Reviewers per deliverable

The following table shows the allocation of partners in charge of reviewing the SYNERGY deliverables. In red, the WP leaders are indicated. Blue cells show the partners that will do the peer review while the orange cells indicate that the PC, TC or WP leader will be also reviewing the document.

Nr	Name	Leader	Due date	ETRA	HEDNO	ICCS	FVH	VTT	CUE	COBRA	S5	URB	CIRCE	UBI	CAV	IPTO	EPA	KRK	MAG	KBZ	KONCAR	UCY	VERD	GUS	EEE	GECO	ENES
D1.1	Project handbook	ETRA	M06					x																		x	
D1.2	Data Management plan	ETRA	M06											x							x						
D1.3	Ethics monitoring report	ETRA	M06			x																			x		
D1.4	Risk assessment report 1	ETRA	M06							x			x														
D1.5	Risk assessment report 2	ETRA	M42				x												x								
D1.6	Open Call RFPs	ETRA	M24																				x			x	
D1.7	Open Call Projects monitoring report	EEE	M42	x									x							x							
D2.1	End-user and Business requirements analysis for big data-driven innovative energy services and ecosystems v1	VERD	M08									x												x			
D2.2	End-user and Business requirements analysis for big data-driven innovative energy services and ecosystems v2	VERD	M22												x			x									
D2.3	Socio-economic and regulatory analysis of obstacles to innovation v1	VERD	M08						x												x						
D2.4	Socio-economic and regulatory analysis of obstacles to innovation v2	VERD	M22													x											x
D2.5	Ex-Ante Pilot Audits and Pilot Deployment Plan	ETRA	M08		x						x												x				
D2.6	SYNERGY Framework Architecture including functional, technical and communication specifications v1	UBI	M12				x													x			x				
D2.7	SYNERGY Framework Architecture including functional, technical and communication specifications v2	UBI	M24										x						x				x				

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Nr	Name	Leader	Due date	ETRA	HEDNO	ICCS	FVH	VTT	CUE	COBRA	S5	URB	CIRCE	UBI	CAV	IPTO	EPA	KRK	MAG	KBZ	KONCAR	UCY	VERD	GUS	EEE	GECO	ENES
D3.1	SYNERGY Common Information Model	KONCAR	M12			x						x		x													
D3.2	Data Collection, Security, Storage, Governance & Management Services Bundles – Beta Release	UBI	M15					x	x																		
D3.3	SYNERGY Integrated Platform – Alpha, Mock-ups Release	MAG	M15							x				x	x												
D3.4	SYNERGY Integrated Platform & Open APIs – Beta Release	MAG	M18									x		x					x								
D3.5	Data Collection, Security, Storage, Governance & Management Services Bundles – Release 1.00	UBI	M21										x				x										
D3.6	SYNERGY Integrated Platform & Open APIs – Release 1.00	MAG	M24						x					x									x				
D3.7	Data Collection, Security, Storage, Governance & Management Services Bundles – Release 2.00	UBI	M33	x																						x	
D3.8	SYNERGY Integrated Platform & Open APIs – Release 2.00	MAG	M36	x										x													x
D4.1	SYNERGY Data Analytics, Sharing & Matchmaking Services Bundles – Beta Release	KBZ	M15								x								x								
D4.2	SYNERGY Baseline Data Analytics – Draft Release	S5	M20			x															x						
D4.3	SYNERGY Data Analytics, Sharing & Matchmaking Services Bundles – Release 1.00	S5	M21									x											x				
D4.4	SYNERGY Data Analytics, Sharing & Matchmaking Services Bundles – Release 2.00	S5	M33					x															x				
D4.5	SYNERGY Baseline Data Analytics – Final Release	S5	M40			x		x																			

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Nr	Name	Leader	Due date	ETRA	HEDNO	ICCS	FVH	VTT	CUE	COBRA	S5	URB	CIRCE	UBI	CAV	IPTO	EPA	KRK	MAG	KBZ	KONCAR	UCY	VERD	GUS	EEE	GECO	ENES
D5.1	Detailed functionality specification and design of the Asset Management Tool Suite for TSOs, DSOs and RES Operators	ICCS	M15											x									x				
D5.2	1st Version of the Asset Management Tool Suite for Network and RES plant Operators	ICCS	M22							x														x			
D5.3	Final Version of the Asset Management Tool Suite for Network and RES plant Operators	ICCS	M42		x										x												
D6.1	Detailed functionality specification and design of the EaaS Tool Suite for Energy Retailers and Aggregators	ETRA	M15													x				x							
D6.2	1st Version of the EaaS Tool Suite for Energy Retailers and Aggregators	ETRA	M22																			x			x		
D6.3	Final Version of the EaaS Tool Suite for Energy Retailers and Aggregators	ETRA	M42				x												x								
D7.1	Detailed functionality specification and design of the Optimized Energy Performance Management Suite	VTT	M15						x									x									
D7.2	1st Version of the Optimized Energy Performance Management Suite	VTT	M22				x							x													
D7.3	Final Version of the Optimized Energy Performance Management Suite	VTT	M42																				x				x
D8.1	SYNERGY Pre-trial validation testing results	ETRA	M24		x					x																	
D8.2	Detailed Demonstration Activities Management Plan	ETRA	M20		x																					x	
D8.3	Report on SYNERGY Deployment	ETRA	M24									x									x						
D8.4	SYNERGY Evaluation Framework and Respective Validation Scenarios	ICCS	M24	x	x									x													

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Nr	Name	Leader	Due date	ETRA	HEDNO	ICCS	FVH	VTT	CUE	COBRA	S5	URB	CIRCE	UBI	CAV	IPTO	EPA	KRK	MAG	KBZ	KONCAR	UCY	VERD	GUS	EEE	GECO	ENES
D8.5	SYNERGY Holistic Performance Evaluation, Impact Assessment and Cost-Benefit Analysis v1	ICCS	M33		x											x				x							
D8.6	SYNERGY Holistic Performance Evaluation, Impact Assessment and Cost-Benefit Analysis v2	ICCS	M42		x											x						x					
D8.7	SYNERGY Replication Roadmap	EEE	M42		x			x			x																
D9.1	SYNERGY Living Lab Activities Plan and Evaluation Report v1	GECO	M03	x																				x			
D9.10	Policy and market reform recommendations report v1	EEE	M33							x											x					x	
D9.11	Policy and market reform recommendations report v2	EEE	M42																		x	x				x	
D9.12	Report on activities for the promotion of SYNERGY standardization punch-list	KONCAR	M33		x												x									x	
D9.13	Report on activities for the promotion of SYNERGY standardization punch-list	KONCAR	M42			x																				x	x
D9.14	Report and Evaluation of Collaborative Activities with BRIDGE and BDVA v1	ETRA	M06													x									x	x	
D9.15	Report and Evaluation of Collaborative Activities with BRIDGE and BDVA v2	ETRA	M18																	x				x		x	
D9.16	Report and Evaluation of Collaborative Activities with BRIDGE and BDVA v3	ETRA	M30														x		x							x	
D9.17	Report and Evaluation of Collaborative Activities with BRIDGE and BDVA v4	ETRA	M42												x			x								x	
D9.2	SYNERGY Living Lab Activities Plan and Evaluation Report v2	GECO	M12																			x			x		

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Nr	Name	Leader	Due date	ETRA	HEDNO	ICCS	FVH	VTT	CUE	COBRA	S5	URB	CIRCE	UBI	CAV	IPTO	EPA	KRK	MAG	KBZ	KONCAR	UCY	VERD	GUS	EEE	GECO	ENES
D9.3	SYNERGY Living Lab Activities Plan and Evaluation Report v3	GECO	M24															x									x
D9.4	SYNERGY Living Lab Activities Plan and Evaluation Report v4	GECO	M36									x			x												
D9.5	SYNERGY Branding, Website and Social Media Channels	GECO	M06	x							x																
D9.6	SYNERGY Dissemination and Communication Plan and Associated Material v1	GECO	M06		x		x																				
D9.7	SYNERGY Dissemination and Communication Plan and Associated Material v2	GECO	M18			x		x																			
D9.8	SYNERGY Dissemination and Communication Plan and Associated Material v3	GECO	M30									x												x			
D9.9	SYNERGY Dissemination and Communication Plan and Associated Material v4	GECO	M42											x									x				
D10.1	Definition of novel data sharing-driven Business Models for Innovative Energy Services v1	ETRA	M08										x				x										
D10.2	Definition of novel data sharing-driven Business Models for Innovative Energy Services v2	ETRA	M33						x													x					
D10.3	Assessment of SYNERGY business models and evaluation of relevant economic KPIs v1	UCY	M30	x				x																			
D10.4	Assessment of SYNERGY business models and evaluation of relevant economic KPIs v2	UCY	M42	x		x					x																
D10.5	SYNERGY Market Radar v1	MAG	M15	x									x													x	

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Nr	Name	Leader	Due date	ETRA	HEDNO	ICCS	FVH	VTT	CUE	COBRA	S5	URB	CIRCE	UBI	CAV	IPTO	EPA	KRK	MAG	KBZ	KONCAR	UCY	VERD	GUS	EEE	GECO	ENES
D10.6	SYNERGY Market Radar v2	MAG	M30	x														x									x
D10.7	SYNERGY Market Radar v3	MAG	M42	x					x																x		
D10.8	SYNERGY Overall Exploitation Strategy and Individual Exploitation Plans v1	ETRA	M18							x										x							
D10.9	SYNERGY Overall Exploitation Strategy and Individual Exploitation Plans v2	ETRA	M36											x											x		
D10.10	SYNERGY Joint Venture Business Innovation Plan	ETRA	M42		x						x																
D11.1	H - Requirement No. 1	ETRA	M03										x									x					
D11.2	POPD - Requirement Nº. 2	ETRA	M03								x												x				

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