



PANTERA

Pan European Technology Energy Research Approach

Work Package 1

Deliverable D1.1

[D1.1 Project guidelines]

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Abbreviations

Acronym	Full name
AB	Advisory Board
BIM	Business Innovation Manager
EC	European Commission
GA	Grant Agreement
GenA	General Assembly
MS	Milestone
PC	Project Coordinator
PM	Project Manager
PMO	Project Management Team and Office
PO	Project Officer
S/T	Scientific/ Technical
SFR	Semestral financial report
STR	Semestral technical report
SC	Steering Committee
TL	Task Leader
PANTERA	Pan European Technology Energy Research Approach
PWR	Periodical work package reports
WBS	Work Breakdown structure
WP	Work Package
WPL	Work Package Leader

Executive Summary

The present deliverable D1.1, named Project Guidelines, is one of the first document delivered by WP1, covering the Project Management duties. This document is the natural evolution and combination of all initial project description documents, namely Description of Work (DoW), its evolution to the Grant Agreement (in which the project structure and roles were outlined) and the Consortium Agreement (in which the PANTERA partners arranged the way they will interact). More specifically, the D1.1 document covers all management-related activities, providing all required tools to efficiently organize the work flow.

Guidelines, definition of processes and procedures, identification of tools (including set-up), innovation management and publication practices (initial approach, to be further developed on Dissemination deliverables in WP8) are topics covered by this report. All aforementioned mechanisms and tools are analyzed in order to ease partner's contributions and building a common working framework for the project.

The following main areas are covered by this document:

- Management structure
 - Project roles and responsibilities, including both among partners and with the European Commission.
 - IT tools and document handling procedures
- Project management plan and work breakdown structure
- Innovation management
- Reporting procedures
- Publications

This can be considered as a living document, since it might be updated as the project progresses, due to responsibility changes, experiences and / or potential tool modifications. The updates –if any– are going to be included in the future project periodic reports.

1 Introduction

1.1 Purpose of the Document

D1.1, the Project Guidelines deliverable, covers all management-related activities, procedures and tools envisaged to be used inside PANTERA project. It serves as a handbook of PANTERA and it will be circulated to all partners.

1.2 Scope of the Document

This management report consolidates the initial work definition and role assignment done on initial project documents (DoW, GA and CA) and serves as placeholder for partner reference about the procedures, templates and practices to be applied during the project lifetime.

The European Commission is represented by the Project Officer (PO) Mario Dionisio (mario.dionisio@ec.europa.eu). Communication between the project and the commission is handled via the PO.

Please note that the report can be considered as a living document, to be updated all along the project duration. Thus, the version presented at its deadline (M2-February) compiles all tools set up initially and the procedures agreed to be used during all PANTERA lifetime. However, the document will be updated accordingly, in case of any change within the next 4 years through documents such as periodic project reports.

1.3 Structure of the Document

The process of covering all these topics in a comprehensive way led to the following structure for the document:

- **Section** Error! Reference source not found. describes the management structure and procedures, inherited from the Grant Agreement and consolidated here, including definition of roles (project and technical management, general assembly, steering committee, etc.), organization of meetings and information flow.
- **Section 3** presents the project management plan and work breakdown structure. Tasks are identified, relationships between tasks clearly highlighted and role assignment is done per each task and deliverable. Also, the interdependencies of the tasks are highlighted. Within this section, the innovation management is also tackled. Innovation already identified within the DoW document is detailed with identified potential exploitation plans.
- **Section 4** outlines the reporting procedure agreed among PANTERA partners and envisaged to assure the proper resource spending and project planning.
- **Section 5** details the way PANTERA organizes internally document and information sharing, including mailing lists, tools and templates.
- Finally, **Section 6** includes the first publication practices inherited from the Consortium Agreement, to be further detailed when delivering the first version of the platform and dissemination deliverables.

2 Management Structure and procedures

Under this section the management structure of PANTERA is explained. The document covers

- the internal role assignment,
- partners' duties and how all the constituent elements of the structure interact both internally and with external entities,
- The relations with the Commission handling all issues related to the funding of the project.

2.1. Organisational structures and decision-making

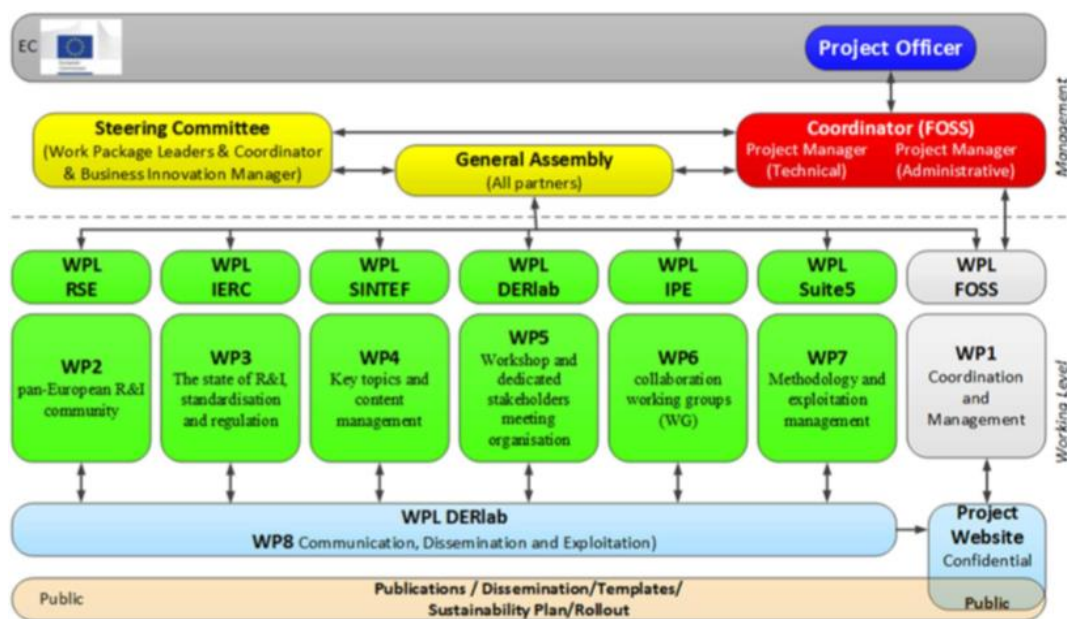


Figure 1. Overall project organization structure and governing rules.

PANTERA is structured so as to be managed through 3 main management entities, as depicted in Figure 1 and agreed on the Consortium Agreement. At the top of the structure, there is the **Coordinator (CO)**. To ensure that the project will operate in a truly integrated manner, strong central coordination will be provided by the Coordinator (FOSS) who acts as the overall project manager. The Coordinator will be assisted by the **Steering Committee (SC)** which is the primary decision body. It consists of the WP leaders, the Coordinator and the business innovation manager. Steering Committee decisions are made on simple majority with the Coordinator having a casting vote in case of a tie. For an effective and efficient technical management, a **Project Management Team and Office (PMO)** will be established to support the Coordinator, the Steering Committee, and the **Work Package Leaders (WPL)** at administration tasks and external relationships to ensure an efficient day-to-day management of PANTERA. The management structure is completed with the **Work Package Leaders (WPL)**, **Task Leaders (TL)** and the **Advisory Board (AB)**. All other information has to be communicated to the Coordinator, the Project Management Office and the Technical Coordination Team. Communication will mainly take place by e-mail and bi weekly web meetings, project status reports and project newsletters.

Monitoring progress is the main responsibility of the Coordinator. He fulfils this task with the help of the Work Package Leaders. Each Work Package Leader will formally report every 3 months to the Coordinator in a small report, informing on the progress of the work, including technical results, compliance with the work plan (incl. milestones) and problems arising.

The Coordinator will summarize and update the project status, reporting this to the EC. Decisions concerning normal running of the project and concerning strategy will be taken by the Steering Committee and with the goal to reach a consensus. The Steering Committee is the ultimate decision-making body in the project. **General Assembly (GenA)** is made up of one key representative of each consortium partner, and is responsible for key strategic decisions concerning PANTERA, affecting the consortium as a whole.

Figure 1 shows all potential interactions between all aforementioned entities and roles within PANTERA. Basically, all external interactions will be centralized on the figure of the PC, with punctual help by the Scientific and Technical manager (STM) on external technical activities. From that point, all PANTERA activities will be monitored and followed closely, so as to guarantee its proper performance. The outcomes will naturally flow back through the WPs to the STM and will be disseminated.

All internal PANTERA interactions are regulated through the CA document, agreed and signed by all partners. This document, regulates not only the aforementioned roles and interactions, but also the contingency mechanisms to be activated in case something wrong is detected. All partners reached consensus and agreement and signed the CA and the Grant Agreement prior to the project start. All these mentioned documents are available at <https://www.derlab-repo.net/products/files/#1016> and <https://www.derlab-repo.net/products/files/#876>

Together with the previously mentioned management entities, the pure technical management of the project is ensured through detailed additional structure breaking down the project objectives into WPs, and Tasks as seen in the Grant Agreement. PC, as a global coordinator and the Steering Committee are in charge of managing these activities, and is supported by **Work-package Leaders (WPL)**. They are responsible for providing the technical work plan and coordinating their respective WP, as well as acting as contact point providing support for other management entities such as quality assurance management and risk management board that will be analyzed in report D1.4 and D1.2 respectively. Also, **Task Leaders (TL)** are responsible for providing the technical work plan and coordinating their respective Tasks inside a particular WP, as well as acting as a contact point providing support for WPL.

The main management entities role is analyzed in more details below.

2.1.1 The Project Coordinator (PC): FOSS (prof. George Georghiou)

The PC is the central and key contact of PANTERA, as it is the official interface person with the EU Commission. In summary, all PC duties can be summarized as described in Table 1.

Table 1. PC duties.

Domain	Duty
Administrative	Monitoring participants obligations with respect to both the GA (including IPR, dissemination and use) and the CA.
General Assembly	Chairing GA sessions on meetings
	Administration and minute taking of GA sessions
Financial	Ensure all payments are made without (unjustified) delay
	Store financial records of project funding (per partner), informing the EU commission of such events.
Documentation and project tools	Define templates and standards for documents.
	Set up and maintain a project repository with relevant document information
	Review and assure the needed quality on all documentation prior to its delivery.

	Provide pertinent IT tools and make them available to all partners so as to enable cooperation and efficient information sharing.
EC Link	Present and explain comments received from the Commission
	Interface with the PO

These duties are mapped on the project lifetime as explained in Table 2, where all important deadlines are highlighted, together with the expected outcome, in the form of a document to be delivered.

Table 2. PC timeline.

Deadline	Deliverable
M2	Detailed guidelines for project-internal processes and management-related workflows
M2	This report will define the data management plan and all ethics requirements in processing of personal data as a detailed policy that will govern the activities throughout the project duration to facilitate access to, storage and re-use of the gestural data generated by the project.
M3	The consortium will conduct a risk management analysis in the first 4 weeks of the project and will adapt / modify as required the Risk Managing Activity plan
M3	ICT tools for coordination and management purposes: A suitable cloud platform like ONLYOFFICE, project website, communication facilities and definition of wide conference tools.
M3	This report will define all project quality control procedures, including a detailed description of project structure, partner responsibilities (Project Coordinator, WP Leaders, Task Leaders and additional participants in each Task), quality control mechanisms, documentation control, documentation formats and exchange rules.
M18/M36/M48	Two mid-term (M18 and M36 respectively) and one final report detailing progress of activities, best practice transfer achieved, coordination, and project financial status.

Financial management is also role of the PC. This includes receiving and transferring payments by the European Commission to the consortium partners, while keeping advance payments on a well identified account. This implies a need for financial accounting within the consortium, including:

- Consolidating individual cost reports from partners and subcontractors (including cost statement and certificate, person-month (PM) justification and financial summary) and reporting the overall project cost to the EC.
- Requesting audit certificates from each partner and subcontractor.
- Following income and expense plan execution
 - Monitoring the execution of provisional budget and deliverables in the Joint Programme of Activities.
 - Recovery of due sum and reports.

2.1.2 General Assembly (GenA)

The GeNA, as shown in Figure 1, is the responsible entity within PANTERA for taking the decisions concerning the overall direction and scope of the project. This is accomplished via strategic resolutions that will steer the project towards a specific agreed course.

The scope, thus, of this GeNA body is to take decisions on:

- Project budget, its allocation and potential modifications.
- Amendments of Grant Agreement.
- Monitoring reporting and management entities activities so that they are consistent with the IPR directives in the CA.
- Choice of the sharing tools to be used to distribute and share information.

The GeNA is chaired by the PC. The BIM of the Steering Committee is closely interacting with GeNA and should take part in GenA assembly. All other partners apart from the ones the PC and BIM belong to, should nominate a contact person to act as a GeNA member. This is done to assure all partners are represented and equally weighted on the decision-making voting process.

Table 3 includes the preliminary definition of contact points (both primary and substitute) nominated by each PANTERA partner so as to be members of the GeNA.

Table 3. GeNA member list.

General Assembly List			
N/A	Partner	Prime	Substitute
1	FOSS	Dr. Venizelos Efthymiou	Dr. Christina Papadimitriou
2	DERlab e.V.	Mohamed Shalaby	Ata Khavari
3	RSE	Luciano Martini	Carlo Tornelli
4	SINTEF	Andrei Morch	Oddbjorn Gjerde
5	IPE	Anna Mutule	
6	Suite5	Tasos Tsitsanis	George Papadopoulos
7	UCC-IERC	Shafi Khadem	
8	NUID UCD	Claire Cullen	Laura O'Gorman
9	TUS RDS	Metody Georgiev	Rad Stanev

For those particular meetings in which the prime contact for each party is not available, a backup substitute can be nominated. It is also possible to change the contact person for the GenA at any time, although maintaining a consistent nominee is considered the best practice for the sake of continuity.

All GenA sessions will be chaired by the PC. Participation of all partners is expected on all GenA sessions. This is critical when it comes to decisions. Two different types of decisions can be discussed in GenA sessions:

- Usual decisions. They are not considered critical.
 - They require at least 2/3 of representatives present
 - They require 3/4 of the votes to be approved
- Critical decisions.
 - All partners must be present
 - 100% of votes (unanimity) is required so as to approve it

Within the GenA, there are two prevalent roles, the PC and the BIM. They are both in charge of some specific duties, as listed in Table 4.

Table 4. PC and BIM duties within the GeNA.

Area	PC (prof. George Georghiou–FOSS)	BIM (Dr Venizelos Efthymiou)
Management	Coordinate and manage the progress of the project	Support the PC to manage the technical content and innovation of the project
	Provide management coordination between partners	Ensure the overall technical coordination and technical content of the project(supervision of the PC)
	Ensure overall technical coordination and technical content of the project	
	Maintain the overall project plan	Ensure that the project technical objectives are met in the most appropriate way to maximize innovation impact
Quality	Monitor overall technical progress and quality of results in cooperation with the Scientific & Technical Manager	Monitor the overall progress and quality of results to support the project coordinator
	Coordinate and take part in the deliverable approval	
EC / External links	Provide Management Reports to the Commission	Attend technical project meetings and give technical presentations both internally and externally
	Coordinate the Final Report and the Technical Audits	

2.1.3 Project Management Office (PMO)

The Project Management Office (PMO) within PC will include three Groups and Services.

- The **Financial Control** will monitor the Annual Cost Statements and will receive the Partner PMs and expenditure on an annual basis and provide feedback to the Partner, the PC, and the QAM, all in accordance to relevant EU guidelines. It will use specialized software for scheduling and reporting and will train its support staff to meet all EU requirements. The reporting procedure is explained in section 4.
- The **Secretariat** will be linked to the project's www and Collaboration site to receive process and disseminate all requests from Partners and EU daily. It will organise project meetings, workshops and reviews. It will also administer Calls of Tenders, central equipment provision, new Partners inclusion, etc. More information about the project meeting schedule is provided in next section.
- The **External relations** will handle all requests with external bodies (i.e. questions on project concept and results through the Internet, relation to the Press and Media), including follow-up of concentration activities with other activities of relevant stakeholders.

The PMO will provide feedback to the Partners upon request and will issue guidelines on several

issues regarding the required project administrative actions (timesheets, semi-annual reports, Cost Statements, allowable costs, etc.). Finally, this service will organise remote meetings for the managerial and administrative personnel of the Partners if needed.

2.1.4 Business & Innovation Management (BIM)

PANTERA will adopt and establish a User-Driven Innovation inspired environment to accelerate collaborative knowledge generation and integration against real R&I, market and end-user needs. This environment will allow for re-conceiving the intersection between policy, society and research & innovation, finding win – win outcomes and mutual benefits by tackling key societal challenges and problems. PANTERA will bring together all value chain stakeholders in an effort to leverage their multidisciplinary expertise towards setting the foundation for the efficient co-definition of future paths for advancing the R&I landscape and outcomes in the area of Smart Grids, Local Energy Systems and Storage.

Within the PANTERA User-Driven Innovation environment, a collaborative problem solving process will be established, through the deployment of a variety of networking and collaboration instruments (from workshops to the deployment of a collaborative platform), involving relevant stakeholders but also associated communities, altogether constituting a User-Driven Innovation Quadruple Helix (society, business, academia and government), in integrated collaboration activities for co-creation of shared value, cultivation of innovative ecosystems, unleash of exponential technologies and their extraordinarily rapid adoption, promotion of multidisciplinary experimentation, exploitation of shared social capital and creation of added value solutions directly addressing emerging societal needs. Participatory design principles will be followed to ensure direct involvement and active contribution. This will accelerate project implementation by enabling continuous feedback on the project outcomes towards meeting the needs of diverse markets and multi-context environments.

The PANTERA User-Driven Innovation Approach will promote and ensure new knowledge integration through the fusion of several diverse disciplines and domains. PANTERA will promote the cross-fertilization of ideas by:

- a) liaising and setting up a collaboration framework with scientific, technology, business and standardization initiatives/ networks/ associations related to project activities and,
- b) properly utilizing, exploiting and exchanging knowledge and results with past and on-going projects (specially focusing on projects positioned under the BRIDGE umbrella) and
- c) setting up a unique collaboration environment where all stakeholders will contribute to the realization of the 2030 roadmap by depositing their experiences, know

The PANTERA dissemination strategy and activities will ensure that the project outcomes (R&I priorities and Roadmap, publications, collaborative platform and co-creation instruments, methodologies, standardization punch lists, policy and market recommendations) are widely disseminated to the appropriate target communities, at appropriate times and via appropriate methods, and that external stakeholder who can contribute additional value to the development, evaluation, uptake and exploitation of these outcomes can be identified and encouraged to participate. To this end, the Stakeholder Ecosystem (SE) is expected to play a significant role, by supporting, among others, knowledge transfer and experience sharing within an Open Innovation Reinforcement Ecosystem.

The PANTERA dissemination strategy will not be limited to passive, a posteriori awareness and acceptance. Instead, dissemination is inherently embedded in most of project activities, from R&I landscaping and stakeholder identification, to content creation and open interaction and collaboration for knowledge cocreation, through the utilization of the SE as means to involve pan-European communities in the areas of Smart Grids, Storage and Local Energy Systems in all phases

of the project implementation. Awareness and engagement activities for the SE will comprise a fundamental element of these activities. Dissemination will actively support and promote the exploitation and future sustainability of project results. Driven by its collaborative nature, PANTERA is aligned with R&I, industry and market trends, and has the potential to impact the market shortly after project completion. Exploitation is tightly connected to several dissemination actions that implicitly and explicitly contribute to the timely exploitation of the project results, inside and beyond the consortium

The Business & Innovation Management (BIM) is responsible to fulfil the above and consists of the Scientific & Technical Manager, the Innovation Manager (IM), the Dissemination & Communication Manager (DCM), the Exploitation Manager (EM), as well as other external advisors. This panel will be responsible for

- Monitoring the evolution of the products related to the project in the market,
- Diagnosing the continuously evolving market needs,
- Continuously updating the main goals of the project in order to follow and fulfil the continuous market changes and
- Composing annual reports concerning the existing evolved market, the current position of the project in relation to them and the new decisions/arrangements made by the group and the consortium to produce innovative results.

This board will only meet once per year to check the current status of the stakeholders and the target areas to promote the innovative goals of PANTERA. Any decision taken by the BIM should be first reviewed and verified by the General Assembly which should provide a 2/3 agreement majority on it.

The following members are appointed to be members of the BIM.

Table 5. BIM members and roles

ROLE	Member	Partner
BIM	Dr. Venizelos Efthymiou	FOSS
S&T Manager	Dr. Christina Papadimitriou	FOSS
Innovation Manager	Tasos Tsitsanis	Suite5
Dissemination& Communication Manager	Melissa Setakhr	DERlab E.V.
Exploitation Manager	Mohamed Shalaby	

2.1.5 Advisory committee

It provides a space for external partners to participate in integration related activities and provides external feedback to PANTERA. The involvement of these stakeholders will extend the DERlab network and will provide valuable input to the Steering Committee. The Advisory Board will also have an important role in supporting dissemination and exploitation of project results. Members of the Advisory Board (with a good mix from industry and academia) have already been approached and they will be presented in the next version of this document.

2.1.6 Project meetings

Face to Face project meetings are important so as to closely follow up the project progress. In addition, physical meetings are also very productive when it comes to organizing work, managing collaborations and exchanging information between partners. All in all, those meetings are the perfect place to take major decisions concerning the overall project.

This way, PANTERA plans to hold 6 major coordination meetings. These meetings are potential place holders not only for WP technical discussions, but also for GenA, Steering committee and advisory board meetings as seen below.

At least one GenA meeting will be scheduled every year, and biweekly calls are organized to follow the technical items on the project. EC reviews are also scheduled, at least at month 18, 36 and 48. This way, the foreseen timeline of meetings on PANTERA is listed below:

Table 6. PANTERA coordination meetings

Brief overview of major PANTERA coordination meetings

Meeting	Contents	Participants	Frequency
Kick-off meeting	Detailed planning of the project Start of the project	Coordinator Project team members	Single event (physical meeting)
Steering Committee meeting	Board for all decisions relevant for the project Final evaluation of results Decision on the content of the reports to be sent to the EC	Coordinator Project Management team Advisory Board (as needed)	At least every 6 months (as physical meeting)
Advisory Board meeting	Assessment of project progress Instructions and feedback Exchange of experiences	Coordinator Project Management team Advisory Board	At least every 12 months Organized jointly with other project meetings
Technical Committee meeting	Coordination and management of the integrating activities Monitoring of WP progress	Coordinator Work Package Leader Project Management team	At least once per 2 weeks
Review meeting	Review of the project progress, outcome and status	Coordinator Technical Committee	Defined in the contract with the EC
Final meeting	Closing of the project	Coordinator Project team members	Single event (physical meeting)

Additional ad-hoc meetings, involving just one WP or a particular pilot inside PANTERA, may also take place, and will be scheduled based on the needs of the envisaged attendees. The feedback of those meetings will be forwarded to the Steering Committee (minutes).

3 Work Breakdown Structure (WBS)

The PANTERA is a 48 months project. The PANTERA Structure adheres to the project vision, thus making sure that the scientific and adopted technical methodology will sufficiently result in specific tangible achievements with respect to the corresponding objectives.

In particular, project activities are broken down into manageable sections of coherent tasks, which are grouped in total 9 WPs. The overall activities will take place as illustrated in **Error! Reference source not found.**

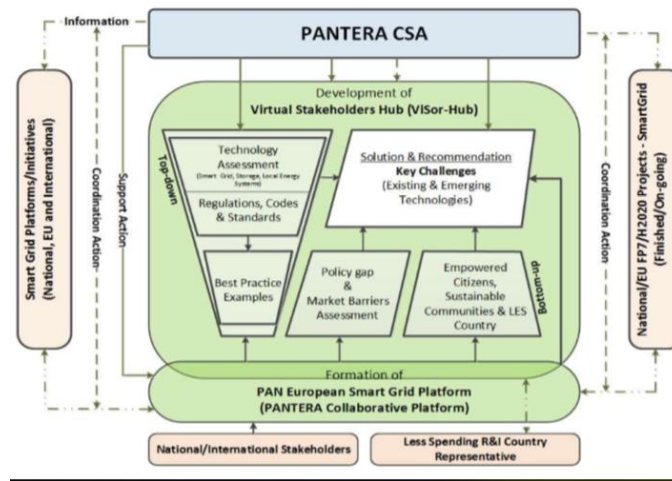


Figure 2. PANTERA Overall activities.

The PERT diagram outlines the interdependencies between the WPs, whereas the Gantt chart of the project provides the time schedule. All WPs are presented in the project Gantt chart (**Error! Reference source not found.**). The dependencies between the individual WPs can be seen in the following PERT diagram (Figure 4).

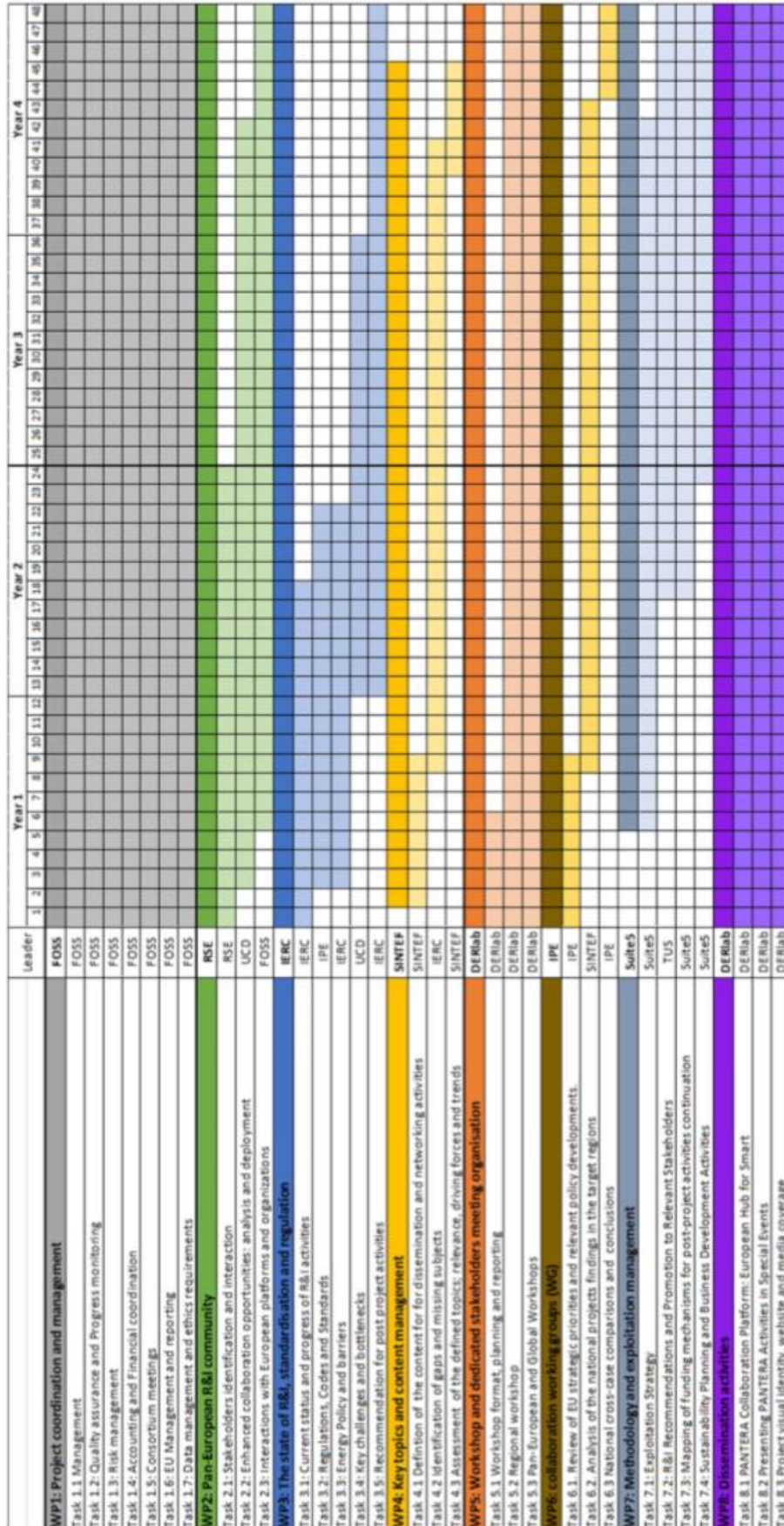


Figure 3. PANTERA Gantt chart.

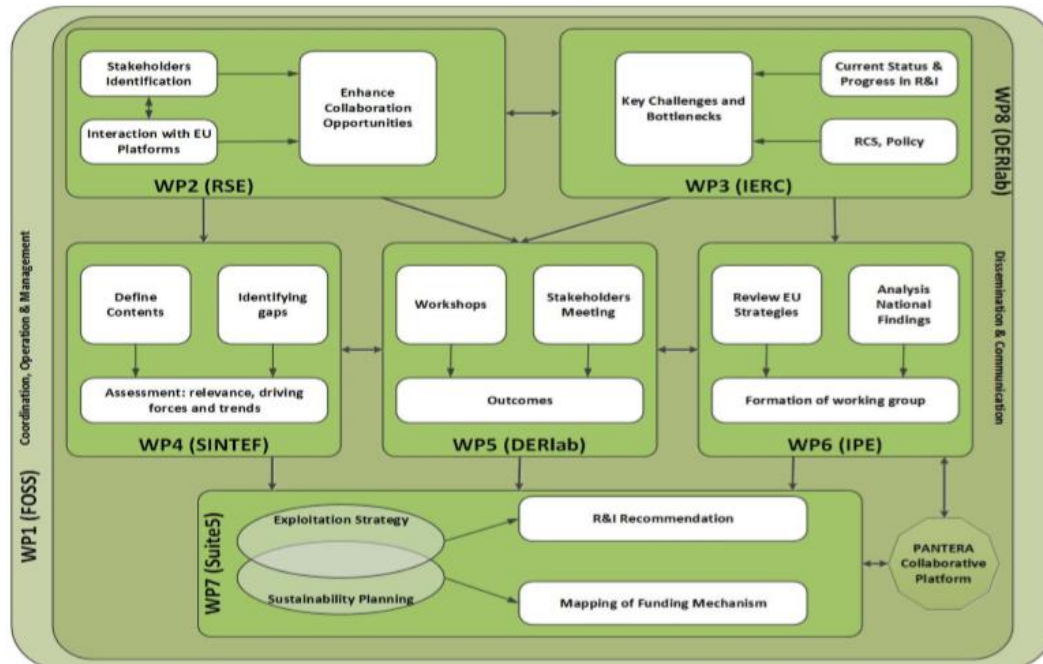


Figure 4. PANTERA PERT diagram.

Below each WP is summarized in a table, detailing each task with the following info that will be included:

- **Leaders.** Appointment of particular organization and contact person for each duty in the task, including the task itself, potential sub-tasks and deliverables.
- **Schedule.** Time plan and milestones associated with each task.
- **Deliverables.** All documents to be delivered by each task.
- **Dependencies.** Relationship of the task with other tasks either inside or outside the WP.

Table 7. WP1 WBS.

WP1. Project coordination and management [Months: 1-48]				
WP Leader	FOSS			
Task	T1.1. Management			
Task Leader	FOSS			
Starting date	M1	End date	M48	
Deliverables	Num	Title	Editor	DL
	D1.1	Project guidelines	FOSS	M2
Task	Task 1.2: Quality assurance and Progress monitoring			
Task Leader	FOSS			
Starting date	M1	End date	M48	
Deliverables	Num	Title	Editor	DL
	D1.2	Risk management report	FOSS	M3
Task	T1.3: Risk management			
Task Leader	FOSS			
Starting date	M1	End date	M48	
Deliverables	Num	Title	Editor	DL
	D1.3	ICT tools	FOSS	M3
	D1.4	Risk management report	FOSS	M3
Task	T 1.4: Accounting and Financial coordination			
Task Leader	FOSS			

Starting date	M1	End date	M48
Task	T1.5. Consortium meetings		
Task Leader	FOSS		
Starting date	M1	End date	M48
Task	T1.6: EU Management and reporting		
Task Leader	FOSS		
Starting date	M1	End date	M48
Deliverables	Num	Title	Editor
	DL		
	D1.6	1st Project progress report	FOSS
	D1.7	Mid-term Project Progress Report	FOSS
	D1.8	Final Project Progress Report	FOSS
Task	T1.7: Data management and ethics requirements		
Task Leader	FOSS		
Starting date	M1	End date	M48
Deliverables	Num	Title	Editor
	DL		
	D1.5	Data Management Plan	FOSS

Table 8. WP2 WBS.

WP2. Pan-European R&I community [Months: 1-48]				
WP Leader	RSE			
Task	T2.1. Stakeholders identification and interaction			
Task Leader	RSE			
Starting date	M1		End date	M24
Deliverables	Num	Title	Editor	DL
	D2.1	Report on stakeholder's identification and interaction	RSE	3
Dependencies	Task/WP	Nature	Description	
	T2.2	Output to T2.2	By identifying stakeholders and interaction one can develop a solid plan on how the collaboration opportunities can be enhanced among these parties.	
	T2.3	Input/Output	These two tasks interact with each other to achieve their objectives	
	T3.1	Input / Output	The two tasks will interact with each other. Identification of the current status and progress in R&I activities in the technologies is easier when stakeholders are mapped. In some cases the vice versa starting point from technologies leading to stakeholders engaged are helpful too.	
	T4.1	Output to T4.1	T2.1 will drive T4.1 as the map of topics and activities needs firstly the list of stakeholders.	
	T5.1/T5.2/T5.3	Output to WP5	The mapping of stakeholders will give feedback to the whole WP5 for workshop and dedicated stakeholders' meeting organization.	
	T6.2	Output to T6.2	Stakeholders identification and interaction are needed to address the activities of WT2 as described in WP2	
	T7.1	Output to T7.1	The outcomes of T2.1 are critical to path an exploitation strategy	
Task	T 2.2: Enhanced collaboration opportunities: analysis and deployment			
Task Leader	UCD			
Starting date	M3		End date	M42
Deliverables	Num	Title	Editor	DL
	D2.2	Report on Enhanced collaboration opportunities	NUID UCD	42
Dependencies	Task/WP	Nature	Description	

	T2.1	Takes Input from T2.1	The stakeholders mapping and their interaction is a prerequisite for proceeding with T2.2 objectives
	T2.3	Output to T2.3	After identifying collaboration opportunities we can proceed with approaching the collaborations with other European Initiatives
	T.7.1	Output to T7.1	The outcomes of T.2.2 are critical to path an exploitation strategy
Task	T2.3: Interactions with European platforms and organizations		
Task Leader	FOSS		
Starting date	M6	End date	M48
Deliverables	Num	Title	Editor
	D2.3	1st Report on interactions with European platforms and organizations	RSE
	D2.4	Final Report on interactions with European platforms and organizations	RSE
Dependencies	Task/WP	Nature	Description
	T2.1	Input from	These two tasks interact with each other to achieve their objectives
	T2.2	Input from	The stakeholders mapping and their interaction is a prerequisite for proceeding with T2.3 objectives

Table 9. WP3 WBS.

WP3. The state of R&I, standardisation and regulation [Months: 1-48]			
WP Leader	UCC-IERC		
Task	T3.1. Current status and progress of R&I activities		
Task Leader	UCC		
Starting date	M1	End date	M18
Deliverables	Num	Title	Editor
	D3.1	Report on current status and progress in R&I activities: Technology	UCC
Dependencies	Task/WP	Nature	Description
	T2.1.	Input/output	The two tasks will interact with each other. Identification of the current status and progress in R&I activities in the technologies is easier when stakeholders are mapped. In some cases the vice versa starting point from technologies leading to stakeholders engaged are helpful too.
	T3.4	Output to T3.4	In order to identify the key challenges and bottlenecks on technology, the report of T3.1 is a prerequisite
	T4.1	Output to T4.1	T3.1 outcome is crucial for T4.1 analysis.
	T7.1	Output to T7.1	The outcomes of T.3.1 are critical to path an exploitation strategy
Task	T3.2: Regulations, Codes and Standards		
Task Leader	IPE		
Starting date	M3	End date	M22
Deliverables	Num	Title	Editor
	D3.2	Report on RCS in EU-28	UCC
Dependencies	Task/WP	Nature	Description
	T3.4	Output to T3.4	In order to identify the key challenges and bottlenecks on technology, the report of T3.2 is a prerequisite
Task	T3.3: Energy Policy and barriers		
Task Leader	IERC		

Starting date	M3		End date	M22	
Deliverables	Num	Title		Editor	DL
	D3.3	Report on community energy policy and barriers		UCC	24
Dependencies	Task/WP	Nature		Description	
	T3.4	Output to T3.4		In order to identify the key challenges and bottlenecks on technology, the report of T3.3 is a prerequisite	
	T4.1	Output to T4.1		T3.3 outcome is crucial for T4.1 analysis.	
	T4.2	Output to T4.2		T3.3 outcome is crucial for T4.2 analysis.	
	T6.2	Output to T6.2		The outcomes of this package gives feedback for the stakeholders consultation by region and in European level	
Task	T3.4. Key challenges and bottlenecks				
Task Leader	UCD				
Starting date	M13		End date	M36	
Deliverables	Num	Title		Editor	DL
	D3.4	Initial report on key challenges and bottlenecks		UCD	38
Dependencies	Task/WP	Nature		Description	
	T3.1/T3.2/T3.4	Takes input from		In order to identify the key challenges and bottlenecks on technology, the report of T3.1/T3.2/T3.3 are a prerequisite	
	T3.5	output		The outcome of this task will drive the recommendations for the sustainability of this project.	
	T4.2	Output to T4.2		T3.4 outcome is crucial for T4.2 analysis.	
	T5.2	output		The outcomes of this package gives feedback for the workshop thematics by region and in European level	
	T6.1/T6.2	output		The outcomes of this package gives feedback for the stakeholders consultation by region and in European level	
Task	T3.5: Recommendation for post project activities				
Task Leader	IERC				
Starting date	M13		End date	M48	
Deliverables	Num	Title		Editor	DL
	D3.5	Roadmap to 2030		UCD	46
Dependencies	Task/WP	Nature		Description	
	T3.4	Input from		T3.4 drive the recommendations for the sustainability of this project.	
	T5.2	output		The outcomes of this package gives feedback for the workshop thematics by region and in European level	
	T6.1/T6.2	output		The outcomes of this package gives feedback for the stakeholders consultation by region and in European level	

Table 10. WP4 WBS.

WP4. Key topics and content management					
WP Leader	SINTEF				
Task	T4.1. Definition of the content for dissemination and networking activities				
Task Leader	SINTEF				
Starting date	M2		End date	M9	
Deliverables	Num	Title		Editor	DL
	D4.1	Content and topics for dissemination and networking activities		SINTEF	9
Dependencies	Task/WP	Nature		Description	

	T2.1	Takes input from T2.1	Definition of the content for dissemination and networking activities takes input from the review of T2.1	
	T3.1/T3.3	Takes input from	In order to define the content of the regional activities input from 3.1 and 3.3 are needed.	
	T4.3	Gives output	Assessment of the topics needs the content first	
	T5.1/T5.2	Input/output	The two tasks needs to interact in order to secure the highest impact and success of workshop and network activities	
Task	T4.2 Identification of gaps and missing subjects			
Task Leader	IERC			
Starting date	M9		End date	M41
	Num	Title	Editor	DL
	D4.2	1st report on Identification of gaps and missing subjects	SINTEF	12
	D4.3	Final report on Identification of gaps and missing subjects	SINTEF	30
Deliverables				
	Task/WP	Nature	Description	
	T3.3/T3.4	Takes input	Outcomes of T3.3 and T3.4 are needed for the analysis of T4.2	
	T4.3	Gives output	Assessment of the topics needs the gaps identification first	
	T5.2	Input/output	The two tasks needs to interact in order to secure the highest impact and success of workshop and network activities	
Dependencies				
Task	T4.3 Assessment of the defined topics; relevance, driving forces and trends			
Task Leader	SINTEF			
Starting date	M40		End date	M45
	Num	Title	Editor	DL
	D4.4	Assessment of the defined topics; relevance, driving forces and trends	SINTEF	33
Deliverables				
	Task/WP	Nature	Description	
	T4.1	Takes input	Assessment of the topics needs the content first	
	T4.2	Takes input	Assessment of the topics needs the gaps identification first	
	T5.2	Takes input	The two tasks needs to interact in order to secure the highest impact and success of workshop and network activities	
	T7.1/T7.2	Provides output	Assessment of the defined topics provides input to the strategy and business development plan	
Dependencies				

Table 11. WP5 WBS.

WP5. Workshop and dedicated stakeholders meeting organizations [M1-M48]				
WP Leader DERlab e.V.				
Task T5.1. Workshop format, planning and reporting				
Task Leader DERlab				
Starting date M1		End date		M6
Deliverables	Num	Title	Editor	DL
	D5.1	Workshop Format	DERlab	M3
Dependencies	Task/WP	Nature	Description	
	T2.1	Gets input from	The mapping of stakeholders will give feedback to the whole WP5 for workshop and dedicated stakeholders' meeting organization.	

	T4.1	Input	The two tasks needs to interact in order to secure the highest impact and success of workshop and network activities		
	T5.2	output	Workshops and meetings design and elaboration leads the actual events		
	T6.1	Input/output	In order to design the workshops and meetings, feedback from review analysis packages is needed.		
Task T5.2. Regional Workshops					
Task Leader	DERlab				
Starting date	M1		End date	M48	
Deliverables	Num	Title		Editor	DL
	D5.2	Report on the outcomes of regional Workshops (intermediary		DERlab	24
	D5.3	Report on the outcomes of regional Workshops (final)		DERlab	48
Dependencies	Task/WP	Nature		Description	
	T2.1	Gets input from		The mapping of stakeholders will give feedback to the whole WP5 for workshop and dedicated stakeholders' meeting organization.	
	T3.4	Gets input from		The outcomes of this package gives feedback for the workshop thematics by region and in European level	
	T3.5	Gets input from		The outcomes of this package gives feedback for the workshop thematics by region and in European level	
	T4.1/T4.2/T4.3	Input/output		The two tasks needs to interact in order to secure the highest impact and success of workshop and network activities	
	T5.1	Gets input from		Workshops and meetings design and elaboration leads the actual events	
	T6.1/T6.2/T6.3	Input/output		Outcomes of the workshops and meetings interact with review analysis packages.	
	T7.1/T7.2	Output to		The regional workshops can provide lessons learned and contribute to further exploitation	
Task T5.3 Pan-European and Global Workshops [M1-M48][DERlab]					
Task Leader	DERlab				
Starting date	M1		End date	M48	
Deliverables	Num	Title		Editor	DL
	D5.4	Report on the outcomes of Pan-European and Global Workshops (intermediary)		DERlab	24
	D5.5	Report on the outcomes of Pan-European and Global Workshops		DERlab	48
Dependencies	Task/WP	Nature		Description	
	T2.1	Gets input from		The mapping of stakeholders will give feedback to the whole WP5 for workshop and dedicated stakeholders' meeting organization.	
	T3.4	Gets input from		The outcomes of this package gives feedback for the workshop thematics by region and in European level	
	T3.5	Gets input from		The outcomes of this package gives feedback for the workshop thematics by region and in European level	
	T7.1/T7.2	Provides output		Assessment of the defined topics provides input to the strategy and business	

		development plan
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Table 12. WP6 WBS.

WP6. Collaboration working groups (WG) [Months: 1-48]				
WP Leader	IPE			
Task	T6.1. Review of EU strategic priorities and relevant policy developments.			
Task Leader	IPE			
Starting date	M1		End date	M9
Deliverables	Num	Title	Editor	DL
	D6.1	Report on identification/ selection of stakeholders within the national/ regional desks	IPE	M3
Dependencies	Task/WP	Nature	Description	
	T5.1/T5.2/T5.3	Input/output	In order to design the workshops and meetings, feedback from review analysis packages is needed.	
	T3.4/T3.5	Takes input from	The outcomes of WP3 gives feedback for the stakeholders consultation by region and in European level	
	T6.3	Provides output	In order to identify potential solutions, the outcomes of T6.2 need to be employed	
Task	T6.2 Analysis of the national projects, findings in the target regions			
Task Leader	SINTEF			
Starting date	M1		End date	M43
Deliverables	Num	Title	Editor	DL
	D6.2	Stakeholder consultation plans (one for each country/region)	IPE	5
	D6.3	Consolidated summary report of desk activities in the target regions	IPE	22
Dependencies	Task/WP	Nature	Description	
	T2.1	Takes input from	The list of stakeholders is a prerequisite to proceed with the analysis of WT6.2	
	T3.3/3.4/T3.5	Takes input from	The outcomes of WP3 gives feedback for the stakeholders consultation by region and in European level	
	T5.2/T5.3	Input/output	Interaction of both review analysis packages is needed.	
	T6.3	Provides output	In order to identify potential solutions, the outcomes of T6.2 need to be employed	
	T7.1/T7.2	Provides input	Analysis and regional findings of the workshops, provide input to the strategy and business development plan	
T6.3 National cross-case comparisons and conclusions				
Task Leader	IPE			
Starting date	M44		End date	M48
Deliverables	Num	Title	Editor	DL
	D6.4	Catalogue of potential solutions to overcome acceptance barriers for each country	IPE	26
Dependencies	Task/WP	Nature	Description	
	T6.1/T6.2	Takes input from	In order to identify potential solutions, the outcomes of T6.1/T6.2 need to be employed	
	T5.2/T5.3	Input/output	Interaction of both review analysis packages is needed.	
	T7.1/T7.2	Provides input	Analysis and regional findings of the workshops, provide input to the strategy and business development plan	

Table 13. WP7 WBS.

WP7. Methodology and Exploitation Management [Months: 6-48]				
WP Leader	Suite5			
Task	T 7.1 Exploitation Strategy			
Task Leader	Suite5			
Starting date	M6		End date	M42
Deliverables	Num	Title	Editor	DL
	D7.1	Exploitation Strategy and Plan		Suite5 42
Dependencies	Task/WP	Nature	Description	
	T2.1/T2.2	Takes input from	The outcomes of T2.1 and T.2.2 are critical to path an exploitation strategy	
	T3.1	Takes input from	The R&I status are critical to path an exploitation strategy.	
	T4.3	Takes input from	Assessment of the defined topics provides input to the strategy and business development plan	
	T5.2/5.3	Takes input from	Assessment of the defined topics provides input to the strategy and business development plan	
	T6.2/T6.3	Takes input from	Analysis and regional findings of the workshops, provide input to the strategy and business development plan	
	T7.3/T7.4	Output to	The D7.2 outcomes together with D7.1 feed the tasks T7.1 and T7.2 to provide the sustainability and business development of the PANTERA project	
Task	T7.2 R&I Recommendations for future Smart Grids and Promotion to Relevant Stakeholders			
Task Leader	TUS			
Starting date	M18		End date	M48
Deliverables	Num	Title	Editor	DL
	D7.2	Report on the promotion of Key Mid-term R&I Priorities for Smart Grids	TUS	48
Dependencies	Task/WP	Nature	Description	
	T4.3	Takes input from	Assessment of the defined topics provides input to the strategy and business development plan	
	T5.2/5.3	Takes input from	Assessment of the defined topics provides input to the strategy and business development plan	
	T6.2/T6.3	Takes input from	Analysis and regional findings of the workshops, provide input to the strategy and business development plan	
	T7.3/T7.4	Output to	The D7.2 outcomes together with D7.1 feed the tasks T7.1 and T7.2 to provide the sustainability and business development of the PANTERA project	
T7.3 Mapping of funding mechanisms for post-project activities continuation				
Task Leader	Suite5			
Starting date	M18		End date	M48
Deliverables	Num	Title	Editor	DL
	D7.3	Report on Appropriate Funding Instruments to ensure Project Sustainability	Suite5	42
Dependencies	Task/WP	Nature	Description	
	T7.1/T7.2	Takes input from	The D7.2 outcomes together with D7.1 feed the tasks T7.1 and T7.2 to provide the sustainability and business development of	

			the PANTERA project		
	T7.4	Output to	D7.3 drives the sustainability planning.		
T7.4 Sustainability Planning and Business Development Activities.					
Task Leader	Suite5				
Starting date	M24		End date		M48
Deliverables	Num	Title		Editor	DL
	D7.4	Sustainability and Business Development Plan		Suite5	42
	D7.5	Report on Preliminary Business Development Activities		Suite5	48
Dependencies	Task/WP	Nature	Description		
	T7.1/T7.2/T7.3	Takes input from	The D7.2 outcomes together with D7.1 feed the tasks T7.1 and T7.2 to provide the sustainability and business development of the PANTERA project		

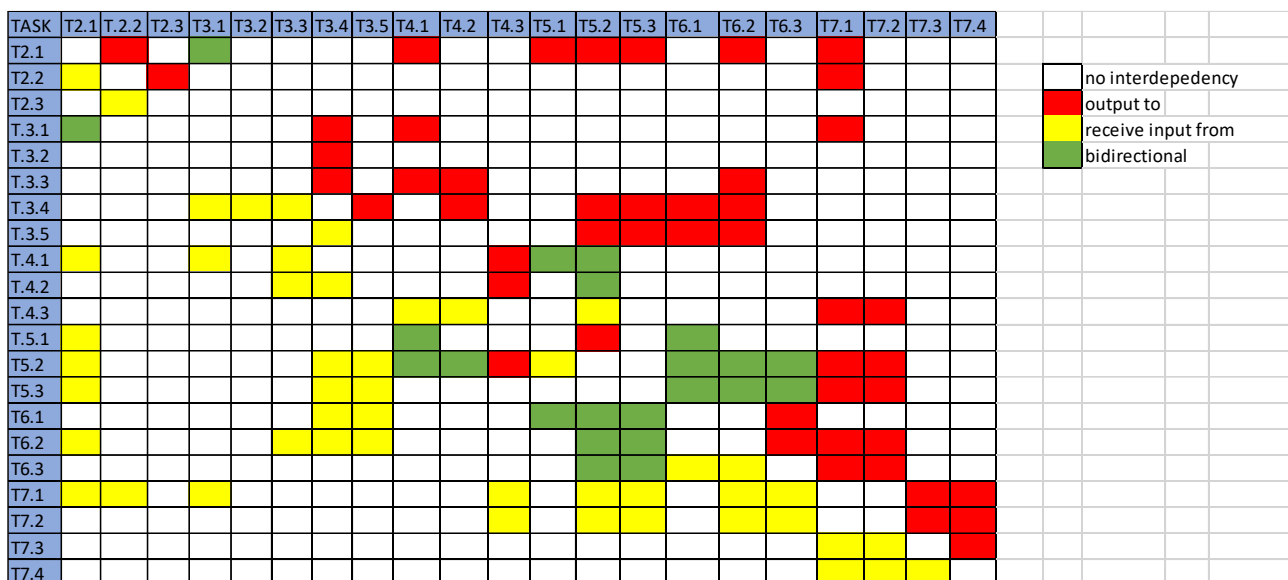


Figure 3. Cross-task relationships.

4 Reporting procedures

This chapter summarizes the way PANTERA plans to schedule all needed actions so as to deliver the periodical reports for the project, scheduled at M18, M36 and M48. The idea is keeping the PMO updated every 6 months about the partner specific financial and technical achievements. This way, corrective actions could be performed prior to the agreed periodical review with the EC, assuring this way the minimization of deviations.

The project reporting is based, thus, on:

- Deliverables to be provided on that time frame
- All Semestral management reports, compiled by
 - Semestral technical report by partner
 - Semestral financial report by partner

- Project Periodical report (or Final report), made up of
 - Review of semestral management reports for that period
 - Periodical report by work package

All reports will be made available for the European Commission as committed in the Grant Agreement. The PC will make sure they are uploaded on time and with all relevant data included. The documents envisaged to be filled in by PANTERA partners are described in more detail below, identifying the responsible entity, the content to be included and the deadlines.

Semestral technical report (STR) by partner is a partner summary structured by work packages and shall be available for PC/Steering Committee not later than 2 working days after the end of each quarter.

A document template is set up for all partners to introduce the semester achievements of PANTERA. A table format is provided. For each task on each WP in which the specific partner is active at each semester, bullet point or small paragraph format inputs can be introduced to motivate the work done on that period. An example of the table format for that purpose is shown in Table 14.

Table 14. STR table format.

Task		Work done during the period
WPX	TX.1	• Bullet point descriptive achievements per task
	TX.2	• Bullet point descriptive achievements per task
	...	

In addition, there is a dedicated section on this document to introduce potential publication and/or dissemination activities carried out by a partner during that semester.

Semestral financial report (SFR) by partner is a summary of the financial resources consumed by each partner allowing for relevant budget justification.

This document must directly match the work reported on the STR. There cannot be allocation of effort on a task with any activities reported.

An excel document template is provided so that partners can give their feedback each semester in terms of:

- Planned effort for the future
- Real effort allocated on that semester
- Justification of direct costs, including travel, equipment and other
- Justification for subcontracting activities

The summary of all these inputs will be reflected on the first sheet of the excel template, as shown in Table 15.

Table 15. SFR template.

Expenditures for the reference period (EURO):				
S1	Personnel costs	Other direct costs	Indirect costs	Requested Grant
Total costs	XXX	XXX	XXX	XXX
Expenditures for the project (EURO):				

	Personnel costs	Other direct costs	Indirect costs	Requested Grant
Total costs	XXX	XXX	XXX	XXX
Requested EC Contrib.	XXX	XXX	XXX	XXX

Periodical work package reports (PWR) shall be delivered by each work package leader to the PC/STM not later than 9 working days after the last semester prior to the periodical report date. The report shall reflect the achievements of the WP, compiling all semestral technical reports from partners during the period of review.

WPL are in charge of producing this outcome. The basis of this document will be all STR and SFR documents delivered by partners during all the period covered by the PWR. WPL shall, first, validate the contributions from partners (ensuring the work reported is indeed delivered and properly translated in terms of person-months (PM)) and, then, compile a document covering the achievements of the period, the actual status of the WP and the foreseen objectives for the next period.

Free text can be added to explain both the achievements and the objectives of the period. Regarding the WP status, a table format is introduced so as to have homogeneous contributions along all PANTERA WP. This template is covered by Table . On each row, bullet point or reduced info can be added.

Table 16. PWR WP status template.

WP status	General info about WP achievements
Work started	Work that has been initiated but not yet finalized
Work completed	Work that was finalized during the period of report
Work delayed	Task due for this period but delayed
Status of deliverables	Snapshot of deliverables (started or finished) on this period
Corrective actions	Counter measures adopted to cope with delays/problems

Periodical management reports (PMR) shall be delivered by the PC to the European Commission no later than 14 working days after the end of each quarter. The report will be composed by WP leader and partner contributions, and furthermore, the PC will set these achievements into holistic picture. The PMR contains:

- Technical progress and outcome per WP
- Project status,
 - Work started in the previous reporting period
 - Work completed in the previous reporting period
 - Status of deliverables
 - Delays and identified Risks
- The financial report will show the used PM compared to the plan, for the period and in aggregated form. Furthermore, the actual investment cost will be depicted for the period and in aggregated form.
-

Periodical Report and **Final Report** will be produced by the BIP, and will be submitted to the EC. This procedure will be explained in detail on Face to face meetings and delivered to the appropriate

administrative contacts of each of the partners, so as to make sure the process is followed smoothly each time a reporting document is needed.

5 Document Sharing, templates and tools

As part of PANTERA's outcomes, deliverables, software and platform will be delivered. Some of them include sensitive data that should be handled offline and individually by each partner, while there also exists a great number of items that should be developed in collaboration.

To provide a common repository where all people involved on PANTERA could view, add and/or collaborate, DERlab has provided an OwnCloud repository so as to be used as placeholder for all PANTERA's documents.

<https://www.derlab-repo.net>

The access credentials to the servers have been sent to each one of the PANTERA partners via separate emails.

The overall structure of the repository is shown at Table 17.

Table17. DERlab repository structure.

<ul style="list-style-type: none"> DERlab WG 4 Strengthening the Ir PANTERA <ul style="list-style-type: none"> Budget Consortium Agreement Contracts Deliverables Meetings Preparation and negotiation Project implementation Publications Reporting Templates Workshops WP1 - Project coordination and WP2 - Pan-European R&I com WP3 - The state of R&I, standa WP4 - Key topics and content i WP5 - Workshop and dedicate WP6 - Collaboration working g WP7 - Methodology and exm Settings Help Center Feedback & Support User Forum Video Guides 22 	<div>Download Download as Move to Copy Mark as Read Delete</div> <div>Meetings</div> <div>Ata Khavari Created 22/10/2018 11:57 Documents 16 Subfolders 5</div> <div>WP2 - Pan-European R&I community 4</div> <div>Ata Khavari Created 22/10/2018 12:02 Documents 4 Subfolders 1</div> <div>Templates 4</div> <div>Ata Khavari Created 22/10/2018 11:58 Documents 3 Subfolders 1</div> <div>Preparation and negotiation</div> <div>Ata Khavari Created 22/10/2018 11:55 Documents 75 Subfolders 18</div> <div>Consortium Agreement</div> <div>Christiana Panayi Created 17/12/2018 10:46 Documents 5 Subfolders 0</div> <div>Contracts</div> <div>Ata Khavari Created 22/10/2018 11:58 Documents 1 Subfolders 2</div> <div>Project implementation</div> <div>Vasilios Ellismou Created 21/10/2018 08:33 Documents 3 Subfolders 0</div> <div>WP8 - Dissemination and Communication activities</div> <div>Ata Khavari Created 22/10/2018 12:05 Documents 0 Subfolders 3</div> <div>WP7 - Methodology and exploitation management</div> <div>Ata Khavari Created 22/10/2018 12:05 Documents 0 Subfolders 0</div> <div>WP6 - Collaboration working groups</div> <div>Ata Khavari Created 22/10/2018 12:04 Documents 0 Subfolders 0</div> <div>WP5 - Workshop and dedicated stakeholders meeting organisation</div> <div>Ata Khavari Created 22/10/2018 12:04 Documents 0 Subfolders 3</div> <div>WP4 - Key topics and content management</div> <div>Ata Khavari Created 22/10/2018 12:03 Documents 0 Subfolders 0</div> <div>WP3 - The state of R&I, standardisation and regulation</div> <div>Ata Khavari Created 22/10/2018 12:02 Documents 0 Subfolders 0</div> <div>WP1 - Project coordination and management</div> <div>Ata Khavari Created 22/10/2018 12:02 Documents 0 Subfolders 0</div> <div>Deliverables</div> <div>Ata Khavari Created 22/10/2018 11:59 Documents 0 Subfolders 0</div> <div>Budget</div> <div>Ata Khavari Created 22/10/2018 11:59 Documents 0 Subfolders 0</div> <div>Publications</div> <div>Ata Khavari Created 22/10/2018 11:58 Documents 0 Subfolders 0</div> <div>Reporting</div> <div>Ata Khavari Created 22/10/2018 11:57 Documents 0 Subfolders 0</div> <div>Workshops</div> <div>Ata Khavari Created 22/10/2018 11:57 Documents 0 Subfolders 0</div> <div>List of events for potential workshops and side events.xlsx</div> <div>Melissa Setakhi Updated 22/02/2019 16:44 9.37 KB</div>
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Much documentation is envisaged to be included in the official repository. Apart from specific research and outcome data, different types of documents will be created, distributed, shared and updated by partners. These documents might have different dissemination levels, from internal for just PANTERA's members, or even just a small group of partners on a pilot, to wide audience such as the EC, other EU-funded projects, or dissemination and standardization bodies.

Among those documents, the following are of particular importance to ensure good quality progress of the project, instantaneous access to the relevant information, and its tracking:

- **Web meetings' minutes:** to be made available at the repository no further than 3 days later by the chairperson (TL, WPL, PC, STM, etc.) on the proper workspace, as well as announced to relevant contacts. From that point a period of 1 week is open to provide feedback, after which the minutes are considered as approved and the action points derived as fixed.
- **Face to Face Meeting** (WP, QCB, GA meetings...) **minutes** should be uploaded within 5 days on the pertinent workspace, announcing its availability as well to all members. From that point a period of 1 week is open to provide feedback, after which the minutes are considered as approved and the action points derived as fixed.
- Any of the meetings should be preceded by announcement and upload of an **Agenda**, produced by the chairperson at least 1 day in advance.

Following this process will guarantee the appropriate distribution and announcement of all decisions taken on meetings, while leaving room for partner reply on all cases.

In addition, some extra requirements are set so as to ensure the pertinent information availability and readiness for its dissemination to the proper audience:

- All PANTERA's documents must be written in English. This facilitates sharing them among all partners inside and outside the consortium (if needed).
- All PANTERA's documents must follow the same Word format (provided by DERlab at project start) so as to ease the production and review processes.
- All final documents must be, when approved, converted into PDF format before submission to the EC, as this is the format required to reduce its size.
-

FOSS and DERlab has provided, at project start, all needed templates for partners to deliver all relevant information used during PANTERA's lifetime, including:

- Word document template, to be used on deliverables and minute files. It includes all title, caption, figure, table reference... styles to be used and guides to enter technical contributions.
- STR, SFR and PWR templates, using the Word template as basis, and including the table and information format expected for each partner or WPL to introduce data.
- Presentation template, using Power Point, to provide a common slide format for all PANTERA partners. This will be used both for presenting results on project meetings and disseminating them on external events.

All these templates are uploaded on the project repository and available to all PANTERA partners through the following link.

<https://www.derlab-repo.net/products/files/#878>

Documents submitted to Publications, Standardization or Regulatory bodies might need to follow

specific rules and templates requested by these external organizations and, thus, will be prepared ad-hoc if needed.

As for other tools to be used by PANTERA partners, a set of mailing lists has been created and will be maintained by DERlab, so as to ensure the proper information flow between partners while isolating working groups, avoiding the information overload.

The following mailing lists have been created inside PANTERA:

- **PANTERA (all)**
 - All registered members
 - to be used for a very quick broadcast of messages
- **PANTERA financial**
 - one main representative per partner
 - This is for issues relevant for all partners from a financial point of view

6 Publications

This section is conceived as a preliminary step towards the elaboration of PANTERA WP and especially D8.1 “Dissemination, communication and cooperation plan”, on which all detailed policies will be presented.

D8.3 “PANTERA Collaboration Platform: European Hub for Smart Grids”, will explain all relevant specifications and info regarding the initial content of this platform.

As a first step, from the management perspective, the dissemination and communication procedures are regulated by the agreement made when signing the CA document (<https://www.derlab-repo.net/products/files/#1016>)

7 Discussion and Conclusions

The purpose of this D1.1 document is to help project partners, editors, task leaders and work package leaders execute the planned research in an efficient and organized manner. As technical and scientific research is the dominant project goal, quality assurance and dissemination of the results is an important aspect of PANTERA's research work as well.

The document includes, as a specific request of the EC, the detailed analysis of the work plan, including the task breakdown and analysis. Each individual task has been deeply studied so as to determine potential sub-tasks (assigning them to a particular responsible) and inter-task relationships of dependency (either receiving inputs or providing outcomes) both for tasks in the same WP and cross-WP relationships.

Special attention has been put on this report to thoroughly describe all management procedures and structures inside PANTERA. The groups of governance, their members and roles are described in detail in section **Error! Reference source not found..**

The way all outcomes of the project are going to be prepared, stored, reviewed and delivered is presented all along this document.

In addition, some items that will be described in detail later on, such as quality control and dissemination practices, are included here in an attempt to provide the overall management view of PANTERA.

The document is a living document, and may be updated with new version numbers, to reflect e.g. change of persons and responsibilities or modifying or amending the document based on recent management experiences, or for reflecting tool modifications.

8 Annex

8.1 List of Figures

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