



SKILLS
INSTRUCT
INSTRUMENTS
CONSTRUCTION

INSTRUCT PROJECT DATA MANAGEMENT PLAN



D7.3 Project data management plan

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Authors:

Agnieszka Kowalska, ASM Market Research and Analysis Centre Ltd.

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Glossary

Acronym	Full name
EC	European Commission
EE	Energy Efficiency
EU	European Union
GA	Grant Agreement
PC	Project Coordinator
WP	Work Package
ASM	ASM – Market Research and Analysis Centre
VTT	Technical Research Centre of Finland
LIST	Luxembourg Institute of Science and Technology
RIL	Finnish Association of Civil Engineers
CU	Cardiff University
R2M	Research to Market Solution France
DTTN	Distretto Tecnologico Trentino
ENEFFECT	Center for Energy Efficiency EnEffect
AB	Advisory Board
DPO	Data Protection Officer
POPD	Processing of personal data
GDPR	General Data Protection Regulation
DMP	Data management Plan
ORDP	Open Research Data Pilot
MS	Member States

Executive summary

The present report “INSTRUCT project data management plan” aims at detailing the procedures that will be implemented by the INSTRUCT project for research data collection, storage, protection, retention and destruction. It also confirms that the procedures applied will comply with national and EU legislation.

Main areas addressed by the document are primary research conducted within the duration of the project.

1. Introduction

Data Management Plan (DMPs) is a key element of good data management in every research project in H2020 and it supports subsequent data and knowledge integration and reuse. In INSTRUCT project a special task has been planned that deals with data management including elaboration of a report entitled „Project data management plan” which will detail all the ethics requirements and procedures to be followed by INSTRUCT Partners. The DMP will thus describe the data management life cycle for the data to be collected, processed and/or generated in INSTRUCT, especially with regards to the handling of research data during and after the end of the project, type of data collected, processed and/or generated, methodology and standards applied, open access data and how data will be maintained including after the end of the project¹.

The present report is directly linked to all tasks related to ethics requirements. The leader of these activities is the INSTRUCT Coordinator, ASM, who was responsible for the preparation and delivery of two reports on ethics with regards informed consent procedures and processing of personal data required by the European Commission. All these reports and the present one on data management deal with ethical and legal issues and should be treated as complementary. It should be noted that basic information on data management in INSTRUCT project has been already included in report on Personal data protection thus this report will complete all the missing information especially related to research data. The present deliverable is an Open Research Data Pilot (ORDP) report and as such INSTRUCT Partners should apart from developing a data management plan (DMP) as a deliverable, give also open, free-of-charge access to the end-user to digital research data generated during the action.²

The DMP will be updated should any significant changes appear, such as new data which gathering was not planned at the proposal stage, any changes in policies of INSTRUCT Partners or changes in consortium composition and other external factors (e.g. new Partner joining or old Partner leaving INSTRUCT project).³ The monitoring of data management plan will be done each 6 months.

¹ H2020 Programme Guidelines on FAIR Data Management in Horizon 2020, Version 3.0, 26 July 2016, https://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/hi/oa_pilot/h2020-hi-oa-data-mgt_en.pdf

² H2020 Programme AGA – Annotated Model Grant Agreement, Version 5.2, 26 June 2019 https://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/amga/h2020-amga_en.pdf#page=177

³ H2020 Programme Guidelines on FAIR Data Management in Horizon 2020, Version 3.0, 26 July 2016, https://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/hi/oa_pilot/h2020-hi-oa-data-mgt_en.pdf

2. Operating procedures for data management in INSTRUCT project

At the beginning we would like to confirm that all procedures and activities regarding data collection, storage, protection, retention and destruction within the INSTRUCT project, which is coordinated by ASM (who adapted its procedures to the requirements of the General Data Protection Regulation (GDPR) in due time) have complied and will comply with national and EU legislation. The report on Processing of personal data provided already information on the procedures for the data collection, storage and retention, protection as well as its destruction with regards the dissemination and communication activities and the assigned Data Protection Officer.

2.1. Data summary

The primary data that will be gathered in the INSTRUCT project will be part of several project activities:

- The key INSTRUCT data will be gathered in WP2 which is about eliciting requirements to increase the demand for skills in Energy Efficiency.

The goal will be to obtain information from all around Europe on opinion as well as evidences that corroborates and reinforces the correlation between (a) skills and education, and (b) energy performance and quality. This relates to the Strategic Objective no. 1 (SO1) of the INSTRUCT project which is about delivering the industry and academic above-mentioned evidence. Within this objective it is also planned to deliver skills and learning outcomes matrix which will be validated at the workshop with EU experts.

These data will be collected via:

- in-depth telephone/online interviews and online survey in Survey Monkey tool on the correlation between education and energy performance,
- questionnaire to collect training modules,
- feedback gathered during webinars and after in online format.

- Further data that will be obtained in INSTRUCT project will relate to defining and adapting a framework for the crosscutting instruments and other WP3 tasks where consultations with Stakeholders' Network will be required.

These data will be collected via:

- feedback gathered during the webinar and after in online format,
- online survey/interviews/consultations.

- Data will be also gathered on the testing of the tools presented in INSTRUCT project via the INSTRUCT demonstration pilots.

These data will be collected via feedback gathered during the demonstration activities and via online surveys / telephone interviews.

- Moreover, at the end of the project it is planned to gather data with regards exploitation possibilities relating to INSTRUCT results to accelerate the demand for EE skills in city planning, and in building and refurbishment projects.

These data will be collected via feedback gathered during the workshops/webinars and via online surveys / telephone interviews.

If any changes arise in the above presented information the DMP will be updated accordingly.

In terms of already available data we will usually start the tasks in WP2 and WP3 with desk research. In terms of activities relating to eliciting requirements to increase the demand for skills in Energy Efficiency many available resources will be scanned by all the Partners to find information from national industry or professional reports on the correlation between energy efficiency and trainings

with latest examples / success stories of where training has enabled the delivery of an energy efficient building, and how this was achieved.

Furthermore, for establishing a taxonomy of current training offers for energy efficiency in the EU there will be a desk research analysis performed of the general status-quo linked with training in MS and by reviewing reports and collecting innovative training examples. Partners will be involved in indicating national or EU reports (addressing skills, skills shortage in relation with building energy) as well as identifying the competency & skills matrix, learning outcomes frameworks (e.g. BIMEET), and the key disciplines targeted by such matrices (e.g. HVAC).

The data will come from different sources e.g. European Construction Sector Observatory, Build-up skills portal and national information, dedicated reports etc.

2.2. FAIR data

The research data generated in the project will be 'FAIR', that is findable, accessible, interoperable and re-usable. In each report in the project describing the data gathered information will be provided related to the FAIR character of the data.

With regards to the availability of the data the following content-related reports have “public” status and therefore will be widely promoted and made available:

Table 1 Public content-related deliverables

Del No	Title	Nature	Dissemination Level
D2.1	Correlation between training and energy efficiency	Report	Public
D2.2	Taxonomy of current training offers for energy efficiency in the EU	Report	Public
D2.3	Skills and Learning outcomes matrix	Report	Public
D2.4	Requirements for new instruments	Report	Public
D3.1	INSTRUCT framework of instruments	Report	Public
D3.2	INSTRUCT toolset specification and database	Report	Public
D3.3	New legislative frameworks	Report	Public
D3.4	Report on sensitization methodology towards producers and retailers	Report	Public
D3.5	Report on the expectations of building and homeowners	Report	Public
D4.1	Demonstration of Energy Skills Certification	Report	Public
D4.2	BIM training material and modules	Report	Public
D4.3	Partnerships with procedures, retailers and contractors	Report	Public
D4.4	Energy skills recognition policy making	Report	Public
D4.5	Initiatives for building and homeowners	Report	Public
D4.6	Reduction of gap between design and action energy efficiency and initiatives for building owners	Report	Public
D4.7	Engagement of key stakeholders to stimulate demand of energy skills	Report	Public
D4.8	Development of the capacity for supply of qualification services	Report	Public
D4.9	Refinement of the WP3 solutions based on pilot demonstrators' results	Report	Public
D5.3	Stakeholder activities final report	Report	Public

D5.4	Networking activities	Report	Public
D6.3	EU-level forum for competence accreditation bodies for EE skills	Websites	Public
D7.4	Report on monitoring of impacts and barriers	Report	Public

The data will be made accessible via the INSTRUCT project website, wide promotion activities planned in INSTRUCT project (e.g. via newsletter, sharing of results during events and presentations, during INSTRUCT project meetings and webinars, project videos and brochure, professional and scientific publications).

Moreover, data gathered in WP2 and WP3 will be available via the www.energy-education.com platform – the “one-stop-shop” solution to access information related to BIM, energy efficiency training, education, knowledge expertise, best practice and associated services. This database was elaborated in BIMEET project and will be furthered valorised, complemented with INSTRUCT research data, promoted and exploited. When the data is typed in the search request, rather than the results being returned as a single list they are displayed within the widgets. The platform incorporates a powerful, intelligent search engine that is designed to quickly direct the user to the most relevant resources. The intelligence behind the search engine is in continuous development, and as the project progresses the number of widgets that will display results will increase.

Finally, during the course of the project Partners will analyse different open repositories (<https://www.re3data.org/repository/r3d100010060>) where the Partners could also deposit the research data.

2.3. Allocation of resources

All scientific publications planned in INSTRUCT will be published as "open access" papers either following the "Gold" or the "Green" model. A budget for LIST, VTT and CU have been foreseen in the project to enable open access to the publications.

2.4. Data security

Research data gathered during the project will be stored on the computers that can be accessed only by authorized people. The research data generated from a specific task will be stored by the Task Leader. After having completed the research (interviews, surveys) data will be recorded and removed from computers.

Research databases will be protected with a strong password and only the INSTRUCT researchers and managers will be allowed to access databases. Responses will be coded to make the identification of companies impossible. The list associating names with codes will be stored by the Task Leader. Moreover, to assure the methodological credibility and enable a scientific verification, coded responses should be stored for a relatively long time. On the other hand, the list associating particular organisations with code numbers will be removed when research process is finalized, but no later than at the project end.

Computers, on which data will be stored, will be protected with login and password. An updated antivirus system will be installed, and a Firewall will be activated.

After longer inactivity, a screen saver will be turned on with a password required to reactivate a computer.

Additionally, when data are sent by email, it will be saved, digitalized and removed from mailboxes.



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**Evidence-based market and policy instruments implementation across the EU
to increase the demand for energy skills across construction sector value**



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