



HeriTACE

Data Management Plan - Initial

Deliverable D1.2

Version N°1

Authors: De Jonge Klaas (UGent)

Contributors: All partners

Reviewers: Marianne Van Lancker (UGent), Lieve Helsen (KUL), Filip Jorissen (Bulttwins)



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1 Disclaimer

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2 Project information

Grant Agreement	n°101138672
Project Title	Future-proofing Heritage Townhouses by Optimising Comfort and Energy in Time and Space
Project Acronym	HeriTACE
Project Coordinator	Arnold Janssens, Ghent University
Project Duration	1 January 2024 - 31 December 2027 (48 months)

3 Deliverable information

Related Work Package	WP1 Project Management
Related Task(s)	T1.3 Knowledge and data management
Lead Organisation	Ghent University (UGent)
Contributing Partner(s)	All Partners
Due Date	30/06/2024
Submission Date	26/06/2024
Dissemination level	Public

3.1 History

Date	Version	Submitted by	Reviewed by	Comments
21.06.2024	N°1	Klaas De Jonge	Marianne Lancker, Lieve Helsen, Filip Jorissen	Initial version

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5 Executive Summary

This deliverable is the initial data management plan (DMP) developed within the first 6 months of the project. An update to this document will be made twice, once during the project and once at the end.

This initial DMP outlines the general principles that will be used within the heriTACE project with regards to the public deliverables. To adhere to the FAIR data principles, all public deliverables will at least be shared on the Zenodo platform following a specific naming convention and linked to the "HorizonEU-heriTACE" community on Zenodo. Finally, this document outlines the data management responsibilities of each project partner, including general arrangements for if personal data is gathered.

5.1 Abbreviations and acronyms

Acronym	Description
DMP	Data Management Plan
R	Report
DEM	Demonstrator (pilot, prototype)
DEC	Websites, patent filings, videos, etc
PU	Public
SEN	Sensitive

6 Deliverables

The heriTACE project will generate 37 Reports, do 4 demonstrations, make a website and other dissemination material, generate 3 versions of this data-management plan (initial-update-final), models and algorithms. An overview of the deliverables is provided in Table 1 with an indication of the dissemination level, "openness", of the deliverable. In line with the FAIR principles, the majority of the deliverables are public and only exceptionally deliverables are treated as sensitive and thus not public.

Abbreviations used in the overview:

- **Types**
 - R Report, Document
 - DMP Data Management Plan
 - DEM Demonstrator, pilot, prototype
 - DEC Websites, patent filings, videos, etc
 - OTHER Other than listed above
- **Dissemination Level**
 - PU Public
 - SEN Sensitive

Table 1 - Overview of deliverables of the heriTACE project

WP	Deliverable Number	Deliverable name	Short description	Type	Diss
1	D1.1	Project Management Plan	To ensure project execution of the highest quality, a variety of standardised procedures, templates and instructions related to the management will be established and documented in the Project Management Handbook. (Task 1.)	R	PU
1	D1.2	Data Management Plan (initial)	The data Management Plan outlines how data will be collected/handled/stored according to the FAIR principles.(Task 1.3)	DMP	PU
1	D1.3	Data Management Plan (update)	The data Management Plan outlines how data will be collected/handled/stored according to the FAIR principles.(Task 1.3)	DMP	PU
1	D1.4	Data Management Plan (final)	The data Management Plan outlines how data will be collected/handled/stored	DMP	PU

WP	Deliverable Number	Deliverable name	Short description	Type	Diss
			according to the FAIR principles.(Task 1.3)		
2	D2.1	Building envelope characteristics	Report and data on the analysis of the building envelope characteristics (Task 2.1)	R	PU
2	D2.2	Energy Conservation measures inventory	Longlist and shortlist of energy conservation measures for the building envelope (Task 2.2)	R	PU
2	D2.3	ETICS solution for plastered masonry walls	Prototype of ETICS solution for plastered masonry walls - tested in lab, simulated (Task 2.3)	DEM	SEN
2	D2.4	Future-proof concept for interior retrofitting of wooden facades	Prototype of insulation solutions for wooden facades in changing Nordic climates - measured in test building, simulated (Task 2.4)	DEM	PU
2	D2.5	Improved historical window systems	Prototype of energy-efficient historical window systems - tested in lab and using new pulse test protocol (T2.5)	DEM	PU
3	D3.1	HVAC-concepts for heritage buildings	Longlist and shortlist of HVAC concepts for heritage buildings (Task 3.2.1).	R	PU
3	D3.2	Comfort and IAQ in heritage townhouses	Report and data on the analysis of IEQ and HVAC in existing heritage townhouses (Task 3.1);	R	PU
3	D3.3	Baseline BES-models	Models of the baseline scenarios validated using measurement data from case-study monitoring (Task 3.2.2)	OTHER	PU
3	D3.4	Smart ventilation strategies reducing moisture risks	Ventilation strategies specifying new control methods reducing moisture risks in wooden heritage townhouses (T3.3.1)	R	PU
3	D3.5	Performance-based ventilation and control strategies	Validated concepts and control logics, selection matrix (T3.3.2)	R	PU

WP	Deliverable Number	Deliverable name	Short description	Type	Diss
3	D3.6	Ventilative cooling guide	Decision guide for ventilative cooling potential (T3.3.3)	R	PU
3	D3.7	Smart hybrid heating concepts	Tested hybrid heating concepts, based on new sizing method (T3.4)	R	PU
3	D3.8	Performance assessment of building envelope and HVAC concepts in heritage townhouses (initial)	Quantified performance and design decision guidelines, T3.5 (version 1)	R	PU
3	D3.9	Performance assessment of building envelope and HVAC concepts in heritage townhouses (final)	Quantified performance and design decision guidelines, T3.5 (final version)	R	PU
4	D4.1	R ² ES-based energy supply concepts for heritage buildings in historical neighbourhoods	Longlist and shortlist of R ² ES based energy supply concepts incl. heritage constraints logbook (T4.1 and T4.2)	R	PU
4	D4.2	Prototype BIPV integrated in roof tiles	Product description and testing results of the prototype BIPV (T4.3.1)	DEM	SEN
4	D4.3	Feasibility of heat recovery from unharvested local sources in heritage environments	Report of the feasibility study on heat recovery from unharvested local sources (T4.3.2)	R	PU
4	D4.4	MPC Calibration method	Report on the MPC calibration method, incl. calibrated parameters (T4.3.3)	R	PU
4	D4.5	MPC demonstration in historic building	Results on the demonstration of MPC in historic building, including logbook of faults (T4.3.3, T4.3.4)	R	PU
4	D4.6	Building block MPC extensions	Report on the virtual MPC development and simulation-based demonstration for a	R	PU

WP	Deliverable Number	Deliverable name	Short description	Type	Diss
			historical building block (Task 4.3.5)		
4	D4.7	Performance assessment of R ² ES concepts in heritage townhouses in historical neighbourhoods (initial)	Quantified performance, sizes and gains (T4.4 and T4.5, first version)	R	PU
4	D4.8	Performance assessment of R ² ES concepts in heritage townhouses in historical neighbourhoods (final)	Quantified performance, sizes and gains, and design recommendations (T4.4 and T4.5, final version)	R	PU
5	D5.1	Case-study selection at building and neighbourhood levels	Representative selection of case-study historical townhouses and neighbourhoods (T5.0)	R	PU
5	D5.2	Cultural heritage analysis and value assessment	Compilation of cultural heritage values based on the cultural heritage analysis; (T5.1.1)	R	PU
5	D5.3	Cultural heritage building user and owner perspectives	Qualitative and quantitative empirical findings from interviews and survey (T5.1.2)	R	PU
5	D5.4	Baseline scenarios	Definition and characteristics of the Pre-renovation and renovation baseline scenarios (T5.2)	R	PU
5	D5.5	Map of KPI	Definition of KPI, metrics and assessment methods (T5.2)	R	PU
5	D5.6	Visualisation model to assess the visual impact of energy retrofitting solutions on the building heritage value	Algorithm of the visualisation model, including documentation and application example (T5.3.1)	OTHER	PU

WP	Deliverable Number	Deliverable name	Short description	Type	Diss
5	D5.7	Multidimensional model for the holistic and multi-scale assessment of heritage buildings	Report of the model and the description, (Task 5.3)	R	PU
5	D5.8	Validation of the holistic and multi-scale assessment model	Population and validation of the holistic and multi-scale assessment model on 3 case-studies (T5.4)	R	PU
6	D6.1	Transdisciplinary processes for the holistic future-proofing of heritage buildings in neighbourhoods	Scripts for the standardized transdisciplinary processes and recommendations for the improvements of standards (T6.1)	R	PU
6	D6.2	Policy advice report	Local policy Advise reports, including vision and plans for future-proofing of the local case-studies (T6.1)	R	PU
6	D6.3	Customer services for early-stage design of neighbourhood energy systems	Description of the customer services and the test of the customer process (T6.1.1)	R	PU
6	D6.4	Integrated and balanced design guidelines for heritage townhouses	Tools and guidelines (T6.2)	R	PU
6	D6.5	Early design tools for the feasibility assessment of innovative HVAC and energy solutions	Technical system design tools (T6.2.1)	R	PU
6	D6.6	Technical guidelines for building the building envelope solutions	Technical documentation for building professionals (T6.2.2)	R	PU

WP	Deliverable Number	Deliverable name	Short description	Type	Diss
6	D6.7	Exploitation plan (initial version)	Exploitation strategies (T6.3)	R	SEN
6	D6.8	Exploitation plan (final version)	Exploitation strategies (T6.3)	R	SEN
7	D7.1	Communication and Dissemination plan (version 1)	Integrated Plan for communication and dissemination that will determine actions and define responsibilities and timelines to communicate and disseminate widely the results of the work carried out (Task 7.1)	R	PU
7	D7.2	HeriTACE Visual Identity	Project Visual identity (T7.2)	OTHER	PU
7	D7.3	Website and social media	Project website and community building via social networks (T7.3)	DEC	PU
7	D7.4	Communication and Dissemination plan (version 2)	Communication & dissemination strategies (T7.1)	R	PU
7	D7.5	Communication and Dissemination plan (version 3)	Communication & dissemination strategies (T7.1)	R	PU
7	D7.6	Online and offline dissemination material (version 1)	Leaflet, poster, video etc. (T7.4)	DEC	PU
7	D7.7	Communication and Dissemination plan (final version)	Communication & dissemination strategies (T7.1)	R	PU
7	D7.8	Online and offline dissemination material (version 2)	Leaflet, poster, video etc. (T7.4)	DEC	PU
7	D7.9	Guidelines for designers and architects	Technical brochures (T7.5)	R	PU

7 FAIR data

The 'FAIR' principles: Findable, Accessible, Interoperable and Re-usable are applied for all final public research datasets in this project. The open-access repository Zenodo (www.zenodo.org) will be used to acquire this goal. The Zenodo repository is developed following the best practice FAIR principles. The general implementation of the FAIR principles can be visited on: <https://about.zenodo.org/principles/>.

Using Zenodo, all public research datasets will be attributed a persistent identifier, namely a Digital Object Identifier (DOI) if they have not been appointed a DOI elsewhere.

The following procedure will be used in this project for the final public research deliverables:

Files	Upload the final version of the files in Zenodo
Communities	Specify the community "HorizonEU-heriTACE" https://zenodo.org/communities/heritace/
Upload Type	Select the correct upload type. For complete project deliverables, choose "Publications" > "Project deliverable"
Digital Object Identifier	Include the doi of the dataset, or ask Zenodo to register a doi for your dataset.
Title	<p><i>For deliverables:</i> "DX.X Title of the deliverable (DX.X_Type)"</p> <p><i>For datasets:</i> "Title of the dataset (DX.X_dataset##)"</p> <p><i>For models:</i> "Title of the model (DX.X_model##)"</p> <p><i>For Algorithms:</i> "Title of the algorithm (DX.X_algorithm##)"</p> <p><i>For video/audio/image/poster/presentation etc.:</i> "Title of media (DX.X_media##)"</p> <p>X.X is the deliverable number ## is a sequential number (starting at 01) Type is the abbreviation for the type of deliverable as listed in Section 6 of this document. For the 'OTHER' types, a short description is used (e.g. 'Model')</p>
Publication Date	<i>Fill in the date of first publication.</i>
Creators	Add the authors.
Description	<p>The description (abstract) shall describe the content of the dataset in layman's terms, including the type of data points and their general application. The abstract shall be between 250 and 500 characters long (including spaces).</p> <p>The description ends with the following paragraph: "This project has received funding from the European Union's Horizon Europe research and innovation programme (project: 101138672), call HORIZON-CL5-2023-D4-01"</p>

Licenses	<p>All PU datasets:</p> <p>Select an open-access license that allows the deliverable to be read by all without geographic limitations. Further restrictions can be given in agreement with the partners involved in the deliverable. All partners are encouraged to share with limited restrictions. At the least, derivations and sharing alike should be permitted for non-commercial use.</p> <p>An example of such a license is the CC-BY-NC-SA license. To use this license: Press the "Add custom" button. Fill in the following:</p> <ul style="list-style-type: none"> • Title: CC BY-NC-SA 4.0 Creative Commons Attribution-Noncommercial-Sharealike 4.0 International • Description: Attribution – You must give appropriate credit , provide a link to the license, and indicate if changes were made . You may do so in any reasonable manner, but not in any way that suggests the licensor endorses you or your use. NonCommercial – You may not use the material for commercial purposes . ShareAlike – If you remix, transform, or build upon the material, you must distribute your contributions under the same license as the original. No additional restrictions – You may not apply legal terms or technological measures that legally restrict others from doing anything the license permits. <p>https://creativecommons.org/licenses/by-nc-sa/4.0/</p> <ul style="list-style-type: none"> • Link: https://creativecommons.org/licenses/by-nc-sa/4.0/legalcode.en <p>An example of a license that allows re-use more freely is the CC-BY license. To use this license: Press "Add standard" and select "Creative Commons Attribution 4.0 International"</p> <p>All SEN datasets: optional</p>
Contributors	Here you can add contributors that are not authors of the dataset.
Keywords	<p>Include at least following keywords: "heriTACE", "Horizon" "EU"</p> <p>It is recommended to add more keywords to the upload's visibility.</p>
Languages	Add the languages. This should be English.

Publisher	Add the name of the publisher if this is different from Zenodo.
Funding: Awards	Select "European Commission" and grant number "101138672" or search for "heriTACE" (the system automatically identifies the heriTACE project)
Alternate identifiers	Add other identifiers if the deliverable would have one.
Related works	Here you can link the dataset to related publications or datasets. For datasets please do link the dataset to the deliverable (upload the deliverable as a separate upload in the system). Partners are free to link the dataset to other identifiers as well (e.g. publications, other datasets or materials).
Visibility	All PU datasets: "Public" All SEN datasets: "Restricted", optionally with an embargo period
All other fields	Optional

8 Responsibility

Each project partner bears the responsibility to ensure the correct management and security of the datasets they generate and to ensure compliance with the grant agreement, privacy legislation, GDPR and/or other legislation. If several partners are involved in generating a deliverable, the final responsibility will fall upon the lead beneficiary of the deliverable to manage the overall datasets, unless otherwise agreed upon among the partners involved. Table 2 lists the project deliverables and the responsible partner.

In its capacity of project lead, Ghent University will support the project partners where possible on request.

Table 2 - Responsible partner for each heriTACE deliverable

Deliverable	Responsible partner
D1.1 Project Management Plan	UGent
D1.2 Data Management Plan (initial)	UGent
D1.3 Data Management Plan (update)	UGent
D1.4 Data Management Plan (final)	UGent
D2.1 Building envelope characteristics	TALTECH
D2.2 Energy Conservation measures inventory	TALTECH
D2.3 ETICS solution for plastered masonry walls	TALTECH
D2.4 Future-proof concept for interior retrofitting of wooden facades	SINTEF
D2.5 Improved historical window systems	UGent
D3.1 HVAC-concepts for heritage buildings	ZH
D3.2 Comfort and IAQ in heritage townhouses	ZH
D3.3 Baseline BES-models	UGent
D3.4 Smart ventilation strategies reducing moisture risks	SINTEF
D3.5 Performance-based ventilation and control strategies	UGent
D3.6 Ventilative cooling guide	EURAC
D3.7 Smart hybrid heating concepts	UGent
D3.8 Performance assessment of building envelope and HVAC concepts in heritage townhouses (initial)	UGent
D3.9 Performance assessment of building envelope and HVAC concepts in heritage townhouses (final)	UGent

Deliverable	Responsible partner
D4.1 R ² ES-based energy supply concepts for heritage buildings in historical neighbourhoods	SWECO FI
D4.2 Prototype BIPV integrated in roof tiles	ZH
D4.3 Feasibility of heat recovery from unharvested local sources in heritage environments	SWECO BE
D4.4 GPU-based MPC solver	Builtwins
D4.5 MPC demonstration in historic building	Builtwins
D4.6 Building block MPC extensions	KU Leuven
D4.7 Performance assessment of R ² ES concepts in heritage townhouses in historical neighbourhoods (initial	KU Leuven
D4.8 Performance assessment of R ² ES concepts in heritage townhouses in historical neighbourhoods (final)	KU Leuven
D5.1 Case-study selection at building and neighbourhood levels	UGent
D5.2 Cultural heritage analysis and value assessment	NIKU
D5.3 Cultural heritage building user and owner perspectives	NIKU
D5.4 Baseline scenarios	UGent
D5.5 Map of KPI	SINTEF
D5.6 Visualisation model to assess the visual impact of energy retrofiting solutions on the building heritage value	SINTEF
D5.7 Multidimensional model for the holistic and multi-scale assessment of heritage buildings	SINTEF
D5.8 Validation of the holistic and multi-scale assessment model	UGent
D6.1 Transdisciplinary processes for the holistic future-proofing of heritage buildings in neighbourhoods	POLIMI
D6.2 Policy advice report	POLIMI
D6.3 Customer services for early-stage design of neighbourhood energy systems	SWECO FI
D6.4 Integrated and balanced design guidelines for heritage townhouses	UGent
D6.5 Early design tools for the feasibility assessment of innovative HVAC and energy solutions	SWECO BE
D6.6 Technical guidelines for building the building envelope solutions	TALTECH
D6.7 Exploitation plan (initial version)	LGI

Deliverable	Responsible partner
D6.8 Exploitation plan (final version)	LGI
D7.1 Communication and Dissemination plan (version 1)	ACE
D7.2 HeriTACE Visual Identity	LGI
D7.3 Website and social media	LGI
D7.4 Communication and Dissemination plan (version 2)	ACE
D7.5 Communication and Dissemination plan (version 3)	ACE
D7.6 Online and offline dissemination material (version 1)	ACE
D7.7 Communication and Dissemination plan (final version)	ACE
D7.8 Online and offline dissemination material (version 2)	ACE
D7.9 Guidelines for designers and architects	ACE

9 Personal Data

Researchers will continuously monitor their activities with regards to compliance with all relevant privacy legislations, especially when data is gathered based on questionnaires or personal interviews.

If personal data is collected, an informed consent will be agreed upon between the partner(s) collecting the data and the subject.

The general principle proposed to be used by the partners of the heriTACE project when drafting the informed consent forms is that personal data is safely and securely stored by the partner that collects the data. As such, access to personal data is limited to a minimum. Data-sharing within the heriTACE project is only done after carefully filtering out the personal data or anonymizing/pseudonymising the dataset. Figure 1 illustrates the approach.

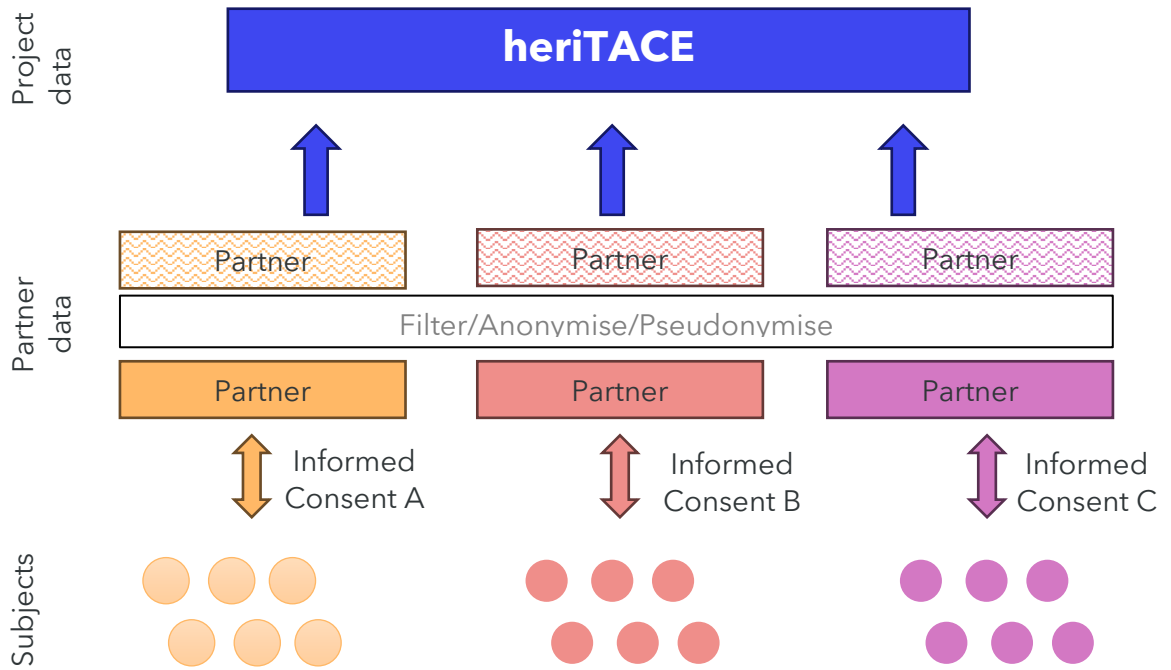


Figure 1 - General principle of personal data collection provisions