

# Modernization plan for the Public Administrations

Final Project Report

**Technical Support Instrument**

*Supporting reforms in 27 Member States*



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## ACRONYMS

Acronym	Description
SGAD	General Secretariat of Digital Administration
SEDIA	State Secretariat for Digitalization and Artificial Intelligence
Ceo	Chief Executive Officer
CVs	Resume
CD	Steering Committee
Ce	European Commission
EU	European Union
HR	Human resources
Tic	Information and Communication Technologies
Ine	National Institute of Statistics
IT	Information Technology
AI	Artificial intelligence
Je	Junior Expert
GCO	Operational Coordination Group
Gto	Operational Working Group
Dp	Project Manager
PDAP	Public Administration Digitalization Plan
DC	Quality Director
CD	Steering Committee
Herself	Senior Expert
SRSS	Structural Reform Support Service
Ct	Consortium
Tl	Team Leader
Ist	Technical Support Instrument
Gtt	Technical Working Group
Ru	United Kingdom
USA	United States of America
Gt	Working Group
DG REFORM	Directorate-General for Structural Reform Support
Bi	Business Intelligence
PRTR	Recovery, Transformation and Resilience Plan
DGCONNECT	DG Communication Networks, Content and Technology
DG DIGIT	DG Informatics
DGRTD	DG Research and Innovation
DGGROW	DG Internal Market, Industry and SMEs
.CSR	Country-specific recommendations
BPMN	Business Process Model and Notation
Poc	Proof of Concept
Piu	Single Information Point
OECD	Organization for Economic Cooperation and Development
Bi	Business Intelligence

## 1 About the Project

### Summary

<b>Project Title</b>	<i>ICT Strategy of the State Administration and Modernization plan for the Public Administrations</i>
<b>Country</b>	Spain
<b>Overall Objective</b>	Define and establish a governance model revised for the implementation of the PDAP ( <i>plan de digitalización de administraciones públicas</i> ); a holistic management model designed for each axis of the Plan; a scorecard with KPI's implemented both for each line and for the whole Plan; a change management process implemented at the level of the strategy; and a communication plan regarding the implementation of the activities of the project.
<b>Expected Results</b>	<p>The specific outcomes and respective impacts are the following:</p> <ul style="list-style-type: none"> <li>◆ <b>Outcome 1 (Direct Result):</b> provision of a comprehensive overview of the current governance model, systems and databases and current needs of the stakeholders (various services/departments/ministries) as regards data collection within the project scope</li> <li>◆ <b>Outcome 2 (Indirect Result):</b> an internal analysis of the framework of the current governance, identifying current processes, strategies and other mechanisms.</li> <li>◆ <b>Outcome 3 (Indirect Result):</b> to define the TO BE model of governance to be implemented for the SGAD, the implementation plan as well as the communication plan.</li> </ul>
<b>Project Main Deliverables</b>	<p>The project is composed by the following deliverables:</p> <ol style="list-style-type: none"> <li>1. <b>Inception report</b></li> <li>2. <b>Analysis of the current situation</b></li> <li>3. <b>As-is Business process model</b></li> <li>4. <b>Digital transformation benchmarking report</b></li> <li>5. <b>Business requirements catalogue</b></li> <li>6. <b>Communication Plan</b></li> <li>7. <b>Business Case</b></li> <li>8. <b>Communication material on business case</b></li> <li>9. <b>TO-BE situation analysis</b></li> <li>10. <b>TO-BE business process model</b></li> <li>11. <b>Steering and monitoring mechanisms PoC</b></li> <li>12. <b>Communication Plan and materials</b></li> <li>13. <b>Final project report</b></li> <li>14. <b>Communication materials</b></li> </ol>
<b>Project start and end date</b>	September 2021 - October 2022

## Framework

Summary of Phases, Deliverables, Timeline and Tasks		
Phase	Deliverable (D)	Tasks (T)
Phase 1: Project Inception	D1: 1. Inception report	T1.1: Kick-off meeting with the OWG T1.2: Introduction meetings with the stakeholders of the project T1.3: Draft the inception report (Present document)
Phase 2: Analysis of the current situation	D2: Analysis of the current situation D3: As-is Business process model D4: Digital transformation benchmarking report D5: Business requirements catalogue D6: Communication Plan	T2.1: Elaboration of the current situation analysis T2.2: As-is Business Process T2.3: Benchmarking of digital transformation strategies T2.4: Business requirements catalogue (TO-BE) T2.5: WS to discuss the draft deliverables T2.6: Communication materials on current situation
Phase 3: Elaboration of a business case	D7: Business Case D8: Communication material on business case	T3.1: Define alternative scenarios T3.2: Identify the information needed to produce the business case T3.3: Cost-benefit analysis T3.4: Decision process to choose the preferred solutions T3.5: Produce communication materials
Phase 4: Definition of the TO-BE situation	D9: TO-BE situation analysis D10: TO-BE business process model D11: Steering and monitoring mechanisms PoC D12: Communication Plan and materials	T4.1: Assist SGAD T4.2: Co-design the To-Be T4.3: To-be situation analysis and action plans T4.4: Develop a PoC T4.5: Update the PoC T4.6: Communication Plan for the To-Be T4.7: Communication materials for the To-Be
Phase 5: Project Closing	D13: Final project report D14: Communication materials	T5.1: Design communication material T5.2: Final project meetings to showcase the results of the project T5.3: Final project meetings to showcase the results of the project

## 2 Work Plan & Allocation of Resources

Work plan	Working days (n)												% Phase	Months (M)													
	PROJECT COORDINATOR	PM	SE 1 (Government and strategy model)	SE 2 (Management and processes model)	SE 3 (KPIs and Dashboard)	SE 4	SE 1 CROSS (Change management)	SE 2 CROSS (Legal)	JE 1 (Axis 1&2)	JE 2 (Axis 3)	Total	M1		M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12	M13	M14	
<b>Phase 1</b>	<b>Project inception.</b>	2	6	3	0	0	0	0	0	3	3	17	3%														
Task 1.1	Organize a kick - off meeting	1	2	1						1	1	6															
Task 1.2	Organize and carry out introduction meetings with the stakeholders of the project	1	2	1						1	1	6															
Task 1.3	Produce an inception report	2	2	1						1	1	5		D1★													
<b>Phase 2</b>	<b>Analysis of the current situation</b>	10	28	27	21	12	8	8	10	37	37	198	34%														
Task 2.1	Elaboration of the current situation analysis	3	12	12	7	6	3	4	8	21	21	97			D2★												
Task 2.2	AS-IS Business process model	2	4	3	6	1	2			3	3	24			D3★												
Task 2.3	Benchmarking of digital transformation strategies implementation in other countries	2	3	3	2	1	1	1	1	3	3	20			D4★												
Task 2.4	Business requirements catalogue	1	3	3	4	2			1	3	3	20			D5★												
Task 2.5	Workshops to discuss the draft deliverables	1	4	3	1	1	2	2		4	4	22															
Task 2.6	Communication materials on current situation analysis and project next steps	1	2	3	1	1		1		3	3	15				D6★											
<b>Phase 3</b>	<b>Elaboration of a business case</b>	3	12	16	8	4	4	4	3	31	31	116	20%														
Task 3.1	Define alternative scenarios		3	5	2	2	1		1	7	7	28															
Task 3.2	Identify the extra information needed to produce the business case	1	3	2	2	2	1		1	7	7	26															
Task 3.3	Carry out a cost-benefit analysis of each of the alternatives	1	2	3	1		1			2	2	12						D7★									
Task 3.4	Support the decision process to choose the preferred solutions	1	2	3	2		1		1	8	8	26															
Task 3.5	Produce communication materials		2	3	1			4		7	7	24						D8★									
<b>Phase 4</b>	<b>Definition of the TO-BE situation</b>	5	22	20	13	9	6	7	4	34	34	154	27%														
Task 4.1	Assist SGAD to assess its legal, operational, organisational and technical implications	2	4	4	2	2	2	1	2	5	5	29															
Task 4.2	Co-design the To-Be situation and business process model with SGAD.	2	6	5	5	2	1	1		10	10	42															
Task 4.3	Draft the To-be situation analysis and action plans		3	3	2	2	2	1	2	4	5	24															
Task 4.4	Develop a PoC	1	4	2	2	2	1	1		5	5	23															
Task 4.5	Update the PoC		2	3	2	1				4	4	16															
Task 4.6	Produce a first version of the communication plan.		1	1				2		3	2	9															
Task 4.7	Communication materials for the To-Be model		2	2				1		3	3	11															
<b>Phase 5</b>	<b>Project end and communication plan</b>	4	12	11	2	2	4	14	0	22	22	93	16%														
Task 5.1	Design communication material	2	8	6	1	1	3	8		14	14	57															
Task 5.2	Organise the final project meetings to showcase the results of the project	1	2	2				6		4	4	19														D14★	
Task 5.3	Draft the final project report	1	2	3	1	1	1			4	4	17													D13★		
<b>Working Days</b>		24	80	77	44	27	22	33	17	127	127	578	100%	M1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12	M13	M14

★ Deliverables



### 3 Phase 5: Project Closure and Communication Plan

#### Purpose and structure of the report

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The **ultimate purpose** of this report is to present a project closure document that conveys key messages and project outcomes to key stakeholders.

Specifically, it has the following specific purposes:

- Accept all deliverables and finalize the project.
- Record the lessons learned and compile them into a single document with all with all deliverables developed within the scope of the project.
- Identify lessons learned within the project execution that are related to project management and that can be applied/avoided in similar contexts.

The following activities have been carried out for the execution of this last phase:

##### *T.5.1 Design of communication material*

- Elaboration of a presentation of the project in Power Point format to be shared with the different members of the EU, to present the state of the art and the main results obtained.
- Preparation of an infographic presenting the project in a summarized form with the most salient aspects.

##### *T.5.2 Organize final project meetings to show the results of the project.*

- Organization of a final meeting with the SGAD and relevant stakeholders to present the conclusions and results of the project.

##### *T.5.3. Writing the final project report*

- Preparation of this Word document summarizing the results of the project (in English and Spanish) following the DG REFORM template.
- Deliver the final report of the D13 SGAD project

The present report **is structured** as follows:

- The final project report (D13) will include:
  - i) Results and key lessons for each deliverable, in which a brief summary of each deliverable, the results obtained from the work done and main challenges and lessons learned will be presented;
  - ii) Main findings and elements that could be replicated;
  - iii) Post-project recommendations;
  - iv) Annex of final deliverables.

## 4 Results and key lessons from each deliverable

### Deliverable 1. Initial report

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#### Brief description of the deliverable and tasks performed:

The project inception report (D1) was prepared, including the **current context** of the project and the agreed **approach** and **methodology**.

In inception report presented the **work plan** and the timeline with milestones, **roadmap** with deliverables and tasks; a description of all **deliverables**, **methodological approaches**, **working groups**, other stakeholders and techniques applied; the **project governance model**, including a description of the mechanisms and the roles and responsibilities of each stakeholder; as well as a **summary** of meetings held during the inception phase; the list of **relevant data**, documents and other information reviewed during the inception phase; the **risk management organization** chart or the **communication, coordination and validation mechanisms** between the beneficiary, DG Reform, and the Consortium.

The inception phase allowed the project team to **learn about the needs of the SGAD**, for which the following was done:

- An initial meeting was organized with key stakeholders.
- The project methodology proposed by the team was presented. In addition, the project team was able to learn more understand the results and expectations of SGAD.

#### Main challenges and lessons learned:

A) During the inception phase, the following **challenges** emerged:

- A governance model had to be implemented in accordance with the Public Administration Digitalization Plan.
- The regulatory framework that directly impacted the monitoring and reporting processes of the PDAP projects was in a process of change due to the scenario posed after the Covid-19 health crisis and the recovery mechanisms activated from the EU (Recovery and Resilience Mechanism and its translation into the Recovery, Transformation and Resilience Plan in Spain), which had to be implemented.
- There were multiple tools used by the SGAD PMO that needed to be organized and integrated.
- Communication and coordination difficulties between the agents involved in the management and implementation of PDAP projects were recognized.

B) As **lessons** learned, the following stand out:

- Compile in a single document, all the starting information to begin the project implementation.
- Framing the project in its corresponding context and arrange the approach and the methodology.

### Deliverable 2: Current situation Analysis

---

#### Brief description of the deliverable and tasks performed:

An **AS-IS** report was prepared to analyze the current **situation** of the **model established in the PDAP**, based on the **six dimensions of analysis** defined at the beginning of the project: Strategy and regulation, processes and management, organization and people, relationship with stakeholders, information systems and tools and economic and financial management.

Through these areas, the starting situation of the SGAD was addressed. In addition, given the context in which the **Digital Spain 2025 Plan**, the **PDAP** and the **PRTR** share regulatory areas, in this document same areas (studied of the PDAP) were identified and compared between them.

In short, all the information necessary to characterize the **starting situation of the project** was collected and analyzed, using information gathering techniques such as research and documentary analysis, and meetings were organized to gather the most relevant information.

#### Main challenges and lessons learned:

- A) The main **challenges** identified were: the need to **adapt the nomenclature** used by each of the regulatory frameworks identified (Digital Spain Plan 2025, PDAP and PRTR), to **align all the information** requested and used by stakeholders, to integrate the different types of reports required during the execution of PDAP-PRTR projects and the need to define indicators and monitoring KPIs.

The most important lessons learned derive mainly from having studied in depth the starting situation of the SGAD and being able to focus the project addressing the most critical needs.

### Deliverable 3: AS-IS Business Process Model

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#### Brief description of the deliverable and tasks performed:

A modeling of the existing processes at that time was developed to **analyze the current situation of the model established in the PDAP** and to be able to **define the TO-BE processes**. To this end, meetings were held with the SGAD team in which they indicated the processes they were following for PDAP management. The following issues were addressed:

- Identify current flows.
- Understand the position of agents and how tools support the process.
- Document the processes in detail so that the study can support the TO-BE analysis.

Finally, the **AS-IS Business Process Model (D3)** contained a **process map** in BPMN format, specifying between Axis 1 and Axis 2:

- For Axis 1, the proactive demand management process, the reactive demand management process and the project monitoring process were collected.
- For Axis 2, the project evaluation process and the project monitoring process.

#### Main challenges and lessons:

- A) **The main challenges** were identified as the definition of processes with stakeholders, as many of the processes were not defined and the availability of agenda to carry out the work.
- B) **The lessons learned**, process modeling was essential to find the points of improvement, during the interviews the To-Be items were identified while analyzing the initial situation.

### Deliverable 4: Digital Transformation Benchmarking Report

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#### Brief description of the deliverable and tasks performed:

A **comparative evaluation** of the implementation of **digital transformation strategies in other countries** was provided in order to have a reference framework of alternatives and good practices carried out in our environment. Specifically, a number of countries with **pre-existing digitalization strategies were selected** to analyze their governance model, based on **five main levers**:

- **Global Digitalization Plan:** as in the Spanish case, the PDAP is integrated in Plan Spain 2025, it is intended that the country under study has a Digitalization plan that frames the **Digitization Plan for Public Administrations** or Digital Services.
- **Digitalization Plan for Public Administrations or Digital Public Services:** The country under study should have a plan focused on the digitalization of its public services.
- **Decentralized Country:** countries should have a decentralized system that could be extrapolated to the Spanish one.

- **Levels of Digitalization:** it is important that the countries to be analyzed for the Best Practices are a reference of a digitalized country, for which the DESI index in digital services (measured by the EU) and the UN e-Government index have been taken as a source.
- **Recovery and Resilience Plan:** It has been taken into account that this plan for digitization of Public Administrations has been included in the PRR (in the cases of EU countries), which provides greater comparability with the case of Spain, denoting, also, that one of the priorities of the country is the digitization of the Administrations.

The benchmark presented a **holistic view of best practices** at a global level. The countries chosen were: **Germany, Australia, Denmark, Finland, Netherlands, Ireland, Sweden, France, Estonia and the United Kingdom.**

#### Main challenges and lessons learned:

- A) Among the **challenges**, were the difficulties in accessing information on certain strategies, the complex map of actors involved, the availability of public information on the plans and especially on their governance, and the limited contacts that could be established with representatives of the countries chosen for the analysis.
- B) As **lessons learned**, complement the analysis of the SGAD situation, both AS-IS and TO-BE, from a broader perspective and enrich the project implementation proposals with Best Practices and applicable success stories. Use the DGReform contacts to carry out the connection with the countries.

### Deliverable 5: Business Requirements Catalog

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#### Brief description of the deliverable and tasks performed:

For each of the areas of the framework defined above, **the business requirements** were identified as the basis for establishing the TO-BE model. In this sense, according to the framework of key dimensions (Strategy and regulations, processes and management, organization and people, economic-financial management, tools and information systems and stakeholder relations), a list of **possible requirements** was drawn up with respect to **regulatory or strategic developments**, the **support tools** needed for the processes, the requirements in terms of the **processes modeled**, etc. The results were validated in order to adapt the requirements to the stakeholders.

Following these dimensions of analysis, **global** requirements, and requirements for each of the **three Axes of the PDAP**, were detailed, in order to deal with all areas and all levels for the design of the TO-BE model. After this work, the **most critical needs** on which the proposal of this TO-BE governance model of the PDAP should focus were revealed.

#### Main challenges and lessons learned:

- A) **The main challenges** that arose during the execution of this phase were essentially due to the difficulty of establishing more fluid and frequent communication relations with all the stakeholders. e agents. This made it difficult to gather first-hand information from all the agents involved on the business requirements most in demand, as well as on their immediate validation.
- B) As **lessons learned and solutions** adopted to solve this situation, the following are pointed out:
  - o Take advantage of the synergies of the realization of other deliverables performed in parallel (such as the first versions of the PoC).
  - o Consider other work techniques to collect information and carry out the deliverable in a collaborative way.

## Deliverable 6: Communication Plan

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### Brief description of the deliverable and tasks performed:

A **Communication Plan** was prepared, identifying possible actions to be developed in each phase. The Plan specified objectives and needs, main elements (senders -of internal and external actions, audience -stakeholders, citizens, others-, roles of each of actor in the Communication Plan, messages -the evolution of the project or the dissemination of results- and channels), specific communication actions and their planning. In addition, it proposed to address communication actions for both to the AS-IS and to the TO-BE.

The Communication Plan was initially focused to guide the actions defined for the phase of current situation analysis. Specifically, it was foreseen that communication actions would be through the collaboration channels with stakeholders, in which the documentation generated would be available, as well as an infographic summarizing the current situation, the results of the benchmark and the defined business requirements.

However, the Communication Plan agreed with the SGAD was finally **designed for both: AS-IS situation and TO-BE** situation. The communication materials, which will be developed in the corresponding section, were:

- **Audiovisual material** for communication of results.
- **Presentation of the global analysis** in Power Point.
- **Presentation of results**, in PowerPoint, with detailed information on project results.
- Finally, **communicative actions were prepared for the training** of different Ministries involved in the processes.

### Main challenges and lessons learned:

- A) The main **challenges** faced by the project team were: contextual and regulatory changes derived from the application of the PRTR framework; the emergence of new communication needs; and the agreement on specific communication actions for the TO-BE situation after the definition of the processes (demand management, project management and portfolio management).
- B) As **lessons learned** from the evolution of this deliverable, the capacity to adapt the project to the most critical needs and the importance of coordinating efforts to generate valuable work.

## Deliverable 7: Business Case

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### Brief description of the deliverable and tasks performed:

The **Business Case** was proposed, agreed with the SGAD, as a comparative analysis between the starting point of and the situation resulting from applying the proposed TO BE model, in order to expose the potential benefits and propose possible results. To this end, the main problems detected in the AS-IS (through the above-mentioned dimensions of analysis) were compiled and the solutions were presented, taking into account the effort to implement them and the resulting benefit.

- To carry out this **comparative study**, the six dimensions of analysis (that have articulated the project since its inception) were taken into account: strategy and regulations, processes and management, organization and people, economic-financial management, information tools and systems, and stakeholder relations. In each of these areas, initial problems were identified and proposals for improvement were made. Finally, proposals that were successfully implemented during the execution of the project were collected (such as the survey of processes or the operational planning of projects and subprojects included in the dashboard in Power BI). Furthermore, those pending to be started were indicated and, among them, some whose priority could be modified depending on the impact caused and the effort required.

### Main challenges and lessons learned:

- A) During the implementation of this activity, the project team encountered **difficulties** from the need to prioritize other activities according to the needs of the SGAD and to adapt this cost-benefit analysis to the

reality of the circumstances (PRTR as the new predominant regulatory framework). To this end, in consensus with the SGAD, it was agreed that this phase, its activities and corresponding deliverables (D7 and D8), would be delivered after Phase 4, and would be oriented to the identification of the benefits and risks of implementing the defined the TO-BE situation.

- B) As **lessons learned**, the capacity to combine activities and take advantage of synergies that arise during their execution to enrich, at a global level, the entire project. In addition, to adapt the activities to the evolution of the project for ensuring their adaptation and usefulness.

## Deliverable 8: Business Case Communication Materials

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### Brief description of the deliverable and tasks performed:

Following the preparation of the Business Case document, a **results presentation** was made in Power Point, including detailed information of project outcomes and a relationship between the starting defined objectives and the solutions obtained during its development.

Specifically, a tour of the **overall execution** was delivered, presenting firstly the initial challenges of the governance model, secondly, a summary of the **methodology** used to achieve results (interrelation between the main obstacles found in the AS-IS) and, finally, the **solutions agreed** upon in the TO-BE with the expected impacts, according to the effort, and expected benefits.

The relationship between problems, solutions and results was made for each dimensions of analysis: strategy and regulation, processes and management, organization and people, relationship with stakeholders, information systems and tools, and economic and financial management; finally, the proposals designed and successfully implemented during the execution of the project were presented.

### Main challenges and lessons learned:

- A) As difficulties, there were **no significant challenges**, since the communication actions agreed with the SGAD were prepared and the results of the Business Case, also validated and transferred.
- B) As **lessons learned**, once again, **project adaptation capacity** to the critical needs and requirements of the SGAD.

## Deliverable 9: Analysis of the TO-BE situation

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With the delivery of the D9 began Phase 4 of the project: *Definition of the TO-BE situation*.

### Brief description of the deliverable and tasks performed:

The objective of this deliverable was to carry out an analysis of the **TO-BE situation** and the action plans for the future, developing a proposal for a governance and management model for the Public Administrations Digitalization Plan, also considering each of its axes, with all the processes involved. In addition, the purpose was to identify the monitoring and control mechanisms, its necessary tools and its KPIs.

A report was prepared on the TO-BE Governance Model for the SGAD in which, according to the areas of analysis, **recommendations and proposals** were made, including stakeholders involved on its implementation, roles and responsibilities, measurement and monitoring indicators, tools or systems.

### Main challenges and lessons learned:

- A) The main **challenge**, as in the previous deliverable, arose from the need to modify the priority order, so that some aspects (such as the relationship between effort and benefit of implementing the proposed model) could not be detailed until the Business Case was delivered.
- B) **Lessons learned** include the importance of the AS-IS analysis as the essential starting point to build the improvement proposal and the entire design of the TO-BE model.

## Deliverable 10: TO-BE Governance Process Modeling

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### Brief description of the deliverable and tasks performed:

As part of the configuration of the TO-BE model, the **processes** to be used by the SGAD in the **management of PDAP** were collected for their reconfiguration and improvement. In this way, all the processes required by the SGAD for the correct execution and monitoring of the PDAP were included in a single document; from demand management (reactive and proactive, depending on the agent), to project management (of new projects or modification of existing ones) and portfolio management (all the projects).

To **co-design the TO-BE situation**, as well as to model the governance processes, the project team and the SGAD defined the model to be followed and the necessary details for its modeling in BPMN. For this purpose and based on the AS-IS documents:

- Meetings were held to define the existing processes and sub-processes and the ideal ones.
- The processes were collected, in BPMN and in Power Point, for presenting the outcomes obtained. Specifically, the following processes were defined: demand management, reactive and proactive, depending on the agent initiating them; project management processes, for new projects or modification of existing ones; and the portfolio management process, for the set of projects monitored.
- Documentation was prepared (as communication actions) to train the ministries involved in management process, so that they would be aware of the changes produced in this regard with the new SGAD governance model.

### Main challenges and lessons learned:

- A) The main **challenges** were due to the need to identify the processes in a rational manner to raise them in the BPMN tool and the difficulties of the new regulatory framework introduced by the PRTR, (which impacted on the PDAP project and subproject monitoring model).
- B) As **lessons learned**, the survey and process reorganization and improvement sessions, since this is an activity that can be used to formulate proposals of the TO-BE model.

## Deliverable 11: PoC of monitoring and reporting mechanisms

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### Brief description of the deliverable and tasks performed:

Develop a governance and management model for the Public Administrations Digitalization Plan, a Proof of Concept (PoC) that would demonstrate the usefulness of monitoring the KPIs in a single dashboard.

Due to the regulatory changes (emergence of the PRTR) it was developed:

- The PoC was designed to select two measures from each axis and one measure applicable to the entire Plan, to develop, from them, a **proof of concept** of the proposed monitoring mechanisms, with the dashboards and KPIs, as well as the tools and procedures relevant at that time.
- Initially it was to be developed through **Datalaia**, an asset owned by everis (now NTT DATA) with public sector data management for decision making, with metrics and benchmarks available for impact analysis.
- Finally, due to the contextual and regulatory changes introduced by the **PRTR framework** it was decided to address the monitoring of PDAP projects following the criteria of the PRTR. To this end, the PDAP reporting information was structured according to the Ministerial Orders (OMHFP/1030/2021 and OMHFP/1031/2021) to define the projects, subprojects, actions, etc., and their corresponding milestones and objectives, **to configure a Power BI dashboard (the tool currently used by the SGAD to monitor projects)**.

### Main challenges and lessons learned:

- A) The **challenges** were from the need to adapt the proposed activities to the requirements of SGAD and to the regulatory changes arising from the monitoring mechanism introduced by the PRTR. In addition, to connect both nomenclatures (PDAP and PRTR) by using a BI tool for their monitoring.
- B) Because of successfully addressing the above challenges, we obtained multiple **lessons**. A Proof of Concept was developed, with its updates, useful for the SGAD, taking advantage synergies between the two plans. In addition, a manual for the use of the tool was finally developed.

### Deliverable 12: Updated Communication Plan

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#### Brief description of the deliverable and tasks performed:

An **updated Communication Plan** was delivered, considering the implementation of the most relevant **communicative actions carried out** during the execution of the project to promote the TO-BE model and the internal and external communication.

After meetings with the SGAD team, communicative materials agreed were:

- The team project elaborated a video to show in a dynamic and visual way the **objective of the project and the main results** obtained during its execution, in order to **disseminate the improvements achieved** after the implementation of the governance model defined for the SGAD.
- A **Power Point presentation** compiling information on the development of the project. The challenge for SGAD to implement a governance model and the evolution from the initial situation (AS-IS) to the ideal situation (TO-BE) was presented.
- **Another presentation to present detailed information about project results**. For this purpose, the objectives established at the beginning of the project were related to the results obtained during its development, in order to show in a simple and visual way the improvements achieved after the execution of the project.
- A **training document** (Power Point presentation) to explain to the different Ministries involved in the processes to be followed by the SGAD, its participation and its main roles.
- **Another presentation** was configured to present detailed information about project results. For this purpose, the objectives established at the beginning of the project were related to the results obtained during its development, in order to show in a simple and visual way the improvements achieved after project execution.

### Main challenges and lessons learned:

- A) There were **no relevant challenges** in this activity, because the communication actions agreed with the SGAD were elaborated and provided for implementation.
- B) As **lessons learned**, the capacity to adapt the project to the critical needs and requirements of the SGAD.

### Deliverable 13: Final Project Report

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#### Brief description of the deliverable and tasks performed:

This document is a compilation of **all the deliverables carried out** in order to present the project execution, as well as the main challenges faced by the project team and the lessons learned from each of them. Finally, the main conclusions and elements that could be replicated are presented, as recommendations to be followed after the end of its execution.



## **Deliverable 14: Communication Materials**

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### **Brief description of the deliverable and tasks performed:**

The purpose was to **create communication actions** that could show the project and its execution in a global way, in order to have a **holistic vision** in a dynamic and visual way.

To this end, an **infographic and a Power Point presentation** have been delivered with all the project information, summarizing the tasks performed and explaining the starting point and the results obtained, ensuring media dissemination.

## 5 Main findings and items that could be replicated

### Conclusions:

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The conclusions are a sort of **lessons learned** from the execution of the project, **multiple problems faced** and **strategies for overcoming them**.

Once deliverables have been presented, as well as the challenges and lessons learned from the implementation of each of the activities, the team project highlighted as the main challenge the new regulatory framework introduced by the European Union through the Next Generation Funds, and its translation into the PRTR (and the Ministerial Orders) that regulate the execution and report of Objectives and Milestones. This had had a direct impact into this project, duplicating efforts for the SGAD in terms of reporting and monitoring actions contained in the PDAP-PRTR.

**Other challenges**, above mentioned, emerged during the execution of certain activities (BC, PoC...) or during changes because SGAD critical priorities.

**As global lessons** learned, we highlight the **fluent communication** with the SGA, to focus project phases in order to guarantee its timely execution; tasks executed simultaneously to take advantage synergies between them; the capacity to adapt the activities to the most critical needs of the project; and the importance of coordinating efforts to generate valuable results.

### Useful elements:

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During the execution of this project, some actions are considered key and essential for its development:

- To carry out a first study in which **the expectations** of all the agents involved in the project are collected.
- Carrying out a complete report on the **initial situation** (AS-IS) on which build proposals and actions to improve the governance model to be implemented.
- To identify **existing processes** and the **ideal ones**, to rationalize the inputs, the stakeholders and the possible outputs.
- Carry out a proof of concept that provides value, adapted to the priorities of the project.
- Comparative analysis between the initial situation, the proposed ideal situation, the actions successfully implemented, and the actions proposed for the future according to the efforts invested and the results to be expected.
- Manage the risks arising during project implementation.
- Preserve communications and relationships among all the stakeholders.

## 6 Post-project recommendations

As recommendations to be followed, after the execution of the project, are: firstly, the proposals pending implementation and, secondly, the issues to be initiated based on their final prioritization:

As **pending implementation issues**, the project team noticed:

- The implementation of a single tool that brings together all the existing information, clarifying the processes and interactions between its participants with its implementation or including new tasks and outputs, among others.
- Complete the development of the operational planning of Investment 3 (axis 3 of the PDAP) to obtain a global vision on the monitoring of all the projects to be carried out and reported by the SGAD.
- Launch communication and awareness actions that involve all participants and potential stakeholders in the new PDAP governance model and inform about the new PRTR monitoring and reporting model introduced by the EU.

As **pending proposals** whose implementation depends on the status of their priority, according to the analysis carried out between proposed solutions, effort and benefits, they are compiled for the SGAD future analysis.

- Enable a portal or a communication channel in which the SGAD could control the projects that different actors registered.
- Automate part of the information extraction or the generation of results.
- Keep processes updated and emphasize in their standardization.



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