



IEA Implementing Agreement
Demand-Side Management
Technologies and Programmes

**FORTY THIRD
EXECUTIVE COMMITTEE
MEETING**

**PRE-MEETING
DOCUMENT (PMD)
PART 1**

*17 – 21 March 2014
Wellington, New Zealand*

Forty Third Executive Committee Meeting
17 – 21 March 2014, Wellington, New Zealand

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MATTERS FOR THE EXECUTIVE COMMITTEE

EXTENSIONS OF WORK AND NEW WORK

The delegates are **URGED** to prepare their responses to these presentations carefully and primarily by contacting the possible stakeholders before the meeting. The format for these proposed New Tasks will be a brief presentation that focuses on the:

- **Motivation** for the proposed work (what issues does it tackle?) what is it trying to achieve? Who is the target audience?;
- **Objectives**;
- **Approach** to accomplishing the proposed work;
- **Deliverables** – (what will be delivered? What will you do with it to get it adopted?)
- **Dissemination plan** – what will need to be done to get the results adopted? Who will do it?
- **Required resources**

The proposed New Tasks discussion will aim at one of the following decisions:

1. Decide to **initiate the new Task** based on work done to date.
2. Decide to initiate the **Task Definition** for a new Task. Interested countries must be prepared to assign the appropriate expert(s) to participate in that process.
3. Decide that additional work is needed on the **concept paper**. Interested countries must be prepared themselves, or to assign the appropriate Experts to help further develop the concept.
4. Decide to pursue the subject in co-operation with other parties within the IEA or elsewhere
5. Rejection (or moth-balling)

SEE APPENDIX TO THE AGENDA

Agenda item 1b. ExCo approval of the Agenda – Document A

The Agenda is submitted to the DSM IA ExCo meeting in Wellington, New Zealand with a request for the ExCo to:

- Approve the Agenda

Agenda item 1c. ExCo approval of the 42nd ExCo meeting Minutes – distributed earlier

This item is submitted to the DSM IA ExCo meeting in Wellington, New Zealand with a request for the ExCo to:

- Approve the Minutes from the 42nd Executive Committee meeting

Agenda item 1e. Project Preparatory Committee – Document B

This Status Report is submitted to the DSM IA ExCo meeting in Wellington, New Zealand with a request for the ExCo to:

- Approve the Project Preparatory Committee Report

Agenda item 2a. Strategy Plan – Attachment B – Part 2

This Strategy Plan is submitted to the DSM IA ExCo meeting in Wellington, New Zealand with a request for the ExCo to:

- The ExCo is invited to discuss the attached material that will supplement the request for an extension and ask the Chairs to finalise the material based on the discussion in due time to be processed by the IEA EUWP and CERT.
- The ExCo is also invited to consider the possible future Tasks listed in the appendix and ask the PPC to activate the project development catalogue (“planning basket”).
- Approve the Strategy Plan

Agenda item 3a. Development of a DSM University – Document C

This Status Report is submitted to the DSM IA ExCo meeting in Wellington, New Zealand with a request for the ExCo to:

At the ExCo-meeting in Rigi it was decided to move forward with pilot-cases in collaboration with Operating Agents and:

- a) Return in March 2014 with a more detailed plan (including financing)
- b) Consider future development with more formal training, summer-studies etc.
- c) Continue discussions with possible partners that have similar interests

This is the report on the progress and plans to establish a dissemination effort that we call the DSM University

The ExCo is invited to discuss the report and give further suggestions and guidelines for the development and to approve the timeline and budget.

Agenda item 3b. New Task – Concept Paper: Step Change for energy markets? Demand Side Management (DSM) combined with distributed renewable energy generation? – Document D

This Status Report is submitted to the DSM IA ExCo meeting in Wellington, New Zealand with a request for the ExCo to:

- Approve the Concept Paper and develop further in a Task Definition Phase

Agenda item 3c. New Task – Concept paper on the Impact Assessment of Behavioural Base Energy Efficiency Programmes – Document E

This Status Report is submitted to the DSM IA ExCo meeting in Wellington, New Zealand with a request for the ExCo to:

- Approve the Concept Paper and develop further in a Task Definition Phase

Agenda item 3d. Task 24 – Closing the Loop – Behaviour Change in DSM: From theory to policies and practice – EXTENSION – Attachment C – Part 2

This Status Report is submitted to the DSM IA ExCo meeting in Wellington, New Zealand with a request for the ExCo to:

- Approve and fund the Task 24 extension

Agenda item 3e. New Task – Concept Paper on Information Exchange Forum – Document F

This Status Report is submitted to the DSM IA ExCo meeting in Wellington, New Zealand with a request for the ExCo to:

- Approve the Concept Paper and develop further in Task Definition Phase
- Choose a theme
- Choose Operating Agent for the first two years

Agenda item 4a. Task 21 – Standardisation of Energy Efficiency Calculations – Executive Summary and Final Management Report – Document G

This Status Report is submitted to the DSM IA ExCo meeting in Wellington, New Zealand with a request for the ExCo to:

- Approve the Executive Summary and the Final Management Report which will be presented at the ExCo meeting

Agenda item 5a. Task 17 – Integration of DSM with other Distributed Energy Resources – Phase 3 – Attachment D – Part 2

This Status Report is submitted to the DSM IA ExCo meeting in Wellington, New Zealand with a request for the ExCo to:

- Vote on starting or dropping the Task. If the necessary number of countries is not reached the size of the Task will be decreased by 30k€.

Agenda item 5b. Task 23 – Role of the Demand Side in Delivering Effective Smart Grids – Task Status Report – Document H

This Status Report is submitted to the DSM IA ExCo meeting in Wellington, New Zealand with a request for the ExCo to:

- Approve the Task Status Report

Agenda item 5b. Task 23 – Mid Term Evaluation – Document I

This Mid Term Evaluation is submitted to the DSM IA ExCo meeting in Wellington, New Zealand with a request for the ExCo to:

Note the result and take necessary actions on the recommendations.

In summary, participants have somewhat divergent views on their expectations of the Task, the anticipated results, progress to date and the anticipated value of participation, which perhaps suggests a lack of a shared understanding of the Task objectives. In particular, there seems to be a disconnect on the part of some respondents between what they see as the theoretical/abstract nature of work to date and an expectation that the Task would generate practical guidelines, recognizing that the two are not mutually exclusive and the one can inform the other. A significant minority of respondents (30%) felt that the Task Objectives would not be realised. A first step to addressing this would be to ensure that there is a clear understanding amongst all participants of what the objectives and desired outputs are and the milestones to delivery.

Overall, the collective expertise of the experts engaged in the Task was judged to be adequate but there were concerns that input from some experts had tailed off during the course of the Task. The view was also expressed that better use might have been made of national experts and that the balance between input from experts and that of the Operating Agent was not always optimal though it was recognized that this would have required greater commitment on the part of national experts. It was also suggested that the Task would have benefited from input from experts in the social sciences/behaviour change. There have also been positive steps to engage end-users but more might be done.

On the positive side, the management by the Operating and the level of effort that the OA was putting into the Task was welcomed and it was recognized that pulling together a multi-disciplinary team was a challenge.

In terms of the impact of the outcomes of the Task to date, participants judged that it was too early judge impacts ahead of dissemination of the results of the Subtasks' work.

Recommendations for improvements are:

1. It is suggested that the Task should take the opportunity to revisit its objectives and milestones in order to ensure that there is a shared understanding and agreement of the future direction of work and the anticipated outputs.
2. The Task should consider how best to ensure that the expertise of the national experts is effectively tapped during the analytical stages of the Task's work, recognising the constraints on the time and resources that the national experts are able to commit to the Task.
3. The Task should consider whether there is a need to identify and bring into the project additional expertise on behaviour change, potentially by drawing on the synergies with Task 24, and also explore how best to engage with end-users.

4. The Task should start to plan how it can most effectively disseminate its findings as they emerge and judge its impact.

Agenda item 5c. Task 24 – Closing the Loop – Behaviour Change in DSM: From theory to policies and practice – Task Status Report – Document J

This Status Report is submitted to the DSM IA ExCo meeting in Wellington, New Zealand with a request for the ExCo to:

- Approve the Task Status Report

Agenda item 5c. Task 24 – Mid Term Evaluation – Document K

Note the result and take necessary actions on the recommendations.

In summary, the Task is performing well and has already made significant progress with value being obtained from the work to date and positive feedback from participants. There is a clear vision of what the Task is trying to achieve (recognising that the Task is very wide in its scope) and the objectives are considered to be deliverable with appropriate milestones established for the work.

The collective expertise of the Task participants and the Operating Agents, drawn from a variety of fields, has proved appropriate to the objectives of the Task with largely effective engagement with end users. Management of the Task by the Operating Agent has also been effective and appreciated by participants.

It is probably too early to draw conclusions on the use being made of the task report and the impact it is having but it is encouraging that a number of participants already feel it is having significant impacts. Effective dissemination of the results will be important in ensuring the work has the widest impact. Going forward there are only minor recommendations for consideration by the Task Group

Recommendations for improvements are:

1. The report has only recently been published and it will be important to continue to look for appropriate opportunities to disseminate the findings and to keep under review the use that is being made of the report by policy makers and others.

Agenda item 6a. Task 25 – Business Models for a more effective market uptake of DSM energy services – Task Status Report – Attachment E – Part 2

This Status Report is submitted to the DSM IA ExCo meeting in Wellington, New Zealand with a request for the ExCo to:

- Approve the Task Status Report

Agenda item 6b. Task 16 – Phase 3: Energy Efficiency and Demand Response Services – Task Status Report – Attachment F – Part 2

This Status Report is submitted to the DSM IA ExCo meeting in Wellington, New Zealand with a request for the ExCo to:

- Approve the Task Status Report

Agenda item 6b. Task 16 – Mid Term Evaluation – Document L

This Mid Term Evaluation is submitted to the DSM IA ExCo meeting in Wellington, New Zealand with a request for the ExCo to:

Note the result and take necessary actions on the recommendations.

In summary, the Task is proceeding well with members gaining significant value from their participation and the Task outputs. The objectives of the task were clear and members considered there was a high likelihood that these objectives would be realized with clear and achievable milestones established.

Overall, the expertise of participants and the operating agent is considered to be appropriate in respect of the Task’s objectives and end-users have been effectively engaged through stakeholder meetings, though it was suggested that additional expertise might be required in Demand Response Services.

Participants were appreciative of the management of the Task by the Operating Agent which was rated excellent by 90% of respondents. It also encouraging that participants felt that the Task’s outputs were being effectively disseminated and were already having a significant impact, though there was still room to improve dissemination at the national level.

Going forward there are only minor recommendations for consideration by the Task Group

Recommendations for improvements are:

1. The Task should consider whether it has sufficient expertise available to it on Demand Response Services to fulfill its remit, and if necessary consider where it could source such expertise
2. The Task should continue to consider opportunities for further dissemination of Task Outputs, particularly at the national level

Agenda item 6c. Task 20 – Branding of Energy Efficiency – Task Status Report – Document M

This Status Report is submitted to the DSM IA ExCo meeting in Wellington, New Zealand with a request for the ExCo to:

- The Executive Committee is requested to approve the request of the Operating Agent to grant an extension for the submission of the report on Subtask 5 (Identification of Best Practices in Branding of EE) before the next Executive Committee meeting. Further, the OA will not raise any invoices on any country due to delay in the completion of the Task. The report will be ready in June 2014 and will be presented at the ExCo meeting in October 2014.
- Approve the Task Status Report

Agenda item 7a. Programme Visibility Report – Status – Document N

This Status Report is submitted to the DSM IA ExCo meeting in Wellington, New Zealand with a request for the ExCo to:

- Approve the Task Status Report

Agenda item 8a. Confirmation of the use of seed-funding for new Tasks – Document O

This Status Report is submitted to the DSM IA ExCo meeting in Wellington, New Zealand with a request for the ExCo to:

It is recalled that the IEA DSM-Programme ExCo at its 35th meeting decided to make use of seed-funding as a means to facilitate upstarting of new tasks. The decision reads as follows (item 6 in the minutes from the meeting):

Further, the PPC should have the authority to **propose a seed-loan** to an Operating Agent that puts up a matching amount either by himself/herself or by “parent” participant (country or sponsor). The seed-loan should be part of the budget. Seed-loans will be financed by the common fund and should be agreed upon by the Executive Committee members. The amount of a seed-loan may not exceed USD 25,000 per seed-loan. If a Task is not initiated after the preparation phase, the Executive Committee’s risk will not exceed the maximum of the the seed-loan proposal.

This was a part of a decision to form a Project Preparatory Committee, PPC, that should work along guidelines as shown in the appendix below.

The ExCo is invited to confirm this decision to the use of a seed-fund as described and along the guidelines for the PPC as shown in the appendix

Agenda item 8b. Task Zero – to fulfil the mission of the DSM-Programme – Document P

The Task Zero Outline is submitted to the DSM IA ExCo meeting in Wellington, New Zealand with a request for the ExCo to:

The mission of the Programme is to deliver to its stakeholders, materials that are readily applicable for them in crafting and implementing policies and measures.

In order to do so we have several outreach tools that we need to maintain but also develop to ensure that results are disseminated in ways that are useful for people in everyday practice.

This concerns our:

- Informational tools
- Our networks and in particular the local ones run by ExCo-participants
- Dissemination and the extension with the “DSM-University”

To ensure that the activities are coherent it is proposed to see all these actions in a context that we call “Task ZERO”. A Task that is a mandatory and builds on both cost-sharing and task-sharing.

The ExCo is invited to discuss the report and give further suggestions and guidelines for the development and to approve the guidelines for the budget.

Agenda item 8c. Financial Report 2013 – Status – Document Q – Part 3

This Status Report is submitted to the DSM IA ExCo meeting in Wellington, New Zealand with a request for the ExCo to:

- Approve the Financial Report 2013

IEA Demand-Side Management Programme Forty Third Executive Committee Meeting
17 – 21 March 2014, Wellington, New Zealand

DOCUMENT A
AGENDA

Monday 17 March 2014

09:00 – 17:15

WORKSHOP: Telling the DSM story - How does New Zealand compare to the rest of the world?

Venue: The Ballroom, Foxglove Bar and Restaurant, 57 Customhouse Quay, Wellington.

17:15 -

Drinks and informal networking after workshop

18:30 – 19:30 **Operating Agents Meeting**

Tuesday 18 March 2014

Venue: Boardroom of the **Meridian Energy** headquarters
(see map you have received for directions from the hotel)

09:00 – 10:00

1. GENERAL BUSINESS/WELCOME

1a. Welcome – *Rob Kool*

1b. **ExCo approval** of the Agenda

DOC A
Distributed
earlier

1c. **ExCo approval** of the Forty Second ExCo
meeting Minutes – Rigi, Switzerland

1d. Status of the Implementing Agreement

1e. IEA Relations

- Secretariat news

ATT A

- Contacts with possible sponsors/ new participants

Rob Kool

- IA relations, BCG and ECG, *Rob Kool*

- Report from the Project Preparatory Committee (PPC)

DOC B

- *Rob Kool, Hans Nilsson*

- Report from the workshop – *Paul Atkins*

- Operating Agents meeting report – *Rob Kool*

10:00 – 12:30

(incl. coffee break)

2. THE WAY FORWARD

Strategy Plan – and the way forward – *Rob Kool, Hans Nilsson* **ATT B**

12.30 – 13:30

Lunch

The proposed New Tasks discussion will aim at one of the following decisions:

1. Decide to **initiate the new Task** based on work done to date.
2. Decide to initiate the **Task Definition** for a new Task. Interested countries must be prepared to assign the appropriate expert(s) to participate in that process.
3. Decide that additional work is needed on the **concept paper**. Interested countries must be prepared themselves, or to assign the appropriate Experts to help further develop the concept.
4. Decide to pursue the subject in co-operation with other parties within the IEA or elsewhere
5. Rejection (or moth-balling)

13:30 – 14:00

3. NEW WORK

3a. Development of the DSM University - *Hans Nilsson*

DOC C

14:00 – 14:30

3b. Concept Paper: Step change for energy markets? Demand Side Management (DSM) combined with distributed renewable energy generation? – *Gabrielle Sartori (Australia)*

DOC D

14:30 – 15:00 3c. New Task: Concept paper on the impact assessment of behavioural base energy efficiency programmes – *Harry Vreuls, Netherlands Enterprise Agency* **DOC E**

15:00 – 15:30 3d. Extension Task 24: Closing the Loop – Behaviour change in DSM: From theory to policies and practice. *Sea Rotmann, EECA, New Zealand*
Ruth Mourik, DuneWorks, The Netherlands **ATT C**

To be presented on Wednesday 3e. New Task: Concept Paper on Information Exchange Forum – *Paul Blackmore, New Zealand* **DOC F**

15:30 – 16:00 Coffee break

4. FINAL MANAGEMENT REPORTS

16:00 – 17:00 4a. Task 21 – Standardisation of Energy Efficiency Calculations – Final Management Report and Executive Summary – *Harry Vreuls, NL Agency, Netherlands* **DOC G**

Adjourn Hosted dinner 19:30

Wednesday 19 March 2014

09:00 – 10:30 **5. CURRENT TASKS – LOAD SHAPE CLUSTER**

Task 17 will be presented via SKYPE starting at 10.00 sharp due to time difference between Europe and New Zealand

5a. Task 17 – Integration of DSM with other Distributed Energy Resources – Phase 3 (via Skype) *Matthias Stifter & René Kamphuis* **ATT D**

5b. Task 23 - Role of the Demand Side in Delivering Effective Smart Grids – Task Status Report, *Paul Blackmore, New Zealand* **DOC H**

Task 23 – Mid Term Evaluation **DOC I**

5c. Task 24 Closing the loop – Behaviour Change in DSM: From theory to policies and practice. Task Status Report *Sea Rotmann, EECA, New Zealand*
Ruth Mourik, DuneWorks, The Netherlands **DOC J**

Mid Term Evaluation **DOC K**

10:30 - 12.30
(incl coffee break)

6. CURRENT TASKS – LOAD LEVEL CLUSTER

Task 25 will be presented via SKYPE starting at 09.00 sharp due to time difference between Europe and New Zealand

6a. Task 25 Business models for a more effective market uptake of DSM energy services – *Ruth Mourik, DuneWorks, the Netherlands* **ATT E**

6b. Task 16 – Phase 3 – Energy Efficiency and Demand Response Services – Task Status Report, *Jan W. Bleyl, EnergeticSolutions, Austria* **ATT F**

	Mid Term Evaluation	DOC L
	6c. Task 20 – Branding of Energy Efficiency, Task Status Report, <i>Balawant Joshi, Idam Infrastructure Advisory Pvt Ltd</i>	DOC M
12:30 – 13:30	Lunch	
13:30 – 16:00	7. PROGRAMME VISIBILITY	
	7a. Programme Visibility Report, <i>Sea Rotmann</i>	DOC N
	7b. New website, <i>Sea Rotmann</i> Website statistics	ATT G
	7c. Communications Plan, <i>Sea Rotmann</i>	Distributed separately
	8. ADMINISTRATIVE MATTERS	
	8a. Seed Funding	DOC O
	8b. Task Zero	DOC P
	8c. Financial Report 2013 Accountax Status Report Status of Common Fund payments	DOC Q
	8d. ExCo approval of Forty Fourth ExCo meeting in Austria 15 - 17 October 2014.	
	8e. Decision on plans for Forty Fifth and Forty Sixth Executive Committee meeting	
	10. Other issues	
	Adjourn	
Thursday 20 – Friday 21	The Energy Conference 2014. NERI’s annual conference to be held at Rydges Hotel , Wellington.	

APPENDIX 1

Participant	TASKS¹								
	In force								
	16 ext.	17 ext.	20	21	23	24	Under preparation	25	Under preparation
	Competitive Energy Services Phase III – Energy Efficiency and Demand Response Services	Integration of DSM, Distributed generation,	Branding of Energy Efficiency	Energy Standards	DSM in delivering smart grids	Closing the Loop: DSM From Theory to practice	DSM University	Business models for energy services	Information exchange Forum
Australia									
Austria		X				X	◆	◆	
Belgium	X					X		◆	
Finland		◆					◆	◆	
France			X	X					
Greece									
India			X						
Italy						X			
Korea	X			X	X		◆		
Netherlands	X	X		X	X	X	◆	◆	
New Zealand						X			
Norway				X	X	X	◆		
<i>Saudi Arabia</i>							◆		
<i>South Africa</i>						◆			
<i>Thailand</i>									
Spain			X	X					
Sweden	X				X	X	◆	◆	
Switzerland	X	X		X		X	◆	◆	
United Kingdom,					X	◆	◆		
United States			X	X					
RAP *						◆	◆		
European Copper Institute*		X					◆		
UAE						◆			
OPERATING AGENT (OA)	Jan W. Bleyl-Androschin	Matthias Stifter René Kamphuis	Balavant Joshi	Harry Vreuls	Linda Hull	Sea Rotmann – Ruth Mourik	Hans de Keulenaer Hans Nilsson	Ruth Mourik	Linda Hull

Participates = X Sponsor = * Interested = ◆

¹ All entries on interest and participation for initiated and proposed Tasks are interpretations of the more elaborated responses given by countries and recorded with their details in the final minutes

**ACTION ITEMS RESULTING FROM THE FORTY SECOND EXECUTIVE COMMITTEE
MEETING OF THE DSM PROGRAMME**
16 – 18 October, 2013 – Rigi-Kaltbad, Switzerland

<i>WHO</i>	ACTION	<i>WHEN</i>
Outstanding countries	Pay Common Fund invoice for 2013	ASAP
Participating countries	Pay Common Fund invoice for 2014	On-going
Rob Kool	Maintain contacts with Saudi Arabia, South Africa, Kuwait, Thailand, UAE, Eurelectric, Edison Electric Institute.	Done with Saudi, Thailand, South Africa
Rob Kool	Contact Schneider Electric and confirm their intent to become Sponsors	DONE
Hans Nilsson Hans de Keulenaer	Move forward with the DSM University as proposed	DONE
Matthias Stifter René Kamphuis	Follow-up countries that have expressed interest	DONE
Linda Hull	Finalise Task 23 (May 2014) and present Final Management Report at ExCo meeting in October 2014.	October 2014
Sea Rotmann Ruth Mourik	Develop the Task 24 extension proposal further	DONE
Linda Hull	Develop the concept paper on the Information Exchange Forum further and present in March 2014	DONE
Hans Nilsson Rob Kool	Continue work on items lacking in the End of Term Report	DONE
Rob Kool	Contact ACEEE and ecee and CEEE about joint conferences. Also contact organisers of Renewable Conference and other relevant conferences in the planning stages. Look into arranging a DSM conference every second year	ON-GOING
Ruth Mourik	Prepare the Task Definition Phase for Task 25 and present to ExCo in March 2014	March 2014
Visibility Committee	Draft a web site definition and develop tender	ON-GOING
Operating Agent	Update a more clear definition in legal Annex text of their Task	NOT DONE
Solstice	Provide web statistics every six months	DONE
Harry Vreuls	Prepare the Final Management Report for Task 21 and present at ExCo in March 2014	DONE March 2014
Anne Bengtson	Keep reminding those who have outstanding payments to the Common Fund	On-going
Balawant Joshi	Produce final report by next ExCo and present in March 2014	NOT DONE FMR to be presented in October 2014
Operating Agents	Include 1-2 slides in their presentation, highlighting the main findings to date in their respective Task(s).	Present at next ExCo meeting
Sea Rotmann	Develop a communications strategy for the DSM programme. Support development of individual communications and dissemination plans for all Tasks	Present at next ExCo meeting
ExCo members	Review website regularly and suggest further developments	On-going

Cont. Action Items

ExCo members	Suggest topics for the Spotlight Newsletter and provide input for those articles	On-going
Pam Murphy	Distribute issues of the DSM Spotlight Newsletter	March 2014 June 2014
Anne Bengtson Paul Atkins Sea Rotmann	Prepare administrative details for the Forty Second Executive Committee Meeting in Wellington, New Zealand	DONE
Hans Nilsson Hans de Keulenaer	Prepare status report on the development of the DSM University and send to Anne Bengtson for inclusion in the Pre-Meeting Document (PMD)	DONE
Matthias Stifter René Kamphuis	Prepare Task Status report on Task 17 and send to Anne Bengtson for inclusion in the Pre-Meeting Document (PMD)	DONE
Jan Bleyl-Androschin	Prepare a Task Status Report for Task 16 Phase III and send to Anne Bengtson for inclusion in the Pre-Meeting Document (PMD)	DONE
Rob Kool	Prepare PPC progress report and send to Anne Bengtson for inclusion in the Pre-meeting Document (PMD)	DONE
Harry Vreuls	Prepare a Task Status Report and Final Management report on Task 21 and send to Anne Bengtson for inclusion in the Pre-Meeting Document (PMD)	DONE
Balawant Joshi	Prepare a Final Task Report on Task 20 “Branding of Energy Efficiency” and send to Anne Bengtson for inclusion in the Pre-Meeting Document (PMD)	Task Status Report provided
Linda Hull	Prepare Task Status Report Task 23 and send to Anne Bengtson for inclusion in the Pre-Meeting Document (PMD)	DONE
Sea Rotmann Ruth Mourik	Prepare Task Status Report Task 24 and send to Anne Bengtson for inclusion in the Pre-Meeting Document (PMD)	DONE
Hyeong-Jung Kim Anne Bengtson	Prepare Financial report and send to Anne Bengtson for inclusion in the Pre-Meeting Document	DONE
Anne Bengtson Sea Rotmann	Prepare Visibility Committee Report for inclusion in the Pre-Meeting Document	DONE
Operating Agents	Prepare Task Information Plans and include in each Task Status Report.	On-going
Solstice	Provide statistics for every Task every six months, send to Anne Bengtson for inclusion in the Pre Meeting Document	DONE
Ruth Mourik	Prepare the Task Definition Phase for Task 25 and send to Anne Bengtson for inclusion in the Pre-Meeting Document	DONE
Linda Hull	Prepare the concept paper on the Information Exchange Forum and send to Anne Bengtson for inclusion in the Pre-Meeting Document	DONE
Anne Bengtson	E-mail pdf file of Pre-meeting Document for the Forty Second ExCo meeting to the Executive Committee members and Operating Agents.	Sunday 23 February 2014

AGENDA 1e. (43rd meeting of the IEA DSM Programme)

Document B

Report from the Project Preparatory Committee (PPC) March 2014

Prepared by Rob Kool

This Project Preparatory Committee report is submitted to the IEA DSM IA EXCO meeting in Wellington, New Zealand, with a request for the EXCO to:

- Approve the Project Preparatory Committee Report

Report from the Project Preparatory Committee (PPC)

By Rob Kool

In the past 6 months the PPC has held three telecons and exchanged countless emails. Major topics were:

- **Extension of the Implementing Agreement.**
 - The extension of the Implementing Agreement was discussed. We have a 2 year extension, with the option to extend it to five years. In order to do this additional material on Strategy and the Work Plan have to be provided.
 - Michael Moser (on behalf of EUWP/ECG), Hans Nilsson and Rob Kool had a workshop to work out the details and planning, to be presented at the next EXCO meeting
 - Contacts have been made/continued with 4E, ISGAN and BCG
 - Communication will be adapted as requested, based on discussions at the Rigi EXCO meeting.
- **New Tasks:**
 - Based on the debate on communication a Task Zero will be proposed. The DSM-University will be part of this Task Zero.
 - The Chair and Advisor have approached a number of possible participants for Task 17 and the Task 24 extension.
 - Task 25 is getting into more shape and will be presented at the EXCO meeting.
- **Linda Hulll (Information Exchange Forum)**
 - she has been working on ideas for new Tasks. We want to compliment her efforts and will support her ideas, which will be debated at the next EXCO meeting.
 - Standardized evaluating of behaviour is still in early stages of Task development. Sea Rotmann and Harry Vreuls are discussing the options.
- **DSM University (Hans)**

Progress has been discussed and the results of the first webinar admired. Hans Nilsson, Jan Bleyl and Hans de Keulenaer have turned this into a huge success. Next steps are discussed and will be presented at the EXCO meeting.
- **Communication** has been discussed, with some emphasis on the website. This will be discussed in the report of the Visibility Committee. A bid for a tender for a new website will be available before summer.
- **Members involvement**
 - The USA and Belgium have been visited and options for improved involvement have been discussed. In the case of the USA this led to bilateral contacts to improve Task participation, in the case of Belgium a national DSM workshop will be organised.
 - Contacts with China have resulted in the announcement that NDRC members will join the EXCO meeting as observers.

- Contacts with India and Thailand didn't result in immediate actions, but contacts will be continued.
 - No news/contacts from earlier Middle East countries.
 - Schneider Electric has decided not to join our IA as a Sponsor. They expressed a desire to keep on being linked to part of our work. Together we will elaborate options on how to do this, with the help of our Operating Agents.
- **Possible new members:** South Africa seems to be ready to join now (end of first quarter of the year) Thailand: No progress yet

ATTACHMENT B
Part 2 of the Pre-Meeting Document (PMD)

Strategic Plan 2014 - 2019

18 – 19 March 2014
Wellington, New Zealand

Prepared by Rob Kool and Hans Nilsson

In December 2013 the CERT invited the DSM IA to send additional information to the EUWP in order to get an extension until 2019.

The ExCo is invited to discuss the attached material that will supplement the request for an extension and ask the Chairs to finalise the material based on the discussion in due time to be processed by the IEA EUWP and CERT.

The ExCo is also invited to consider the possible future Tasks listed in the appendix and ask the PPC to activate the project development catalogue (“planning basket”).

Agenda 3a. (43rd Executive Committee meeting of the DSM IA)

DOCUMENT C

The DSM University

March 2014
Hans de Keulenaer and Hans Nilsson

At the ExCo-meeting in Rigi it was decided to move forward with pilot-cases in collaboration with Operating Agents and:

- d) Return in March 2014 with a more detailed plan (including financing)
- e) Consider future development with more formal training, summer-studies etc.
- f) Continue discussions with possible partners that have similar interests

This is the report on the progress and plans to establish a dissemination effort that we call the DSM University

<p>The ExCo is invited to discuss the report and give further suggestions and guidelines for the development and to approve the timeline and budget.</p>
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The DSM University (DSM-U) is here to stay.

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Status and direction

Confidence and attraction are the key issues in building the DSM-University. Our products should be attractive because of their importance for the business of our audience and because they provide reliable information.

The university will be developed gradually at a pace that allows us to deliver.²

Webinars – the heartbeat (rhythm) of the DSM-University

The webinars are the first blocks in this building and they will be developed successively with both our own material and with invited material from other sources in research and in business.

The DSM University is launched with the first webinar that was held on February 4th with a presentation by Jan Bleyl on the topic “ESCO market development: A role for Facilitators to play”. This webinar had 85 visitors covering all parts of the world. For those who did not have an opportunity the presentation is available on the web (<http://www.leonardo-energy.org/webinar/esco-market-development-role-facilitators-play>).

The next webinar will be on March 6th when Laura Maretta will present a recent study made by ISGAN “ISGAN Annex 2 Spotlight on Demand Management”.³

A third is scheduled to April 2nd with the topic “Best Practices in Designing and Implementing Energy Efficiency Obligation Schemes” (<http://www.leonardo-energy.org/webinar/best-practices-designing-and-implementing-energy-efficiency-obligation-schemes>) presented by David Crossley and based on his work for RAP in Task 22.

And then comes yet one more presentation by David on May 7th on “Using Demand-Side Management to Support Electricity Grids” (<http://www.leonardo-energy.org/webinar/using-demand-side-management-support-electricity-grids>) which is based on his work as an operating agent for Task 15.

All the webinars are also announced on our own site (<http://www.ieadsm.org/ViewCalendar.aspx>)

² When talking about the DSMU concept to partners and other implementing agreements, there is considerable interest in the concept. E.g. PVPS is observing the initiative and might consider a PVPS University in the future.

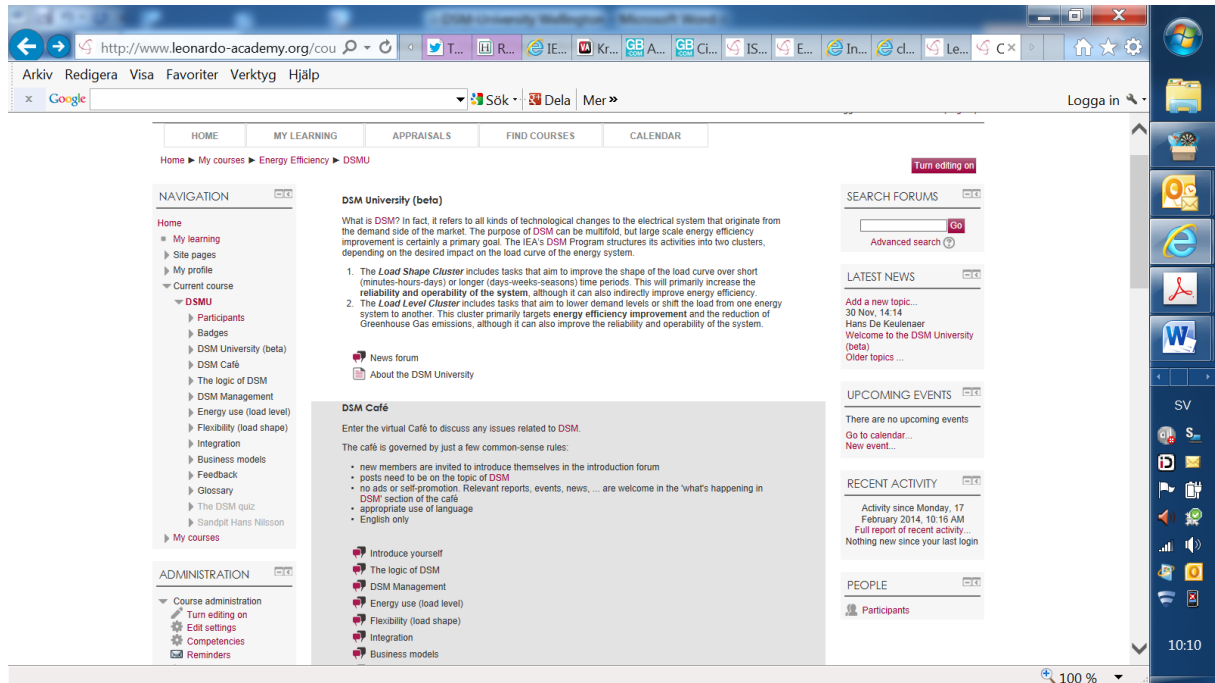
³ Registration is open on (http://www.leonardo-energy.org/webinar/iskan-annex-2-spotlight-demand-management?mkt_tok=3RkMMJWWfF9wsRons6vKZKXonjHpfSx56O8tXqSg38431UFwdcjKPmjr1YIJT8F0aPyQAgobGp515FEKTbnYSbZjt6QKWA%3D%3D)

The webinars are produced by the Copper Alliance using their platform Leonardo Energy which has been used for such purposes over a long time⁴.

WEB-platform

Copper Alliance has also developed a WEB-platform that will allow us to manage the material in structured way and to provide more formal training material as it develops, see print below.

This web platform is based on moodle and allows for a wide variety of interactive services that could be further explored in the future⁵.

The image shows a screenshot of a web browser displaying the Leonardo Energy platform. The browser's address bar shows the URL 'http://www.leonardo-academy.org/cou'. The page has a navigation menu at the top with options like 'HOME', 'MY LEARNING', 'APPRAISALS', 'FIND COURSES', and 'CALENDAR'. The main content area is titled 'DSM University (beta)'. It includes a 'NAVIGATION' sidebar on the left with links to 'My learning', 'Site pages', 'My profile', 'Current course', and 'My courses'. The main content area has a 'What is DSM?' section, a 'DSM Café' section with a list of rules, and a 'NEWS forum' section. On the right side, there are sections for 'SEARCH FORUMS', 'LATEST NEWS', 'UPCOMING EVENTS', 'RECENT ACTIVITY', and 'PEOPLE'. The browser's taskbar at the bottom shows various icons and the system clock at 10:10.

This page can be accessed via www.dsmu.org after registration to obtain data for login. In the current beta phase of the DSM University, around 30 participants have registered. During the second quarter, a launch action for DSMU is foreseen through mass mailing and media.

Contents and sources

The main source is task material and the main resources for delivering are the operating agents (OA), but others should be invited to allow a more complete coverage of all aspects, i.e. specialists other Implementing Agreements and others.

The **task reports** are however not always suitable as educational material because of their length and structure (e.g. cover subjects with logic developed for specific situations). There is a need to edit the reports in several ways e.g. as

- **issue reports** dealing with a selected matter,
- **blogs** putting the material into a context that is actual or topical
- **key messages** that addresses specific target audiences

For new Tasks to be started up, and for ongoing Tasks, it is important to liaise with the DSM-U at an early stage with the Task, so that deliverables are usable in the DSM-U also during

⁴ So far, over 300 webinars have been produced on the LE platform.

⁵ Moodle interactive services include forum, chat, wiki, survey, test, glossary, ...

the work. It might be advantageous to make reports and discuss with wider audiences at different stages of the work.

Products

PRODUCT	STATE
A. Webinars. There should be at least one webinar available per theme and once launched these are available for replays. The webinars must refer to some material to be downloaded and there should be facilities for contacting the DSM-U and/or the presenter. Such contacts could generate further products but is an essential resource to recruit more “market” interest. Webinars can be used as a partnership tool (inviting a partner for a webinar). Webinars have a strong after-life: average 500 views post-event, providing written answers to questions raised, defining glossary terms related to webinar topic, ... ⁶	Up and running
B. 1. Task reports. The simple format for task reports is the report provided for the ExCo, but these are very often too long for a “student”. There is a need for editing and/or extracting. 2. WEB-casts to promote Task Reports	1. Available 2. To be tested
C. Issue reports. Such could be derivate from the task reports but also be edited version where several reports are put together and edited for “readability”.	Should preferably be a spin-off from webinars
D. Summaries. There should be (a) task report summaries and (b) theme summaries (1-2 pagers).	Some first (a) are available on our web-page
E. Blogs. Should be developed to make a more popular presentation that also laymen can use and be used to attract interest for coming webinars	Some first are available on our web-page
F. Key messages. Shorter appeals to target audiences and to make them relate to a topic in a few sentences	Should be considered by the PPC
G. E-learning. The setting for a more formal education. We should eventually be able to deliver courses for more or less formal training	Future opportunity
H. Expert advice. Anyone who have a problem related to DSM should be able to contact us and we will search for an expert that can provide the answer and/or guidance	Should be considered in relation to webinars
I. DSM-U Café. We should have the opportunity for chatting and discussions like we have today on facebook and Linked-in. This café should also be used in developing concepts for tasks with webinars and appeals to find new participants.	The forums for the DSM-U café are available, but need to be ‘activated’.
J. Glossary. Noblesse oblige. IEADSM should provide clear definitions for DSM terms in order to help frame the DSM	System available. First terms

⁶ Ideally, webinars should be integrated into and support tasks. If a task wishes to have certain findings reviewed, presenting them in a webinar could be a logical step.

debate.	defined.
K. DSM Community of Practice. Around the webinars, we intend to gradually build a community of practice of DSM practitioners.	For 2015. But registrations for the various webinars are collected in a DSMU mailing list to provide the core for the CoP.

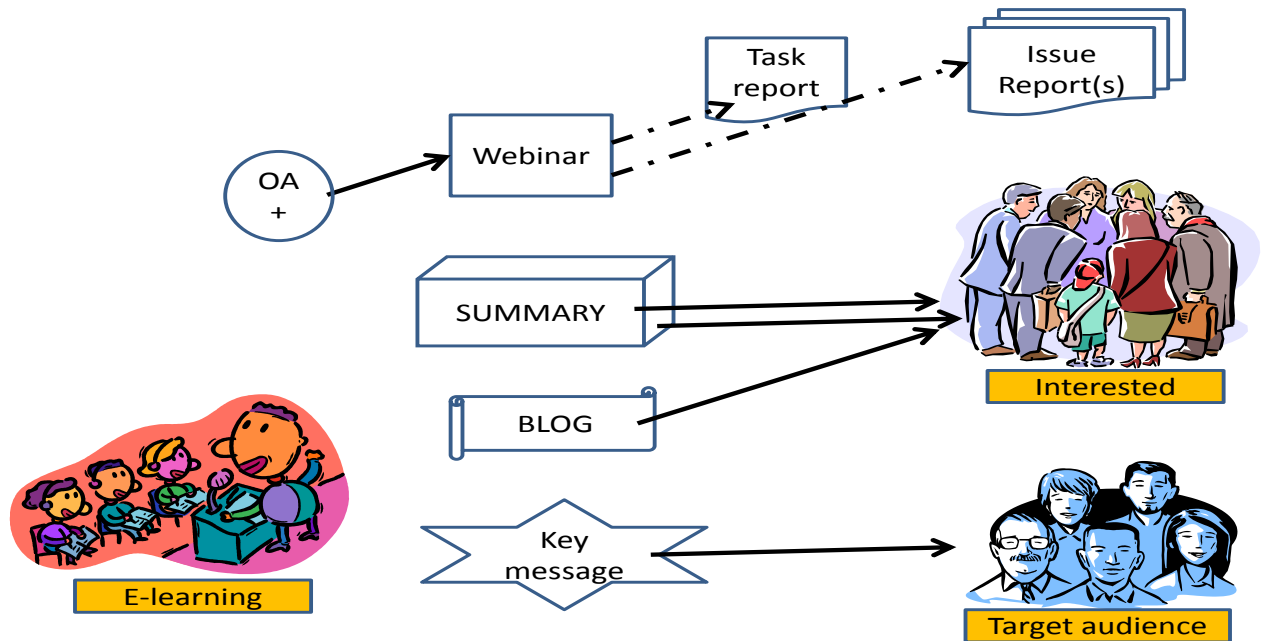


Figure 1: Products, sources and audiences

Target audiences

Target Group	May want to learn about	Primary Themes (Numbers see Structure below)
Policymakers	<ul style="list-style-type: none"> Costs and Benefits Impact on energy systems and related matters 	1-2, 5-6
Managers	<ul style="list-style-type: none"> Organisations (Experts?) Governance Planning Programme structuring Implementation Methods 	1-6
Programme implementers	<ul style="list-style-type: none"> “Tricks” of the trade 	3-5

Table 1: Different actor categories, their “needs” to learn about DSM-issues

Another look at actors is by trying to find out which institutions they represent in society and the function of those. There is a need to mobilise actors both as catalysts and as operators to release the profitable potential for energy savings.

Actor	Function	Aim	Instrument	
Government	Providing institutional setting and incentives/policies	Welfare (including Security and Prosperity)	Law, Taxes, Subsidies, Information, Regulation	
Municipalities	Specific institutions (e.g. planning, monitoring)	Public good	Plans and activities within a given jurisdiction	
Utilities	Provider	Business (profit)	Energy	Energy Services
Supplier (hardware and services)	Provider	Business (profit)	Goods	
User	-	Service (Light, Power, Climate)	Behaviour change	

Table 2: Actors, their function and their interest in the process to achieve energy efficiency

Channels

DSM-U products are promoted through a variety of channels. e.g.

- Leonardo ENERGY mailing list operated by the Copper Alliance
- ECEEE event page & mailings
- IEADSM website and exco
- Clean Energy Solutions Center

As the DSM-U develops, further channels should be added to extend the reach of the initiative (e.g. ACEEE? EURELECTRIC? ...)

Partners

We will not be able to cover all aspects of DSM and will need to make use of material and experts from other institutions and companies. Such will be invited to present themselves and their material within the structure of the DSM-U. In some cases it would be advantageous if partners would also care to join the DSM-Programme and be more active in using the DSM-U actively.⁷

Structure

There is a structure with six themes developed. These should cover all aspects of DSM and allow the audience to orientate and find issues of concern for anyone interested, see attachment for details. The themes, 1-6, (and subthemes) are recorded below. The subthemes serve more as an indicator of the contents within each theme.

The division between themes will however not be indisputable which can be seen from the scheme in the attachment.

⁷ In the future, DSM-U can allow for structural partners, such as NGOs, who morally support the initiative on an ongoing basis.

1. **The Logic of DSM**, in which motivations and overview is presented in particular to decision makers and people who wants to see how issues connect to each other
 - a) **Strategies for DSM**
 - b) **The role of Efficiency and flexibility in systems (IDSM)**
 - c) **Actors, and their roles/relations, to make DSM a reality**
 - d) **DSM potential and costs (including rebound)**
2. **Governance (or DSM Management)**, in which incentives, cost/benefit, planning, evaluation and regulation are dealt with but also institutional behavioural issues such as barriers and biases.
 - a) **Incentives (carrots and sticks)**
 - b) **Evaluation**
 - c) **The plethora of benefits (and for whom)**
 - d) **Planning and regulation**
 - e) **Barriers and biases**
3. **Energy use (Load Level)**, technologies and measures to promote load level changes including strategic shifts of energy use to reduce carbon emissions.
 - a) **Obligations and certificates (applications and practice)**
 - b) **Network and grid issues**
 - c) **Equipment**
 - d) **Calculation**
 - e) **Business models**
4. **Flexibility – (Load shape)**, technologies and applications in DR systems and as regards customer benefits and participation
 - a) **Incentives (Pricing to reflect capacity needs)**
 - b) **Demand response practices and market segments**
 - c) **Technologies**
 - d) **Market models**
5. **Integration**, putting energy efficiency, storage and RES together to systems
 - a) **Preparing for integration**
 - b) **Practical examples**
 - c) **Incentives**
6. **Business models**, to deliver energy services
 - a) **Empowering users**
 - b) **ESCOs and EPCs**
 - c) **Municipalities**
 - d) **Market Transformation**

Coordination of IEADSM external identity

IEADSM starts to be dispersed on the web. We count:

- IEADSM website
- DSMU website
- Task websites
- Social media presences (LinkedIn, Facebook, ...)

A reflection is needed, between the visibility committee, DSM-U and Tasks to streamline IEADSM's web presence.

Timeline and Budget

	3m	6m	9m	12m	15m	18m	21m	24m	Budget (days)
Developing Products									
A. Webinars.	One every month (Scheduling by Chairs and Secretary)								Moderation and communication by Copper Alliance (32)
B. 1. Task reports. 2. WEB-casts	Exists								
			1	1	1	1	1	1	Duty of OAs (6)
C. Issue-reports.		1	1	1	1	1	1	1	Editing (7)
D. Theme-Summaries.			2	2	2	2	2	2	Compilation (12)
E. Blogs.	1	1	1	1	1	1	1	1	Writer (8)
F. Key messages.			1	1	1	1	1	1	Writer (6)
G. E-learning.						x	x	x	-
H. Expert advice.						x	x	X	-
I. DSM-U Café.	1	1	1	1	1	1	1	1	Moderation (8)
Management	2	2	2	2	2	2	2	2	(16)
Reporting	2	2	2	2	2	2	2	2	(16)
SUM									111 days at 1k\$

Appendix: Theme-building

The following is an attempt to categorize the field of DSM in themes that will allow more focused communication with stakeholders about what DSM can achieve. The themes are shown with a sketch of how we can package existing results and deliver lectures (primarily webinars) and organise deliverables that makes the results more accessible. The deliveries range from exiting report for download to edited versions of the reports and shorter “blog”-texts to entice interest.

The DSM-Programme does not cover all aspects of DSM and it has been added to the themes suggestions for additional presentations and presenters. It would be advantageous if we could recruit “guest-professors” with some standing to these.

The themes should cover the entire spectra discussed with the old clusters (load shape and load level) as well as the newer aspects Potential (planning) and Acceptance, Uptake (Business Models and behaviour).

Themes

1. The logic of DSM

This theme should motivate decision makers to undertake DSM actions and set up organisations for the job. For practitioners the presentations should justify different actions and put them into a perspective how they relate to each other.

Possible issues are:

- What does DSM do (change load level and load shape) and what are the consequences (economic and system reliability)
- Why DSM (to get a level playing field and use resources wisely)
- Who does DSM and why (utilities, governments)
- Potential (negative costs) and rebound (do more with less)
- What is DSM coming to (IDSM)

Resources and material:

Issue/Source	Lecturer
The strategy	Chairman (past and present)
Theme chapters from Annual Reports	Chairman (past and present)
WEO 2012 EE Scenario	Laura Cozzi (or Fatih Birol!)
Task 9 on Municipality issues	Someone from The EU Mayor Initiative or equal
Task 13 on DR principles	Larry Jones (Ahlstrom)?
Task 18 on Climate impact and funding opportunities	OA Crossley + someone with insights from latest developments + Anders Wijkman
Task 24 Behavioural issues	On the potential that is “locked-in” when behaviour is not addresses

2. Governance

The governance sections should provide

- a) principles for governance to enable the participant to distinguish some “dos” from some “don’ts”
- b) Good examples from different parts of the world and under different regimes in terms of institutions, tradition, market organisation etc.

The participant should be able to ask the right questions in setting up their own DSM-system. Possible issues are:

- Which are the incentives
- What does all the benefits yield and for whom
- Planning (IRP) and regulation
- Barriers and biases and how to get around them
- The customer/user and how is he/she a resource (Behaviour)

Resources and material:

Issue/Source	Lecturer
Task 1 and 21 Evaluation	OA possibly supported with case person
Task 6 (and 4) measures for DSM	OA Crossley + support with more recent cases e.g. Eric Gudbjerg (DK)
(Task 21) Standards	Siderius 4E? + Top runner (Sophie Attali?)
Task 22 EEO + 14 White certificates	RAP Crossley + OA Capozza (?) + Eoin Lees

Task 24 Behavioural issues	On the how empowerment of customers can be realised
The plethora of benefits (IEA Spreading the net)	Lisa Ryan?
IRP	RAP Moskovitch?
Regulation	RAP Cowart?
Barriers and biases	? (Behavioural economist, maybe from IDEA 42?)

3. Energy efficiency - Load level (technical issues)

The concentration should be on technologies BUT in such a format that the participant understands how the equipment fits into the “big” picture

- What are the technologies, who delivers and at what costs
- How technologies can be redesigned to fit and support users behaviour and capacities

Resources and material:

Issue/Source	Lecturer
Task 14 White certificates	Experiences from deliveries in Italy Capozza and the regulating authority
Task 15 Networks	OA Crossley + ECI experience on transformers?
Task 22 EEO	Deliveries + ACEEE experience from EE as a resource (Dan York?)
Task 21 Calculating	OA
Task 24 Behavioural issues	On the design of technologies that facilitates use
Equipment and development	4 E
Updating the “McKinsey” curve	???

4. Flexibility - Load shape (technical issues)

The concentration should be on technologies BUT in such a format that the participant understands how the equipment fits into the “big” picture

- What are the technologies, who delivers and at what costs
- How technologies can be redesigned to fit and support users behaviour and capacities

Resources and material:

Issue/Source	Lecturer
Task 8 Bidding + Task 11 ToU Pricing	OA Linda + Case (Norway?) + relevant US case on TOU
Task 13 (and 2)	Linda?
Task 23 (and 19) DSM and smart grids	Linda + ?? + ACEEE experience from EE as a resource (Dan York?)
Task 24 Behavioural issues	On the design of technologies that

	facilitates use
Equipment and development	ISGAN ??
Updating “Benefits of demand response....” ⁸	Ask Larry Mansuetti

5. Integration (with RES and distributed generation)

How does DSM enable a more sustainable system with more RES and distributed generation?

Resources and material:

Issue/Source	Lecturer
Task 17 Integration	Seppo, Rene and Matthias
Check “Strategies and Decision Support Systems for Integrating Variable Energy Resources in Control Centers for Reliable Grid Operations”	Lawrence Jones Alstom?
IA Wind	?
IA Storage	?
IA Renewables	?
Examples of changing companies	?

6. Business models

Business models (have to) develop to focus on the service of energy rather than on energy itself. Old models, that have been tested, like EPC and ESCO and new (like EPC and ESCO) that needs to be developed.

Resources and material:

Issue/Source	Lecturer
Task 3 Technology Procurement	Hans Nilsson and Nils Borg
Task 5 Marketing and Task 7 Market Transformation + Task 20 Branding	Verney Ryan ? (Now in NZ)
Task 9 Municipalities	?
Task 16 (and 10)	OA Bleyl
Task 14 White certificates	Capozza on how eligible parties have evolved
Task 22 EEO	??
Task 25	Ruth
Utility that has changed	
Customer that has benefited from change	

⁸ <http://emp.lbl.gov/sites/all/files/REPORT%20lbl%20-1252d.pdf>

	Business models	Integration	Flexibility-Shape	Energy Efficiency - Level	Governance	Logic	
					X		1. Evaluation
			X				2. Communication
	X			X			3. Procurement
					X		4. Planning
	X						5. Marketing
Priority (4 and 6)					X		6. Promoting DSM
	X						7. Market Transformation
			X		X		8. DSM Bidding
	X					X	9. Municipalities
	X						10. EPC
			X		X		11. TOU Pricing
					X		12. Standards
Obsolete ???			X			X	13. DR Resources
	X			X	X		14. White Certificates
				X			15. Networks
Priority 10 and 16)	X	X					16. ESCO
		X					17. Integration
					X	X	18. DSM and Climate
			X				19. Micro DR
	X						20. Branding
Priority ????				X	X		21. Calculation of Savings
Priority (10 and 22)	X			X	X		22. EEO
Priority (19 and 23)			X				23. DSM and smart grids
			X			X	24. Behavioural issues
	X						25. Business models

Obsolete material
Closely related
Closely related
Never started
Closely related
Closely related
Not likely to finish

AGENDA 3b. (43rd meeting of the IEA DSM Programme)

Document D

Concept paper: Step change for energy markets? Demand Side Management (DSM) combined with distributed renewable energy generation?

March 2014

Prepared by Gabrielle Sartori, Australia

This Concept Paper on: Step Change for energy markets? Demand Side Management (DSM) combined with distributed renewable energy generation? is submitted to the IEA DSM IA EXCO meeting in Wellington, New Zealand, with a request for the EXCO to:

- Approve the Concept Paper and develop further in a Task Definition Phase

Concept paper

Step Change for energy markets? - Demand side management (DSM) combined with distributed renewable energy generation?

Demand side management (DSM) has been investigated widely as a strategy to also influence residential and industrial energy consumption. Flexible energy tariffs are often proposed as a possible tool of DSM to reducing electricity load and therewith minimise peak demand. DSM and Distributed Renewable Energy Generation (DREG: small-scale generation embedded within customer sites) are concepts that have been around for many years. However, they are rapidly becoming core elements of a new utilities landscape as energy markets start to change. By reducing power consumption, saving money on power bills, and making environmentally friendly choices, consumers can create their own negawatts.

This Task will be investigating how Demand Side Management (DSM) combined with distributed renewable energy generation (DG) can play an important role in reducing residential and industrial power consumption, deferring or avoiding capital expenditure, and therewith improving the use of network assets.

The Task will:

1. Perform a comprehensive analysis of various economic incentives and fiscal measures, including pricing systems, tariffs and levies that stimulate/influence DSM.
2. Develop new tools for international comparison of the impact of different tariff systems on energy consumption.
3. Investigate drivers and impact of DSM and DREG across the industrial and residential sectors and jurisdictions
4. Investigate the impact of reduced peak energy demand on network operators across jurisdictions

Deliverables

1. Reports
2. Workshops with stakeholder groups
 - a. Industry participants/associations
 - b. Residential/community
 - c. Government
 - d. Universities
 - e. Utilities
3. Conferences – Seminars
4. Social media presence

Personal qualifications to undertake the Task

1. Experienced public speaker (IETA, IEA, IPEEC)
2. Experienced lecturer and workshop organizer (International Energy Centre, Australian Renewable Energy Agency, Energy Efficiency Opportunities)
3. Excellent working relationships with federal and state government agencies in Australia
4. Broad network of energy and energy efficiency related institutions worldwide

AGENDA 3c. (43rd meeting of the IEA DSM Programme)

Document E

Concept paper: The impact assessment of behavioural base energy efficiency programmes

March 2014

Prepared by Harry Vreuls, Netherlands Enterprise Agency

This Concept Paper on: The impact assessment of behavioural base energy efficiency programmes is submitted to the IEA DSM IA EXCO meeting in Wellington, New Zealand, with a request for the EXCO to:

Next steps

- Exco indicates interest and will provide the foreseen OA with contact information on country experts
 - OA will organise discussions with the experts to improve the scoping paper into a draft work plan
 - OA will circulate the draft work plan to Exco delegates and others to improve the draft
 - A revised draft work plan will be incorporated in the PMD for the October meeting of the Exco
 - Exco decision in October to start the work, to revise the work plan or decide not to accept the work plan.
- Approve the Concept Paper and develop further in a Task Definition Phase

Potential new work for the IEA DSM Agreement: Impact assessment of behavioral base energy efficiency programmes

Scoping document for the EXCO meeting March 2014, Wellington
Harry Vreuls⁹

Introduction

Household behavior has been identified as an efficient and effective source for energy savings and demand response. Up to 20% of potential savings using currently available technology are indicated in pathways for future energy systems. For many year utilities, government and other organizations are implementing behavioral based energy efficiency programmes. Despite the wide variation, these programmes are all based on the idea that consumers can be encouraged to use less energy or use energy at different moment or from different energy sources, if the underlying determinants of their behavior change in some way. Also in industry the introduction of environmental or energy management system is based on the same idea.

Behavioral base energy efficiency programmes are most common evaluated taken the (measured) energy use before and after the programme as dependent variable. Evaluations are showing a significant variation in the impacts among the participants in the programme. These variations remain mostly unexplained.

While energy savings of changes of technologies are counted for many years (up to 20-30 years for e.g. housing insulation) the savings resulting from behavioral base energy efficiency programmes are much shorter: only during the time the programme is running up to 1-3 years. The life-time of the behavioral based energy savings are strongly correlated to the continuation of stimuli for the behavioral change.

Research on comparison across evaluation of behavioral base energy efficiency programmes is missing and the few studies conducted clearly indicate that there is a wide variation in the way that data are collected, structure of questions and the persistence of the savings. Questions about perceptions and attitudes are often not well treated in the question design of the evaluation.

Needs

As more and more of the potential of energy savings from behavioral change is utilized, there is an urgency to ensure that evaluation of such programmes are done in a rigorous manner. For this a new tool or tools should be developed to be used to improve consistency of evaluation of behavior base energy programmes. Such tools for the energy savings should be a comparable one with those developed in psychology/education (e.g. IQ tests, Rohrschach test for diagnosis for psychiatric treatment) and visualize the link between an intervention and the change in energy use.

To compete with technology driven energy savings programmes, the energy savings from behavioral based programmes should last longer. The introduction of smart meters provides new opportunities to continue stimuli for behavioral changes. Communication on energy use and savings should become a market. App developers should provide the consumers with

⁹ With thanks to Ruth Mourik, Sea Rotmann and Berth Karlin for their discussion on the topic

tools that provide continue personalized feedback using the households information and aggregate data for larger scale impacts to ease impact evaluation.

These two needs should be seen in combination: develop the tool for more consistent data collection and evaluation and ensure that this is used in new apps (e.g. Opower ‘energy in your pocket’) and visa versa.

Topics/ Potential subtasks

Subtask 1: Assessment of Current Practise: current studies, current apps

- Assessment of current (best) practices
- Assessment of current evaluation methods and measurements
- Assessment of relevant research in energy world
- Collection of idiosyncracies in relevant scientific fields
- Assessment of energy communication apps and there cultural/society links

Subtask2: Assessment of Potentials

- Existing behavioral standard
- Existing software standards for apps
- Identification of key gaps
- Identification of needs and potentials for tools

Subtask 3: Design of instrument(s): tools and metrics for evaluating behavioral based energy saving programmes

- Development of a maximum of 3 tools
- Test the most promising tool in (at least) two countries
- Discuss the use of tools in developing and conducting evaluation
- Potential of the tool for international standardization work

Subtask 4: The use of data/information from apps in evaluation

- Discussion with apps developers
- Discussion with relevant stakeholders
- Privacy regulation for data use
- Apps ranking

Subtask 5: Test of instruments in combination with apps

To be decided depending on the outcome of previous subtasks.

Subtask 6: Communication

Next steps

Exco indicates interest and will provide the foreseen OA with contact information on country experts

OA will organise discussions with the experts to improve the scoping paper into a draft work plan

OA will circulate the draft work plan to Exco delegates and others to improve the draft

A revised draft work plan will be incorporated in the PMD for the October meeting of the Exco

Exco decision in October to start the work, to revise the work plan or decide not to accept the work plan.

Agenda 3d. (43rd meeting of the IEA DSM Programme)

ATTACHMENT C

Part 2 of the Pre-Meeting Document (PMD)

Task 24

Closing the Loop – Behaviour Change in DSM: From Theory to Practice

Proposed Extension

Dr. Sea Rotmann – New Zealand

Dr. Ruth Mourik – Netherlands

This proposal for an extension for Task 24: Closing the Loop – Behaviour Change in DSM: From Theory to policies and practice is submitted to the DSM ExCo with a request to:

- Approve the proposed Extension of Task 24

Agenda 3e. (43rd meeting of the IEA DSM Programme)

DOCUMENT F

**Concept Paper:
Information Exchange Forum**

**Proposed by EA Technology, United Kingdom
Linda Hull**

The Proposal is submitted to the ExCo with the request to:

- Approve the Concept Paper and develop further in Task Definition Phase

IEA Implementing Agreement on Demand Side
Management Technologies and Programmes

New Task Proposal

Information Exchange Forum

Operating Agent (to be approved by ExCo):-

EA Technology
Capenhurst
Chester CH1 6ES
United Kingdom

Issue 1

February 2014

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1 Introduction

Since the inception of the IEA Demand Side Management program in the early 1990's there have been many challenges faced by governments and businesses. These challenges include the need to conserve valuable energy resources whilst ensuring that energy supply security is not compromised. In addition, there is the requirement to integrate increasing levels of intermittent renewable energy sources onto electricity networks that were not designed for that purpose. Despite these challenges, the potential for demand side management to provide solutions to these challenges has remained largely untapped.

Different countries have adopted various approaches towards the demand side. They are motivated to do this in many cases by their different starting points. For example, the different natures of the problems that they are trying to overcome: such as different energy infrastructures, different regulatory or organisational backgrounds, different sociological approaches or different attitudes to energy.

It is believed that understanding the similarities and differences that exist provides valuable learning for the development of future Demand Side Management programs. Exchanging information and supplementing their knowledge base enables more efficient, effective and targeted use of demand side technologies, services, and commercial products.

Therefore, it is proposed that a new Task be established within the IEA Demand Side Management Implementing Agreement to facilitate the exchange of information between participating countries. This proposal is in line with the objectives of the Extension of the IEA Demand Side Management Programme which states that it intends to facilitate:

“A global exchange of experiences . . . in order for countries to develop both models for implementation that facilitates trade across borders and create a base for facilitating/enabling technologies to be developed, produced, shipped and used in a way that improves their performance and makes the cost for the applications acceptable.”¹⁰

¹⁰ End-of-Term Report for the IEA Demand-Side Management Programme 2008-2012, p3

1.1 Background

Many countries have adopted different approaches towards Demand Side Management. Different technologies such as smart meters and smart appliances (air conditioning, heat pumps and washing machines) have been tried in different countries.

In some cases, different commercial practices such as different pricing structures (for example, critical peak pricing, time of use tariffs, etc.) have also been implemented. Some countries have taken a mandatory approach to measures while others have required participants to opt in to schemes or put in place incentives to participate in schemes.

It is generally accepted that there is no single action that can be implemented to achieve perfect demand side management and that complementary packages of measures will be required in particular countries. This may include some common measures applicable to a wide range of applications as well as bespoke approaches.

The exchange of information on Demand Side Management activities, including those which have been tried, tested, abandoned or adopted, between participants will allow a better understanding of which practises are successful and which have not worked in different scenarios. In particular understanding the interaction, both positive and negative, between measures is important – the adoption of one measure into a package of existing measures to improve demand side management could produce undesirable effects that worsen the situation rather than improve it.

However, sharing knowledge and experience between individuals is not deemed sufficient in such a complex technical-socio-economic arena as demand side management. What is needed is a “knowledge/experience-base” (more simply a “Knowledge-Base”), not a database.

Ultimately, this Knowledge-Base, or more correctly the knowledge it contains, can help governments, energy industry regulators, energy businesses and other stakeholders make informed decisions regarding implementation of demand side management.

2 Aim and Objectives

The aim of the proposed Task is to facilitate the gathering, collation, exchange and comparison of information, knowledge and experience between participating countries on topics of common interest in the demand side management arena.

It is suggested that the Task run for an initial term fixed term, say two years. After this time the project can be extended and/or a new Operating Agent allocated.

The ultimate aim of the Task is to establish an online Demand Side Management Knowledge-Base that will be accessible through both the IEA Demand Side Management website and the Demand Side Management University section of the Leonardo Energy website. This Knowledge-Base shall be designed so that users can research the knowledge through pre-set queries/reports and user-friendly query/report engines.

In the first year the Operating Agent would research and establish a suitable Knowledge-Base tool and web reporting/analysis tool for the purposes of the Task. It is hoped that this will be a single system, i.e. the web reporting/analysis tool being the front end of the Knowledge-Base tool.

At the same time the Operating Agent will work with the Task Participants to choose a pilot theme for research in the first year and develop knowledge and experience gathering tools and techniques to collect and collate the information required for the Demand Side Management Knowledge-Base.

Thereafter, every six months, a theme would be chosen for research by the Task Participants. The Operating Agent would be responsible for co-ordinating the gathering of information from the Task Participants and other sources, the collation and the entry of information into the Knowledge-Base.

So, by the end of the initial two year Task programme, three demand side management themes will have been researched, collated and entered into the Knowledge-Base.

The ongoing maintenance of the information held in the Knowledge-Base will be the responsibility of the Task Participants and, hopefully, all members of the IEA Demand Side Management Implementation Agreement. In time, it could be envisaged that all IEA member states and even other stakeholders in demand side management could be invited to participate in populating the Demand Side Management Knowledge-Base. The role of the Operating Agent being to maintain the functionality of the Knowledge-Base and moderate information entry and collation.

EA Technology would be welcome the opportunity to act as Operating Agent for the initial two year term of the Task.

2.1 Scope

The Task will be open to all members of the IEA Demand Side Management Implementing Agreement.

The theme or topic for research in each period would be chosen by the Task Participants, for example via a voting system.

Suggested themes for this information and knowledge sharing task include:

- Approach to regulation, and how this impacts on the opportunities for Demand Side Management;
- Stimuli for the development of Demand Side Management technologies and business models;
- Expected new loads (e.g. electric vehicles, heat pumps) and their impact on the energy system and Demand Side Management.
- Energy efficiency obligations on utilities;
- Overview of relevant market developments and relevant stakeholder developments
- Behavioural interventions to promote Demand Side Management Smart grid integration Evaluating Demand Side Management interventions beyond kWh estimates
- Demand Side Management and Transmission System Operators – roles and responsibilities, actions, successes and failures.

3 Benefits

Participation in this new Task will enable Task Participants to:-

- Compare the relative merits of Demand Side Management measures and activities based on the experience of different countries.
- Use the analysis of the information held in the Knowledge-Base to influence the development of Demand Side Management schemes and policy in their own country, region or industry.

The outputs of the proposed Subtask would be of benefit to all organisations and individuals that have an interest in understanding the factors that influence the success of demand side management measures, including:-

- **Energy Companies:** Energy Suppliers and Energy Network Companies who have interest in developing Demand Side Management schemes have an opportunity to gain an insight into the merits of single and combined Demand Side Management measures.
This information could then be used to shape either trials or business-as-usual activity, with a higher chance of success due to the consideration of the experience of others. The Knowledge-Base could be used to gauge whether a Demand Side Management scheme is the most appropriate solution to be used in a particular situation - for example, showing the level of investment required to obtain a desired demand response, which could then be compared to other solutions. Demand Side Management measure implementation could also be targeted at customer segments with the optimum demand side management outcomes.
- **Regulators:** The proposed Task would provide an understanding of the relative merits of different approaches to Demand Side Management in different countries, with different or similar infrastructures, markets, attitudes to energy and so on. This would inform regulators on the type of regulation that may be required to stimulate Demand Side Management in their country.
- **Policy Makers/ Governments:** Policy in relation to Smart Grids and Demand Side Management has the potential to impact customers and the way they use energy. By understanding the relative merits of different policy, legal and fiscal measures policy makers

and governments can shape policy around Smart Grids and Demand Side Management in a way that will be optimum to their particular country and its situation.

- **Equipment Developers/ Suppliers:** The success or otherwise of different technological solutions in Demand Side Management in different countries, with their different regulations, markets, infrastructure and attitudes to energy can inform equipment developers/suppliers about the relative merits of their products in differing situations and their applicability to new countries/markets/situations. More to the point, the Knowledge-Base should also enable equipment developers/suppliers to identify technology gaps that need to be addressed through innovation in technology or application propositions.
- **Additional Service Providers:** In a future Smart Grid, a number of other service providers could enter the market providing Demand Side Management services to energy users. Experience of such interactions in other countries and market types from the Knowledge-Base could inform nascent additional service providers about what works and what doesn't in particular situations, market types, regulatory regimes and so on.
- **Customers / Small Business Organisations:** The Knowledge-Base would also provide a better understanding of various Demand Side Management measures and the potential benefits of such measures to individuals and small businesses and so encourage them to support the implementation of Demand Side Management measures.

In essence, this Task is likely to be of interest to a wide range of organisations with an interest in developing Smart Grid and Demand Side Management propositions with consumers.

4 Programme of Work

The suggested approach for the organisation of this Task is that an Operating Agent be appointed for an initial fixed term of two years.

In the first year the Operating Agent will select and procure a Knowledge-Base tool and online reporting/analysis tool to deliver the Task.

Also in the first Year the Operating Agent and the Task Participants will select a theme or topic of interest.

- National Experts will be recruited from the participating countries.
- A Task meeting/workshop will be held during the first six months of the first year to confirm the scope of topics to be considered within the chosen theme, and to identify areas of specific interest to participants.

The Operating Agent will then be responsible for producing information gathering protocols that the Task Participants shall use to gather information from their respective countries.

The Operating Agent will gather, collate and analyse the returned information using the Knowledge-Base tool, drawing out synergies and differences between the different national approaches.

The Operating Agent will develop standard queries reports that users of the Knowledge-Base can browse and also a user-guide for a query engine that users can utilise to produce bespoke reports for their own use.

This analysed information, together with the completed questionnaires and all other gathered information will be published on the online reporting/analysis tool accessible to the Task Participants only.

In the second year the theme selection, information gathering process will be repeated twice. Thus, three Demand Side Management themes/topics will have been researched and published on the Knowledge-Base by the end of the second year. At this time the Demand Side Management Knowledge-Base should have sufficient information in it to make it usable

to other beneficiaries of the Task and consideration should be given to making the Knowledge-Base available to all IEA DSM members, and / or the public.

At the end of each theme research activity, participating countries will take on the responsibility of keeping their specific country's information on the Knowledge-Base up to date.

Demand for further research into other themes and topics should be assessed at the end of Year 2 to decide whether to extend the Task. If there is no decision to extend the Task, a decision will need to be made about who is to take responsibility for the maintenance and moderation of the Knowledge-base in the future. This could fall within the remit of the DSM University, or become a role of IEA DSM Webmaster.

This process is illustrated in the outline project plan shown in Figure 2. A more detailed project plan is provided at the end of this section (Figure 2)

Results

The output of this Task would be an online Demand Side Management Knowledge-Base comprising:

- All raw data collected; which can be browsed by users
- Pre-set (standard) queries reports; which can be viewed by users
- A query engine; which can be used by users to produce bespoke reports for their own use (and which can be saved for re-use or published to all users)
- Administration area; where National Experts and other nominated representatives can update the Knowledge-Base



Activity/Sub-Activity	Month																							
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
1 Procure & Develop Knowledge-Base	█											█												█
2 Research First DSM Theme	█											█												
3 First year report												█												
4 Research Second Theme													█	█	█	█	█	█	█					
5 Research Third Theme																				█	█	█	█	█
6 Launch Knowledge-Base on IEADSM and DSM University																						█	█	█
7 Final Report																								█

Figure 2. Outline Project Plan

Each of these Task Activities are explained in more detail in the following section. Please refer to a detailed project plan diagram on Page 29 (Figure 2) when reading this section.

Activity 1: Procurement of Suitable Knowledge-Base Tool & Internet Interface

The purpose of this activity would be to identify and procure a suitable Knowledge-Base tool and internet interface. This would essentially comprise software packages that support *qualitative data analysis*, i.e. the analysis of non-numeric information. It would be preferable that the tool and internet interface are a single package, i.e. a Knowledge-Base tool (back-end) with internet publishing (front-end) capability.

This activity has a number of sub activities.

Sub-Activity 1.1: Specification

The success of the Task as a whole will depend on the correct specification of the Knowledge- Base tool in the first instance.

The Operating Agent will work with Task Partners to draw up a clear specification of the requirements for the Knowledge-Base. These will be discussed at the project Kick Off meeting, to be held at Capenhurst, Chester, soon after project commencement.

Examples of criteria should include:

- Capable of handling different types of information input:
 - Questionnaires
 - Interview transcripts
 - Field notes
 - Video recordings
 - Audio recordings
 - Images
 - Documents (reports, meeting minutes, e-mails) in common formats (e.g. pdf, Microsoft Word, Excel, PowerPoint, etc)
 - Webpages
 - And so on...
- Capability to organise and classify data – both qualitative and quantitative data
- Easy to use information coding facility, providing user with ability to link themes, add notes and comments

- Provision of a search facility
- Provision of query and report generation to enable interrogation of information

As previously mentioned, it would be desirable for the Knowledge-Base to have an integrated web-publishing module, giving internet users:

- Access to raw information
- The ability to run and access pre-set queries and reports
- The ability to write and run bespoke queries

It is envisaged that the data input to the Knowledge-Base be provided in English, and the user interface and all reporting will be in English. However, the possibility of incorporating a multi-language user interface and/or a web-translation facility will be considered. As such, the proposed project costing does not include any allowance for translation of information into English.

The outcome of this Sub-Activity will be the production of a User-Requirement-Specification which will be taken to market to attract tenders for the provision of a suitable package (or packages) for the Task – see Subtask 1.2.

There are a number of potentially suitable systems available, some of which are listed here:

- | | |
|--|---|
| <ul style="list-style-type: none"> • <i>Free / open source software</i> (would require a consultant/programmer to provide a bespoke solution) <ul style="list-style-type: none"> ○ Aquad ○ CATMA) ○ CAT ○ Compendium ○ ELAN ○ FreeQDA ○ libreQDA ○ RQD) ○ TAMS Analyze) | <ul style="list-style-type: none"> • Proprietary software (May need some modification to meet Task requirements) <ul style="list-style-type: none"> ○ ATLAS.ti ○ f4analyse ○ HyperRESEARCH ○ MAXQDA ○ NVivo ○ QDA Miner ○ Qiqqa ○ XSight ○ CAT ○ Saturate |
|--|---|

Sub-Activity 1.2: Produce Shortlist of Solutions

The Operating Agent shall research suitable Knowledge-Base solution providers and invite tenders for the provision of a package (or packages) that meet the user-requirement-specification developed in Sub-Activity 1.1.

Tenders will then be evaluated against the user-requirement-specification and against value-for-money and other criteria (to be decided).

The Operating Agent shall produce a shortlist of no more than three (3) solution providers.

Sub-Activity 1.3: Check Inter-operability with IEA-DSM and DSM University Websites

The Operating Agent shall communicate with the web-masters of both the IEA-DSM website and DSM University website – to ensure that the shortlisted Knowledge-Base solutions are compatible with these websites (at the very least, ensuring that users of each of these websites can seamlessly access the Knowledge-Base using their respective login-credentials).

However, this is not considered to represent the over-riding selection criteria for the Knowledge-Base, but rather be used as a potential differentiator if all other selection criteria are equal.

Sub-Activity 1.4: Final Selection of Knowledge-Base solution

The Operating Agent shall make a final selection of the Knowledge-Base solution provider and place necessary orders to proceed with any necessary customisation works required to meet the needs of the Task.

Sub-Activity 1.5: Operating Agent Training

One vital part of the Knowledge-Base solution will be provision of training for the Operating Agent, and any Task Partner who wishes, in the use and management of the selected package (or packages). The Operating Agent will obtain sufficient training to be able to develop a User Guide for Task Partners and to cascade the training to enable Task Partners to fulfil their part in the Task in the future (i.e. updating of theme information (see Sub-Activity 1.6)).

Sub-Activity 1.6: Development of User Guide

During the input and collation of the information gathered for the first research theme, the Operating Agent will be responsible for developing a Knowledge-Base User Guide for the

Task Partners. This User Guide shall be completed when the standard queries/reports have been developed, in time for the Knowledge-Base beta launch (Sub-Activity 1.7).

However, it is intended that the User Guide be a live document that is continually updated as the Task progresses to the end of the second year. It will be updated by the Operating Agent as and when necessary in order to incorporate user comments and queries and the development of the Knowledge-Base.

Sub-Activity 1.7: Launch of Knowledge-Base beta version

Once the first theme has been researched and the information/data collated by the Operating Agent using the Knowledge-Base tool (Sub-Activity 2.4), a beta version of the Knowledge-Base shall be published on the internet for the exclusive use of the Task Partners.

At this stage, this will be a stand-alone version, with no interface with either of the target websites of the IEADSM or the DSM University. Its purposes will be to allow the Task Partners to review the internet based user interface, standard queries/reports, query-engine and so on (see Sub-Activity 2.6)

Sub-Activity 1.8: Task Partner Training

The Operating Agent shall hold a webinar type event to deliver sufficient training to the Task Partners to enable them to use and review the Knowledge-Base beta version when it is launched.

These activities are summarised in Table 4.1.

Table 4.1 Activity 1

Element	Element undertaken by:	Funding
Sub-Activity 1.1 & 2.1 Development of requirements specification. To include a Kick Off meeting to discuss Knowledge Base outline specification development and selection of first theme – see sub-activity 2.1.	Organised by Operating Agent ⁽ⁱ⁾ , attended by all Participants	Cost Share and Task Share
Sub-Activities 1.2 to 1.4 Selection and development of Knowledge-Base tools	Operating Agent & selected vendor	Cost Share
Sub-Activity 1.5 to 1.7 Operating Agent Training, User Guide development and Knowledge-Base beta launch	Operating Agent & selected vendor	Cost Share
Sub-Activity 1.8 Task Partner Training	Operating Agent and all Task Partners (video conference/webinar)	Cost Share and Task Share

(i) hosted by Operating Agent

Outputs to include:

- Knowledge-Base beta version
- Task Partner Training in use of Knowledge-Base
- Knowledge-Base User Guide
- Integration of Knowledge Base with IEADSM and DSM University websites

Activity 2: First Theme Research

The purpose of this activity is to select a Demand Side Response theme for a pilot. Once the theme is selected, the next step is to develop the information gathering protocols for the National Experts to use when collecting the raw information that will be fed into the Knowledge Base.

It will be the responsibility of the Operating Agent to collate the information provided by the National Experts using the Knowledge-Base tools selected and developed in Activity 1).

The Operating Agent will produce a set of standard queries and reports that users of the Knowledge base can access easily. Task Partners will be required to review the Knowledge-Base beta version and assist the Operating Agent to improve the Knowledge Base beta version

This activity has a number of sub activities as described below.

Sub-Activity 2.1: Selection of First Theme

The first Demand Side Management theme to be researched and entered into the Knowledge-Base will be agreed between the Operating Agents and the National Experts at the project Kick-Off meeting. Every effort will be made to obtain agreement from all the Task Partners on the chosen theme. If this is not possible, the options will be put to a vote using the same voting rules as applied at Executive Committee meetings.

Examples of themes include:

- Approach to regulation, and how this impacts on the opportunities for DSM;
- Stimuli for the development of DSM technologies and business models;
- Expected new loads (e.g. electric vehicles, heat pumps) and their impact on the energy system;
- Energy efficiency obligations on utilities;
- Overview of relevant market developments / relevant stakeholder developments; and
- Behavioural interventions to promote DSM Smart grid integration
- Evaluating DSM interventions beyond kWh estimates

Sub-Activity 2.2: Development of Information Gathering Protocols

The Operating Agent shall then develop protocols for information gathering that the Task Participants shall use to gather information for the Knowledge Base.

These may include:

- Questionnaires
- Checklists of types of information required (e.g. policy statements, legislation, case studies, project reports and so on)
- Specifications for information to be transferred (e.g. the types of information that the Knowledge-Base can assimilate)

Sub-Activity 2.3: Information Gathering

The Task Partners shall then research the chosen theme in their country, using the agreed research protocols.

While primary information may be submitted in a Task Participant's native language, all information gathered must be translated into English at the Task Participant's cost.

Sub-Activity 2.4: Collation of Information

The Operating Agent shall then gather all information from the Task Participants and enter it into the Knowledge-Base – at the same time using the Knowledge-Base tools to identify and collate the information so that it can be interrogated and researched by users.

This process will involve “tagging” keywords, information, practices and concepts and the creation of “meta-data” that will allow research into and comparison of the information provided by the Task Participants. The selection of an appropriate Knowledge-Base tool in Activity 1 will ensure this task possible.

Sub-Activity 2.5: Development of Standard Queries/Reports

As the Task Participant's information is collated, the Operating Agent will ask National Experts to submit key questions/queries that they would like answered by the Knowledge-Base beta version. The Operating Agent shall use these as a guide to developing a suite of standard queries and reports for the first theme pilot.

Sub-Activity 2.6: Review of Knowledge Base beta version

Once these are prepared, the Task Participants will be asked to review and comment on these standard queries/reports and thus assist the Operating Agent to improve them.

Table 4.2 Activity 2

Element	Element undertaken by:	Funding
Activity 2.1 Kick off meeting for first Theme selection (and Knowledge Base outline specification development Activity 1.1)	Organised by Operating Agent ⁽ⁱ⁾ , attended by all Participants	Cost Share and Task Share
Activity 2.2 Development of information gathering protocols	Operating Agent	Cost share
Activity 2.3 Gathering of Information	Task Participants	Task Share
Activities 2.4 and 2.5 Collation of information and creation of standard queries/reports	Operating Agent	Cost Share
Activity 2.6 Review of Knowledge-Base beta	Operating Agent & Task Participants	Cost Share and Task Share

Outputs to include:

- By the end of the first year of the Task a beta version of the Knowledge-Base will have been launched
- This beta version will contain the information gathered in the first Theme

Activity 3: First Year Report

The Operating Agent shall produce a report at the end of the first year to summarise the first year's activity and to review the Task Plan for the second year of operation.

This will be presented to the IEA DSM Executive Committee.

The Operating Agent shall also convene a Task Participant meeting (venue to be agreed by Task Participants) to present the First Year Report and plan for the second year of the task.

Table 4.3 Activity 3

Element	Element undertaken by:	Funding
First Year Report	Operating Agent	Shared Cost
Meeting to present report and plan second year of Task	Operating Agent and Task Participants	Cost share and task share

Outputs to include:

- Report on first year of Task
- Review of plan for Task in second year

Activity 4: Second Theme

This activity is a repeat of the sub-activities undertaken to research the first theme (2.1 – 2.6), but over a shorter, six month period:

Sub-Activity 4.1: Selection of Second Theme

At the meeting to review the first year of the Task, time will be taken to get agreement of all Task Partners on the second Demand Side Management theme to be researched and entered into the Knowledge-Base.

Sub-Activity 4.2: Development of Information Gathering Protocols

The Operating Agent shall then build on the learning of the first Theme research activity to improve the protocols for information gathering that the Task Participants shall use to gather information for the Knowledge Base.

Sub-Activity 4.3: Information Gathering

The Task Partners shall then research the chosen theme in their country, using the agreed research protocols.

While primary information may be submitted in a Task Participant's native language, all information gathered must be translated into English at the Task Participant's cost as well.

Sub-Activity 4.4: Collation of Information

The Operating Agent shall then gather all information from the Task Participants and enter it into the Knowledge-Base – using the Knowledge-Base tools to identify and collate the information so that it can be interrogated and researched by users.

Sub-Activity 4.5: Development of Standard Queries/Reports

As the Task Participant's information is collated, the Operating Agent will again ask Task Participants to submit key questions/queries that they would like answered by the Knowledge-Base beta version. The Operating Agent shall use these as a guide to improving the suite of standard queries and reports developed for the first theme pilot.

Sub-Activity 4.6: On-going review of Knowledge-Base

Task Participants will be expected to review and comment on these standard queries/reports on an on-going basis to assist the Operating Agent to improve them further.

Table 4.4 Activity 4

Element	Element undertaken by:	Funding
First Year Review and Second Theme selection (venue TBC)	Organised by Operating Agent attended by all Participants	Cost Share and Task Share
Development of information gathering protocols (4.2)	Operating Agent	Cost share
Gathering of Information (4.3)	Task Participants	Task Share
Collation of information and creation of standard queries/reports (4.4 – 5)	Operating Agent	Cost Share
Review of Knowledge-Base beta	Operating Agent & Task Participants	Cost Share and Task Share

Outputs to include:

- By the end of this activity the beta version of the Knowledge-Base will have two research themes information.

Activity 5: Third Theme

This activity is a repeat of the sub-activities undertaken to research the first and second themes, over a shorter, four month period:

Sub-Activity 5.1: Selection of Third Theme

A telephone/video conference shall be held to get agreement of all Task Partners on the third Demand Side Management theme to be researched and entered into the Knowledge-Base.

Sub-Activity 5.2: Development of Information Gathering Protocols

The Operating Agent shall then build on the learning of the first and second Theme research activities to improve the protocols for information gathering that the Task Participants shall use to gather information for the Knowledge Base.

Sub-Activity 5.3: Information Gathering

The Task Partners shall then research the chosen theme in their country, using the agreed research protocols.

While primary information may be submitted in a Task Participant's native language, all information gathered must be translated into English at the Task Participant's cost as well.

Sub-Activity 5.4: Collation of Information

The Operating Agent shall then gather all information from the Task Participants and enter it into the Knowledge-Base – using the Knowledge-Base tools to identify and collate the information so that it can be interrogated and researched by users.

Sub-Activity 5.5: Development of Standard Queries/Reports

As the Task Participant's information is collated, the Operating Agent will again ask Task Participants to submit key questions/queries that they would like answered by the Knowledge-Base beta version. The Operating Agent shall use these as a guide to improving the suite of standard queries and reports developed for the first theme pilot.

At this stage it is anticipated that cross-theme queries can be developed, that will allow users to interrogate the full breath of information in the Knowledge-Base. This is where use of the Knowledge-Base Query Engine can be used by Task Participants to generate bespoke

queries/reports. The Operating Agent will provide training and support to Task Participants in the use of the Knowledge-Base Query Engine.

Sub-Activity 5.6: Review of Knowledge-Base beta

With three Theme’s information in the Knowledge-Base the Task Participants will be asked to conduct a final review the progress of the development of the Knowledge-Base. They will be asked to take a view on whether the Knowledge-Base is ready for publication to all IEA members through the IEA website and or the DSM University.

Table 4.5 Activity 5

Element	Element undertaken by:	Funding
Third Theme selection (Telephone/Video Conference)	Organised by Operating Agent/attended by all Participants	Cost Share and Task Share
Development of information gathering protocols (5.2)	Operating Agent	Cost share
Gathering of Information (5.3)	Task Participants	Task Share
Collation of information and creation of standard queries/reports (5.4 – 5)	Operating Agent	Cost Share
Review of Knowledge-Base beta	Operating Agent & Task Participants	Cost Share and Task Share

Outputs to include:

- By the end of this activity the beta version of the Knowledge-Base will have three research themes information; and
- A decision will be made as to launching the Knowledge-Base on the IEADSM website and the DSM University website.

Activity 6: Launch of Knowledge Base

This activity is dependent on the Task Participants agreeing to the launch of the Knowledge-Base on the IEADSM website and the DSM University website.

The Activity is split into a number of sub activities as described below.

Sub-Activity 6.1: Task Partners Approve Knowledge-Base for Publication

Following the completion of Activity 5, the third DSM research theme activities, the Task Partners will be consulted as to whether the Knowledge-Base should be published on the IEA DSM website only or on this website and the DSM University website.

Sub-Activity 6.1: Launch Knowledge Base on IEADSM website

The Operating Agent shall work with the IEA DSM website administrator to publish the Knowledge-Base in a password-secured section of their website.

Sub-Activity 6.2: Testing of Knowledge-Base on IEADSM website

The Operating Agent and Task Participants shall then test the Knowledge-Base as published on the IEA DSM website to ensure all functionality works properly.

Once this testing is complete, all IEA DSM Task Participants shall be given access to the Knowledge-Base and provided with access to the User Guide.

Sub-Activity 6.3: Launch Knowledge-Base on DSM University website

It is also envisaged that the Knowledge-Base be launched on the DSM University web-site.

It is envisage that this would be undertaken once it has been launched on the IEA DSM website to ensure that the lessons learnt will ensure as smooth a migration as possible.

Table 4.6 Activity 6

Element	Element undertaken by:	Funding
Activity 6.1 Launch Knowledge-Base on IEADSM website	Operating Agent and IEA DSM website administrator	Cost Share
Activity 6.2 Test Knowledge-Base on IEADSM website	Operating Agent, Task Participants and IEA DSM website administrator	Cost share and task share
Activity 6.3 Launch Knowledge-Base on DSM University website	Operating Agent and DSM University website administrator	Cost Share

Outputs to include:

- Launch of Knowledge-Base on IEADSM and (optionally) DSM University websites.

Activity 7: Year 2 Reporting

A final activity in this Task by the Operating Agent shall be to produce a report reviewing the progress over the two years of the Task and to make recommendations as to extension of the Task to widen the information held in the Knowledge-Base.

To this end the Operating Agent shall convene a final meeting of the Task Participants to review project progress, a draft report and to develop recommendations as to the extension of the Task.

Table 4.7 Activity 7

Element	Element undertaken by:	Funding
Develop final Task report	Operating Agent	Cost Share
Close out Meeting	Operating Agent and Task Participants	Cost share and task share

Outputs to include:

- Final Task Report
- Recommendations regarding extension of the Task

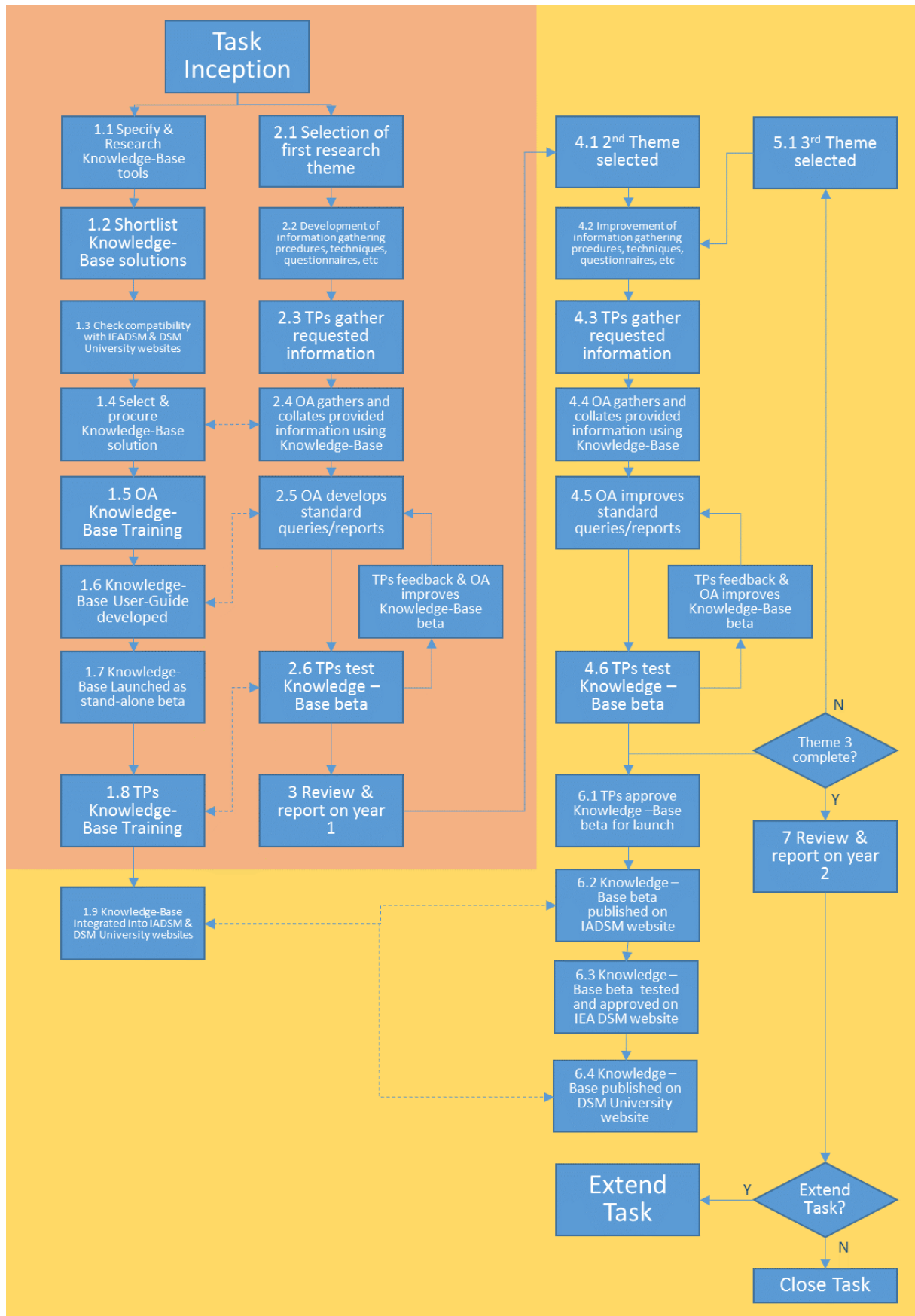


Figure 2. Detailed Project Plan

Deliverables

The principal deliverables associated with the new Task are the Knowledge-Base and two reports

The Knowledge –Base will be populated with information relating to the selected three DSM themes as provided by the Task Participants. It will provide:

- Access to raw information
- Standard queries and reports
- A query engine to allow users to develop their own interrogation of the Knowledge Base

The Knowledge-Base will, as a minimum, be published on the IEADSM website and available to all IEADSM Participants. It could also be published on the DSM University website as a resource for students and others interested in DSM.

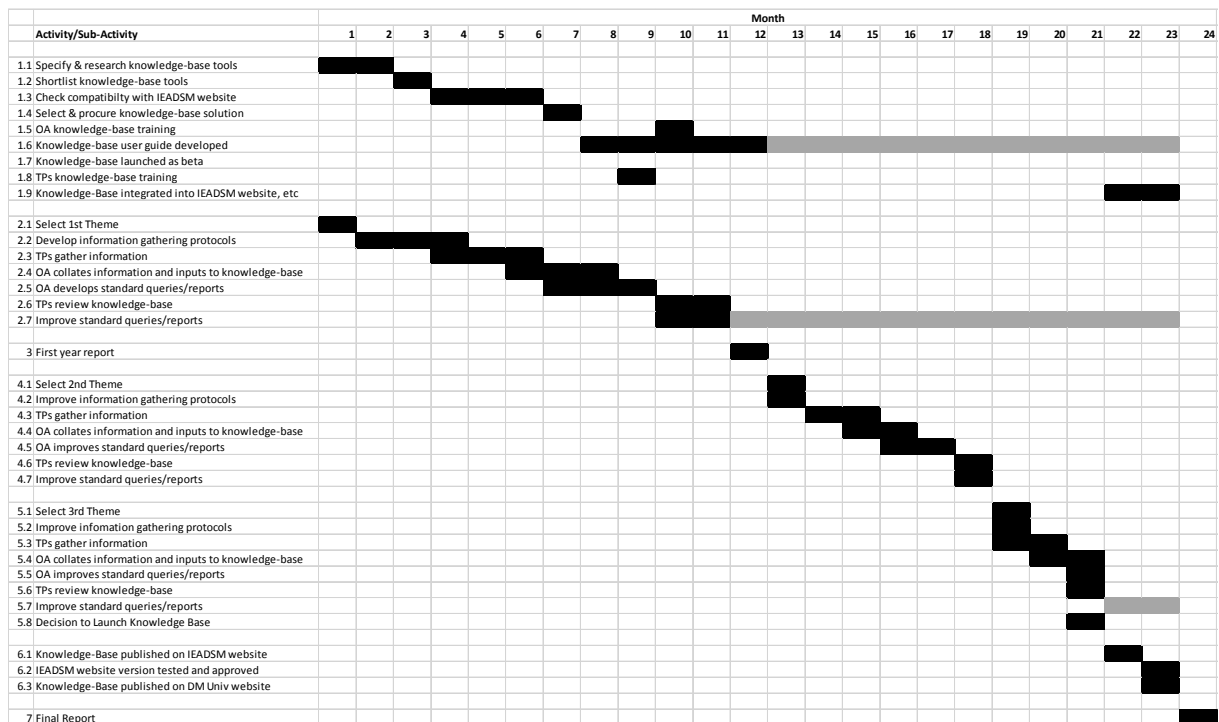
The first report will provide a review of the Knowledge-Base development and first research theme pilot.

The second report will provide a review of the two year project and will make recommendations regarding the future of the Knowledge-Base and extension of the Task.

5 Work Schedule

The Task will be implemented over a two year time period, commencing at such time as participants are able to commit to the Task.

The programme-of-work, activities and meetings within the sub-task shall be performed in accordance with the Gantt chart shown below.



6 Rights and Obligations

The principal results and outputs from the new Task will remain confidential to the Participants until such time as the Knowledge-Base is published on the IEADSM website.

The Task will also be required to produce an executive overview report of its activities, not containing any sensitive information or data, and which is suitable for publication in the public domain.

Although the programme-of-work, as described herein, is not anticipated to lead to the development of any new Intellectual Property (IP), the ownership and commercial exploitation of any IP which may be produced shall be established by the unanimous vote of the Demand Side Management Executive Committee, consistent with the IEA Demand Side Management Implementing Agreement.

Obligations on the Operating Agent

The Task Operating Agent will be responsible for the overall management and delivery of the work programme and will work closely with the individual Participants, such as to ensure the effective and expedient delivery of its objectives. It will discharge its duties via the organisation and delivery of a programme of Experts' Meetings and via specific further activities, as may be required. The Operating Agent will submit regular six monthly reports to the Demand Side Management ExCo and will implement the decisions of the Demand Side Management ExCo.

The Operating Agent will be specifically responsible for:

- Ensuring an agreed information gathering protocol for each participating country is supplied to the National Experts.
- Actively engaging with the network of National Experts, by means of the programme of Experts' Meetings described above and via supplementary one to one dialogue, in order to elicit the necessary information required for the satisfactory completion of the Task; and
- The production of the Task deliverables, as described in section 4 above.

Obligations on the Participating Countries

Each participating country within the Task shall be required to nominate a National Expert (or otherwise known as “Expert”). Experts will be expected to have a good working knowledge of Smart Grids, Smart Meters and Demand Side Management.

Each National Expert will be required to:-

- Provide the Operating Agent with a National Participation Letter, indicating their commitment to the Task. The collective set of National Participation Letters will represent the National Participation Plan;
- Attend and participate in the programme of Experts’ Meetings, to be organised by the Operating Agent in the discharge of its obligations;
- Support the Operating Agent in the discharge of its obligations via the timely and appropriate provision of information, data and other material, as may reasonably be required to service the requirements of the programme-of-work, as described in Section 4 above; and
- Take the lead responsibility on an individual national basis for the dissemination of the outputs from the Task.

7 Budgets

The performance of the new Task will require a combination of financial and in-kind contributions, as described below.

7.1 Operating Agent and Research Costs (GBP, £)

The project will be completed by the Operating Agent, and the selected Knowledge-Base vendor (acting as a sub-contractor to the Operating Agent). The breakdown of the Operating Agent's budget is as shown in Table 7.1 below. These costs are based on ten participating countries.

**Table 7.1: Operating Agent Budgetary Breakdown
(based on ten participating countries)**

Activity		Manpower (£)	T&S (£)	Software (£)	Totals (£)
1	<i>Procurement of Suitable Knowledge-Base Tool & Internet Interface</i>	44,690		40,000*	84,690
2	<i>First theme</i>	24,960			24,960
3	<i>First year reporting & meeting</i>	9,040	2,000		11,040
4	<i>Second theme</i>	23,570			23,570
5	<i>Third theme</i>	21,850			21,850
6	<i>Launch</i>	6,840			6,840
7	<i>Second year reporting</i>	5,210			5,210
	<i>ExCo Reporting</i>	12,680	8,000		20,680
	Totals:	148,840	10,000	40,000	198,840

The budget outlined above assumes participation in the sub-task by ten countries.

*The costs shown above include an allowance of £40,000 for the procurement of the Knowledge-Base tool. This is an estimate based on EA Technology experience, and is believed to represent the cost of purchasing a tool and allowing for any customisation required for the purposes of this Task. If the actual costs of procurement are significantly lower, the difference between the estimated cost and actual software cost will be refunded to participants in the form of a rebate against future year’s membership fees. If the costs are significantly higher, the Operating Agent reserves the right to adjust the project budget, for example by revising the scope of activities undertaken in Year 2. This will be agreed with the participating countries during the progression of Activity 1 – the purchase shall not be made without the Task Participant’s agreement.

The cost on a per participant basis, assuming 10 participating countries is shown in Table 7.2 below.

Table 7.2: Cost per Participant

Total Cost (£)	Number of Participants	Total Cost per Participant	Year 1 (Set-up costs + first theme)	Year 2 (second and third themes)
198,840	10	£19,884	£12,069	£7,815

If a Participant decides to join the Task once work has commenced, the Operating Agent reserves the right to revisit the costing shown above. If necessary, the total costing will be adjusted to reflect any additional administrative or project management costs associated with incorporating the additional Participant. These revised costs will be agreed with existing Participants.

The budget includes manpower, travel and subsistence allowance for the Operating Agent to attend four Executive Committee meetings for the presentation of the Task Status Reports during Year 1 and Year 2.

7.2 Task Participants

The Task Participants will be expected to support National Expert participation at a minimum level of 6 person-weeks per participating country, over the 24 months of the Task. Multiple Experts may be assigned, as appropriate.

All Participants will be required to provide National Expert representation and contribution to the Experts' meetings. In order to keep the project costs to a minimum, it is proposed that the majority of Task meetings be conducted via teleconferences / webinar events. There will be two face to face meetings that Experts are required to attend. The first is the project inception meeting, to be held at Chester upon project commencement of the Task. The second will be an end of Year One review and Year two planning meeting, to be held at a venue agreed by the Task Participants

Travel and subsistence costs for these meetings shall be the responsibility of the Task Participants.

7.3 Budgetary Overview

Table 7.3 below provides a budgetary overview of the contributions required from the Task Participants, for the delivery of the new sub-task, based on four participating countries. In the event of a differing number of Participants, the financial contribution will change according to Table 7.2, whilst the National Expert Contribution will remain the same. The sub-task requires a minimum of five countries to commence.

Table 7.3: Summary of Financial and National Expert Contributions Required per Task Participant (based on four countries participating)

Role/Activity	Financial/manpower provision
Operating Agency	£198,840
National Expert Contribution	6 person weeks Plus expenses

8 Operating Agent

EA Technology is well placed to undertake the role of Operating Agent for this new Task. EA Technology has been actively involved within the IEA Implementing Agreement on Demand Side Technologies and Programmes since its inception in 1993. During this time, EA Technology has successfully managed and delivered four major programmes of work within the agreement.

- Task 2: Communications Technologies for Demand Side Management
- Task 8: Demand Side Bidding in a Competitive Electricity Market
- Task 11: Time of Use Pricing and Energy End Use for Demand Management Delivery
- Task 19: Micro Demand Response and Energy Saving
- Task 23: The role of the Demand Side in Delivering Effective Smart Grids

It is proposed that the role of Operating Agent be fulfilled by Linda Hull, a Senior Consultant at EA Technology. Linda brings to the project substantial management experience, complemented by her respected and wide ranging knowledge of Demand Side Management, electricity markets, regulation, techno-economic evaluation, electricity trading arrangements, smart metering applications and the role of smart appliances. Linda Hull has previously fulfilled the role of Operating Agent for Task 8, 19 and 23.

Linda Hull will pro-actively manage and co-ordinate the EA Technology project team, both internally and with the Task Experts, and act as the primary contact point for the IEA Demand Side Management Executive Committee. The Project Manager's responsibilities are principally to achieve the project objectives and deliver the project outputs, to a high level of client satisfaction, within the timeframe allocated and within the agreed budget. In addition, a Project Director will be assigned to the project. The role of the Project Director is to manage a portfolio of projects within EA Technology, of which this will be one. Issues which cannot be dealt with within the Project by the Project Manager, such as the impact of external factors or unexpected resourcing issues will be escalated to the Project Director.

AGENDA 4a. (43rd meeting of the IEA DSM Programme)

DOCUMENT G

Final Management Report

Executive Summary

March 2014

Prepared by: Harry Vreuls, Netherlands Enterprise Agency

This Executive Summary is submitted to the DSM IA ExCo meeting in Wellington with a request to:

- Approve the Executive Summary and the Final Management Report which will be presented at the ExCo meeting

Final Management Report Task 21 Harmonisation of Energy Savings Calculations; Executive Summary

This international cooperative project on harmonisation of energy savings calculations was initiated in April 2009 and was completed in April 2014. Seven countries (France, Republic of Korea, The Netherlands, Norway, Spain, Switzerland and the USA) participated in this Task. Harry Vreuls of NL Agency for Energy and Climate – that merged by 1st January 2014 into the Netherlands Enterprises Agency RVO.nl - served as Operating Agent.

Three primary objectives for the Task are to:

- Summarize and compare the current methods and standards used for determining energy use, energy demand and energy and emissions savings from energy efficiency actions and policies;
- Identify the organizations that are and could be responsible for use and maintenance of such methods and standards; and
- Recommendations how existing methods, standards and resources can be expanded and/or used for comparing different countries and international efficiency policies and actions.

The main outputs are the country reports, the template to document energy savings calculations and related GHG emission reduction, the report Harmonised Energy Savings Calculations for selected end-use technologies, key elements and practical formulas, the report Guidelines for Harmonised Energy Savings Calculations, and the report Roadmaps for improved Harmonised Energy Savings Calculations. Additional papers were presented at international conferences, articles in the IEA DSM Spotlight and Task leaflets.

The **country reports** “Energy Savings Calculations for selected end-use technologies and existing evaluation practices in [country]” hold case applications for energy savings and greenhouse gas reduction dealing with: lighting in households and commercial buildings; wall and window insulation; air condition system; high efficient electric motors and variable speed drives; eat pumps in households. Additional the following DR programmes are included: France: Tempo Tariff, Critical Peak Pricing; Italy: Interruptible and load shedding Programmes; Norway: Remote Load Control; Spain: Interruptible service; USA: State-wide Pricing Pilot Program in California.

Based on experts meetings, testing, a workshop and discussions with experts during the project, **a template was generated to document energy savings calculations and related GHG emission reduction**, as well as the relation with demand response impact. This template was used to collect information in six countries for six technologies.

The report “**Harmonised Energy Savings Calculations for selected end-use technologies, key elements and practical formulas**” summarises the experiences we have gained with using the template during the project. For the selected technologies – variable speed drive and high efficient motors, heat pumps, heating systems in commercial buildings, air conditioning , residential insulation and lighting – the key elements are presented for each of the country’s case application. These key elements include the formula and its parameters in the baseline issues, application of normalisation and/or corrections and life time savings. The greenhouse gas emission reductions for the case applications and relations with demand response savings are also presented. In addition the report presents the conclusions on harmonised formulas,

greenhouse gas reductions and demand response savings, as well as recommendations for further improvements.

The reports “**Guidelines for Harmonised Energy Savings Calculations**” holds the information on approaches for the six key elements in use by the participating countries and in general. In almost all sources several to all of the key elements are included in ESC and it is concluded that the key terms holds common understanding and are use in practice. Baselines shown as the most critical common element. Unitary saving is still often a ‘new’ start point for savings and saving life-time is not a major topic, but when used, it is often treated in different ways. GHG emission reduction is often not included in reports on impacts from energy savings projects. There is a large number of definitions, often slightly different and mainly related to national circumstances and regulations. But common terminology is increasing by the work of the standardisation organisations CEN and ISO, interstate co-operation between US States and EU Directives.

The report “**Roadmaps for improved Harmonised Energy Savings Calculations**” contains an overview on the developments in recent years related to harmonisation of energy savings calculations in Europe, the USA and worldwide. In Europe the Energy Service Directive has stimulated common efforts: the EMEEES project providing detailed information on unitary energy savings and the European standardisation organisation CEN for lifetime of savings and a standard on energy savings calculations. The USA, in addition to the work in California, has increased regional co-operation by e.g. NEEP and SEE Action and the DOE (USA Department of Energy) Uniform Methods Projects are the driving force for more harmonisation. The International Standardisation Organisation (ISO) is preparing a global standard on energy savings calculations.

In Europe, it currently comprises more or less a time-out situation: CEN is waiting for new mandates and finances and the Energy Efficiency Directive (EED) will result in more understanding on future needs for energy savings calculations early 2013. In the USA the Uniform Methods Project in combination with more regional co-operations continues to produce more harmonisation. ISO is in the process of creating general standards on energy savings and energy savings calculations to be finalised by early 2014.

Task 21 produced several case applications for a number of countries and a template to document information on six key elements. This template contains a number of elements comparable to those suggested in USA reports.

Most of the information needed for the key information on energy savings calculation had to be generated by the experts using different sources and/or experts opinions. The country reports and the report on harmonised energy savings calculations are showing the availability and use of default values for case applications and illustrating the learning over time on energy savings calculation parameters.

The key elements for energy savings calculation are a practical stepwise approach. This stepwise approach in energy savings calculation makes more comparable reports on evaluation of energy savings.

Through discussions between experts it was possible to develop better guidance on using what type of base line and to when and how to update base line estimates.

In general the Task on harmonisation of energy savings calculation was well in time and could provide important input into the development of international standards, generate global agreement and understanding between experts on the key elements of energy savings and provided unique comparable information on energy savings calculations for a number of technologies in countries all over the world.

AGENDA 5a. (43rd meeting of the IEA DSM Programme)

ATTACHMENT C

Part 2 of the Pre-Meeting Document (PMD)

Task 17 – Task Status Report: Integration of DSM with other distributed energy resources

March 2014

Prepared by:

Matthias Stifter, AIT, Austria and Réne Kamphuis, TNO, the Netherlands

This Task Status Report for Task 17 is submitted to the DSM IA ExCo meeting in Wellington, New Zealand, with a request for the ExCo to:

- Vote on starting or dropping the Task. If the necessary number of countries is not reached the size of the Task will be decreased by 30k€.

AGENDA 5b. (43rd meeting of the IEA DSM Programme)

DOCUMENT H

Task 23

Task Status Report

Role of the Demand Side in Delivering

Effective Smart Grids

March 2014

Prepared by Linda Hull, EA Technology, United Kingdom
To be presented by Paul Blackmore, New Zealand

This Task Status Report is submitted to the ExCo meeting in Wellington with a request to:

- | |
|--|
| <ul style="list-style-type: none">• Approve the Task Status Report |
|--|

International Energy Agency

**IMPLEMENTING AGREEMENT ON TECHNOLOGIES
AND PROGRAMMES FOR DEMAND SIDE MANAGEMENT**

**Task 23
Role of the Demand Side in Delivering Effective
Smart Grids**

**Task Status Report
14 February 2014**

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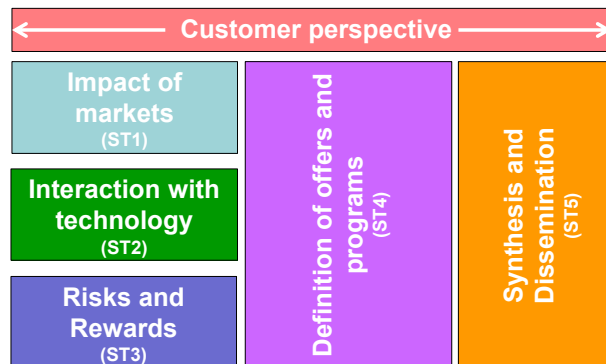
- 1. SUMMARY**
- 2. PROJECT WORKPLAN**
- 3. OBJECTIVES FOR THE LAST SIX MONTHS**
- 4. PROGRESS AGAINST OBJECTIVES**
- 5. WORK PLAN FOR THE NEXT SIX MONTHS**
- 6. FINANCE**
- 7. MATTERS FOR THE EXCO**

1. SUMMARY

Task 23 is exploring the potential risks and rewards associated with Smart Grids from the perspective of consumers. The project aims to draw together international experiences and examples of best practices in order to provide guidance to Smart Grid implementers on how to ensure the demand side contributes to the delivery of effective Smart Grids.

The Task was initiated at the 37th Executive Committee Meeting, held in Washing in April 2011, and work on the project commenced in June 2012. The countries participating in this Task are Netherlands, Norway, Republic of Korea, Sweden and UK.

Task 23 comprises five Subtasks, as highlighted below.



Sub-Task 1, 2 and 3 have been concluded, and Sub-Task 4 is due to be completed in the next month.

These Sub-Tasks have focussed on gathering experiences and knowledge about:

- How the external environment facilitates or presents barriers to the active participation of consumers in Smart Grid related activities;
- The experiences of consumers in existing Smart Grid related activities, both within the participating countries and elsewhere; and
- How risks and rewards are evaluated by consumers, and how they impact on the consumer decision making process.

The results of these Sub-Tasks demonstrate that:

- There are many factors that influence an individual's intention and behaviour. These factors include the individual beliefs and the social norms that influence them, as well as the external environment or context. Thus, two individuals presented with the same opportunity within the same context may behave differently due to their own personal views and beliefs. Similarly, two individuals with similar views and beliefs may behave differently due to the context.
- The results demonstrate the growing body of evidence that demonstrates that individuals do not make decisions that fit within a rational economic approach. That is, consumers do not make decisions based on whether or not the gains outweigh the losses.

2. PROJECT WORK PLAN

Task 23 comprises the following Subtasks:

(For a complete description of the scope of each Subtask and its associated activities, see the full Proposal within the Pre-Meeting Document for the 37th Executive Committee Meeting, held in Washington D.C., USA, April 2011)

Subtask 1 Impact of energy markets on the role of customers

There are many stakeholders in the energy market with different interactions with consumers and different responsibilities. This subtask would map the interactions of different stakeholders in a ‘market map’ for each participating country, with the consumer as the central focus. This could include power and information flows and responsibility (e.g. for billing and metering). Ownership of data may also be an important issue from the consumer perspective and so the current situation in each country will be shown on the map.

Outputs to include:

- Market map for each participating country
- Analysis of impact of different market structures on Smart Grid implementation from the perspective of customers

Subtask 2 Interaction between technology and customers

There a number of technologies associated with the Smart Grid concept including Smart Meters, electric vehicles, heat pumps, micro-generation and energy storage as well as the control and communications needed to actively manage end-use consumption. The way that customers use and relate to these technologies has a significant impact on their ability to contribute towards an effective Smart Grid.

This subtask will draw upon the available information on Smart Grid enabling technologies in order to consider the appropriateness of these technologies, both from the customer perspective and the Smart Grid industry perspective.

Outputs to include:

- Summary of experiences of customer interactions with Smart Grid technologies
- Analysis of TRLs and MRLs of selected technologies and the impact on Smart Grid deployment.

Subtask 3 Identification of Risks and Rewards associated with Smart Grids

This subtask will identify the possible risks and rewards relating to the Smart Grid concept from the consumer perspective. Each of these risks and rewards are influenced by a number of stakeholders for which the Smart Grid can meet specific needs and requirements.

Outputs to include:

- Map of risk and rewards from perspective of customers
- Report chapter (s) detailing risks and rewards from perspective of customers

Subtask 4 Defining offers and programmes (tools) to help ensure Smart Grids meet needs of customers

The effectiveness of the Smart Grid can be improved by engaging with the demand side. In order to engage with consumers and achieve their “buy-in”, the Smart Grid should provide

tangible benefits to customers themselves. This could include direct benefits associated with Smart Grid deployment, or additional functionality or services which represent “added value” to the consumer.

This subtask will draw upon the work that has already been undertaken in this area, and will focus on highlighting the costs and benefits associated with different approaches that have been adopted. For example, the benefits of mandating vs. the ability to opt-in to a program will be considered, and the trade off between the level of functionality included within smart meters as standards against the risks and rewards for customers.

Outputs to include:

- **Overview of Smart Grid experiences from the perspective of customers**
- **Best practice approaches**
- **Report chapter(s) identifying tools to ensure Smart Grids meet needs of customers**

Subtask 5 Helping customers to actively engage with Smart Grids – Synthesis and Dissemination of Findings

The main objective of this activity is to understand how the findings of subtasks 1 to 4 come together, and disseminate the results via a series of regional workshops organised and delivered by the Task participants. Thus, this subtask will identify the key issues that impact on the way customers interact and view Smart Grids. This will include the impact of market structure, the role of technology, the ability for customers to realise any potential rewards whilst minimising the risks, and the effective deployment of tools and measures indentified in subtask 5. Thus this subtask will focus on the factors that need to be addressed in order to ensure Smart Grids are able to achieve their full potential by ensuring that all industry stakeholders, including customers, benefit from their deployment. This subtask would include an industry workshop, to which a wider group of cross-industry stakeholders could be invited to discuss the results and findings of the Task.

Outputs to include:

- **Cross-sector workshops (to be delivered by the National Experts)**
- **Workshop proceedings**
- **Final report (Executive summary)**

3. OBJECTIVES FOR THE LAST SIX MONTHS

At the 42nd ExCo in Rigi, the Operating Agent requested a three month project extension. However, in order to reflect the time constraints over the Christmas and New Year, the ExCo elected to grant the Operating Agent a six month extension, i.e. to May 2014.

The tasks to be completed were Sub-task 4 and Sub-Task 5. Progress against these tasks is described in Section 4 below.

4. PROGRESS AGAINST OBJECTIVES

Although every effort has been made to keep to the original 3 month extension, the progress made on the Sub-task 4 report has been slightly slower than had been expected, confirming the wisdom of the ExCo's decision. As a result, it is now expected that the project will now be completed by the end of May 2014.

Experts meetings

To date, all four of the planned Experts Meetings have now been organised and delivered. These are summarised below:

Date	Location	Total Attendees			Industry	Academic
		Total	National Experts	Government		
25 th & 26 th June 2012	Chester, UK	9	4	1	8	0
9 th to 11 th October 2012	Oxford, UK	8	5	1	7	0
4 th & 5 th July 2013	Steinkjer, Norway	6	3	1	5	0
8 th & 9 th October 2013	Seoul, Korea	5	4	1	4	0

The main purpose of the Experts Meetings was to provide the opportunity for the nominated National Experts to agree the detailed scope of work to be undertaken in order to ensure that the overall aims and objectives of the project would be delivered. They also provided the opportunity to ensure that the National Experts could present an overview of the findings of their Task Share elements.

These meetings were very effective, and provided a clear steer to the Operating Agent on how best to proceed on certain elements of the project. However, it is important to note, that not all of the National Experts were present at these meeting. In order to minimise the risks that the project did not align to country expectations, the decisions and actions from the meetings were documented and distributed to all the Experts. All Experts were provided with ample opportunity to comment on the actions and decisions, and were invited to provide their own individual feedback.

In addition to these ‘face-to-face’ meetings, a number of web-meetings have been organised over the course of the project to discuss progress with the National Experts meetings. These were organised on an ad-hoc basis as and when necessary.

Sub-Task 4

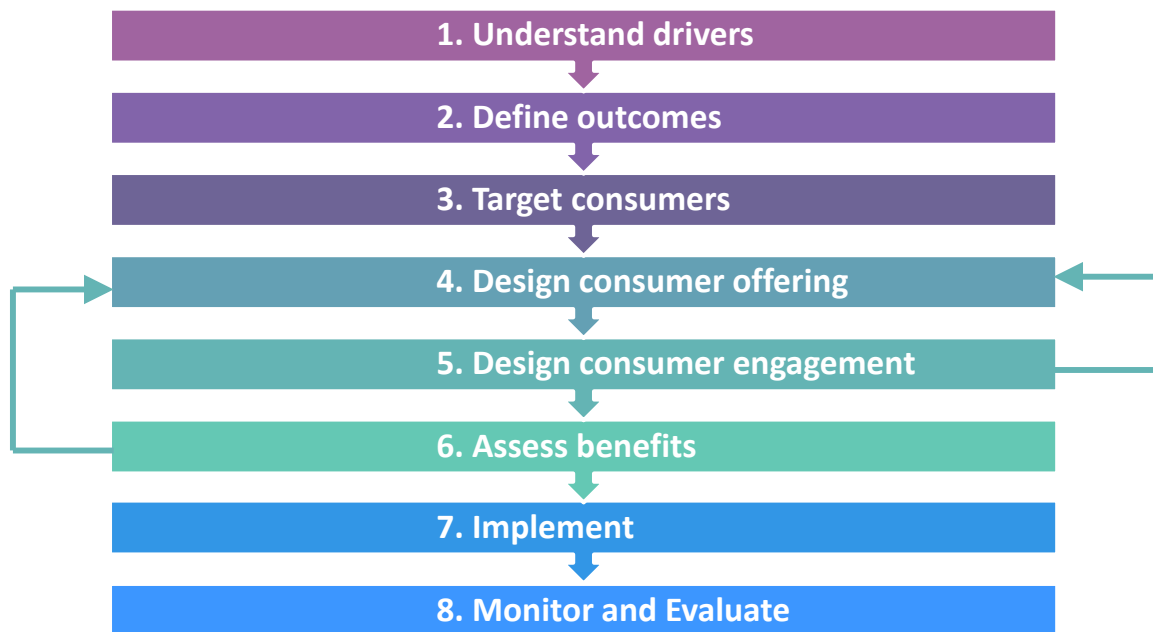
Sub-Task 4 aims to bring together the learning points from Subtasks 1 to 3, to ensure that Smart Grids provide tangible benefits to customers themselves. This could include direct benefits associated with Smart Grid deployment, or additional functionality or services which represent “added value” to the consumer.

This Subtask comprises two main activities

- Examples of best practice identified in Subtask 2, will be combined with information from Subtask 1 and 3 to define tools and measures to ensure Smart Grids provide benefits to consumers.
- Consideration of the interrelationship between customer needs and stakeholder needs in order to demonstrate where the benefits of Smart Grids reside. This will be the platform by which the potential impact of the tools/measures on Smart Grids will be quantified.

These activities are currently being combined to produce a single report that draws upon the findings from Sub-Tasks 1 to 3. The report will be written in the form of a guidance document for implementers of Smart Grid related activities that require action from consumers, particularly domestic and smaller businesses. It aims to provide guidance on how Smart Grid initiatives should be designed in order to make them more attractive to consumers; it is not intended to provide a description of Smart Grid related initiatives that are considered to be attractive to consumers. Instead, it is intended to provide guidance on some of the key criteria that need to be considered when designing Smart Grid initiatives that endeavour to change energy consumption through energy efficiency, load shifting or information sharing.

The guidance document has been prepared in the form of a ‘step-by-step’ guide that assesses each of the areas that need to be considered and the key factors relating to each area. The steps are highlighted below.



Each step identifies the different aspects of Smart Grid implementation that impact on consumer engagement. Work is progressing well on the collation of the results from Sub-Tasks 1, 2 and 3 to form the basis of the guidance provided. In addition, some additional new research has been identified to support the findings to date.

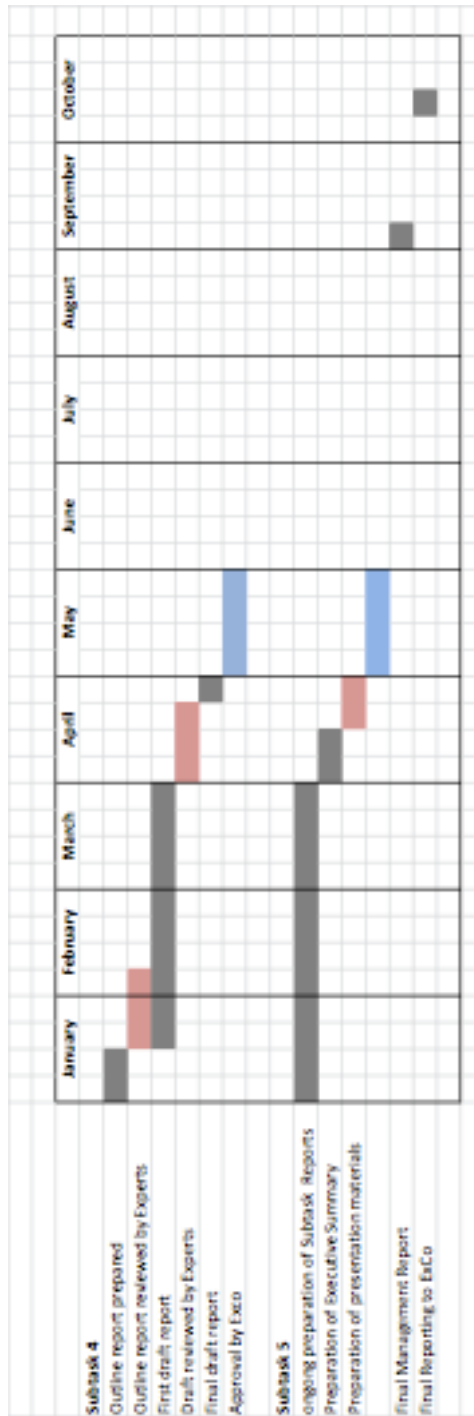
The guidance document will also provide a methodology for assessing the benefits of Smart Grids from the perspective of consumers – Step 6 above. This will comprise a methodology that implementers can use to assess the benefits of a specific Smart Grid initiative within a specific context –i.e. a tool that can form part of the implementers tool box for Smart Grids. The report will provide simple examples to show how the tool can be used.

Subtask 5

The purpose of Subtask 5 is to ensure that the results are disseminated effectively. Individual Subtask reports have been produced on an on-going basis during the project, and these form the main outputs of this task, together with the main guidance document currently being produced in Sub-Task 4. However, it is recognised that the Subtask reports are very detailed and not ideally suited for policy makers. Therefore, a shorter policy document will also be produced at the end of the project highlighting the key results and highlighting the key recommendations for policy makers and key industry stakeholders. A supporting power point presentation will also be produced for use by the National Experts when disseminating the results of the Task within their own country. This will be done once the Sub-Task 4 report has been completed.

5. WORKPLAN FOR THE NEXT SIX MONTHS

The timetable for completion of Task 23 is as follows:



6. FINANCE

The budget for Task 23 is set at £279,220 based upon five participating countries. Thus, the financial contribution per Participant will be £55,844 (based upon five Participants).

In the event of more than five Participants, the financial contribution per Participant will be based on the total Operating Agent's budget of £279,220, divided pro-rata by the number of Participants.

In the event of less than five Participants, the individual Participant financial contributions shall be maintained at £55,844 per Participant and a reduced programme-of-work shall be agreed accordingly, subject only to a minimum of four Participants supporting the Task.

If a Participant decides to join the Task once work has commenced, the Operating Agent reserves the right to revisit the costing shown above. If necessary, the total costing will be adjusted to reflect any additional administrative or project management costs associated with incorporating the additional Participant. These revised costs will be agreed with existing Participants. It is not anticipated that any new participants will join the project at this time.

To date, payments have been received from all five participating countries, as stipulated in each participant's letter of engagement.

Expenditure is in line with expected for project status.

7. MATTERS FOR THE EXCO

- Approval of the Task Status Report

TASK 23

Task 23 – The Role of the Demand Side in Delivering Effective Smart Grids

Mid-Term Evaluation

Performed by Anne Bengtson with appreciated support
from Tom Bastin, DECC, United Kingdom

This Mid-Term Evaluation for Task 23 – The Role of the Demand Side in Delivering Effective Smart Grids is submitted to the DSM IA Executive Committee in Wellington New Zealand, with a request for the Executive Committee to:

Note the result and take necessary actions on the recommendations.

In summary, participants have somewhat divergent views on their expectations of the Task, the anticipated results, progress to date and the anticipated value of participation, which perhaps suggests a lack of a shared understanding of the Task objectives. In particular, there seems to be a disconnect on the part of some respondents between what they see as the theoretical/abstract nature of work to date and an expectation that the Task would generate practical guidelines, recognizing that the two are not mutually exclusive and the one can inform the other. A significant minority of respondents (30%) felt that the Task Objectives would not be realised. A first step to addressing this would be to ensure that there is a clear understanding amongst all participants of what the objectives and desired outputs are and the milestones to delivery.

Overall, the collective expertise of the experts engaged in the Task was judged to be adequate but there were concerns that input from some experts had tailed off during the course of the Task. The view was also expressed that better use might have been made of national experts and that the balance between input from experts and that of the Operating Agent was not always optimal though it was recognized that this would have required greater commitment on the part of national experts. It was also suggested that the Task would have benefited from input from experts in the social sciences/behaviour change. There have also been positive steps to

engage end-users but more might be done.

On the positive side, the management by the Operating and the level of effort that the OA was putting into the Task was welcomed and it was recognized that pulling together a multi-disciplinary team was a challenge.

In terms of the impact of the outcomes of the Task to date, participants judged that it was too early judge impacts ahead of dissemination of the results of the Subtasks' work.

Recommendations for improvements are:

1. It is suggested that the Task should take the opportunity to revisit its objectives and milestones in order to ensure that there is a shared understanding and agreement of the future direction of work and the anticipated outputs.
2. The Task should consider how best to ensure that the expertise of the national experts is effectively tapped during the analytical stages of the Task's work, recognising the constraints on the time and resources that the national experts are able to commit to the Task.
3. The Task should consider whether there is a need to identify and bring into the project additional expertise on behaviour change, potentially by drawing on the synergies with Task 24, and also explore how best to engage with end-users.
4. The Task should start to plan how it can most effectively disseminate its findings as they emerge and judge its impact.

Mid-Term Evaluation Summary

Task 23 – The Role of the Demand Side in Delivering Effective Smart Grids

A Mid-Term Evaluation was conducted for Task 23 – The Role of the Demand Side in Delivering Effective Smart Grids during December 2013/January 2014.

- The response rate was 5 out of 5 Experts (100%). Responses were also received from 1 Operating Agent and 1 Executive Committee member.
- The **expected results and impacts** are **poorly described** (30%), **acceptably** (15%) to **well described** (55%) in the Task Concept Paper, Task Annex to the IA and Task Work Plan. Three reviewers provided the following responses: 1) It is difficult to provide a 'narrow' description of the results at the beginning of a project - there is always a first step to define the problem in more detail first - only once this is known the outputs can be identified in full; (2) I think the results can be interpreted in various ways - depending on the background and expertise of the expert. I read them as very practical guidelines/tools to design future smart grid projects, with a strong focus on consumer behavior. Not sure if they have been interpreted by everyone in the same way; and (3) Poorly described in the sense that they are a bit vague. On the other hand, it might not be possible to make them more distinct for this type of project.
- The **reasons to undertake this Task work** are **well described** (100%) and are clearly stated in the Task Concept Paper, Task Annex to the IA and the Task Work Plan. The motives are well defined
- The **approach to accomplish the Task work** is **adequately** (60%) to **well described** (40%). One responder stated that the approach described in the Task proposal provides a very good framework for the project - it defines the scope and approach, but allows flexibility for the project to adapt to the findings of the projects as it progresses. Another responder stated that the terminology used has been rather vague... and can be interpreted in different ways. A more detailed and precise description would have helped. Technically maybe Subtasks 2&3 have been fulfilled, but results stay at a very theoretical/abstract level. Practical guidelines, directly useful for smart grid design, have not been defined yet - while I think that all building blocks for doing so (analysis of survey and smart grid pilots/review of theories about behavior) are there. For commercial clients timing is everything, and delivering 'practical' results during the project would have been much appreciated.
- The **objectives** are **poorly, vague, unclear** (15%), **adequately stated** (42,5%) to **well stated** (42,4%). Objectives can be far more concrete which would make it easier for all to work on fulfilling the objectives. The objectives are **somewhat appropriate** (30%) to **appropriate** (70%) to the stated expectations. One responder comments that maybe the objectives are appropriate to the stated expectations, but the results so far are a bit lagging behind – technically maybe Subtasks 2&3 have been fulfilled, but results stay at a very theoretical/abstract level. Practical guidelines, directly useful for smart grid design, have not been

defined yet - while I think that all building blocks for doing so (analysis of survey and smart grid pilots/review of theories about behavior) are there to turn what there is already into something into practical value. The responders thought the objectives will **probably not** (30%), **probably** (40%) to **definitely** (30%) be achieved when the Task is over. Another responder stated that in theory, all Subtasks can be delivered without having practical guidelines on how to involve end-users. It is too early to judge what will be delivered as an end result and another responder stated that given the suggested changes in the approach, the objectives will be achieved when the Task is over.

- The **milestones** are **poorly** (15%), **adequately** (42,5%) to **well stated** (42,5%). Three responders provided the following comments: (1) the milestones could be much clearer but they are difficult to define at the beginning of the project. Maybe there needs to be an option to review the milestones once the project has started; (2) milestones do not necessarily say something about the content that is delivered, so milestones can be met without contributing to the overall objective; and (3) the milestones have not really been discussed much during the project, and I couldn't actually find the descriptions of the milestones when looking through the documents from the expert meetings. Hence, I would say they are not clearly stated. Further, the milestones for the planned work are rated **inappropriate** (15%), **adequately** (42,5%) to **most appropriate** (42,5%). One responder stated that for the national experts it would have been helpful (at least for myself) if there would have been more intermediate results (and thus milestones?). This would make the project more interactive, and we could have potentially added more value than currently is the case.
The milestones are **probably** (70%) to **easily** (30%) measureable, but it is important to take the relevance of the content into account, and not just if a report has been delivered.
- The **technical and professional quality** of the Task products, are considered to be **average** (60%) to **excellent** (40%). Lots of effort has been spent that is clear. But I think input from the angle of 'social sciences' is missing. Consumer behavior is a field of expertise of its own, now it feels a bit like engineers try to fill in these skills themselves.
- The **level of effort of the Experts** ranged between **inadequate** (30%), **adequate** (40%) to **very adequate** (30%). Three responses: (1) the input from the Experts has been varied - the effort level was very high at the beginning, but has tailed off as the project has commenced. One of the experts missed two of the four experts meetings, and as a result became detached from the project. Offers of teleconferences/Skype calls were made to counter act this effect; (2) I think the level of effort is equal to what has been described in the project plan. However, potentially more relevant outcomes could have been delivered if a larger share of the work would have been done by some of the national experts (but in this case nor tasks nor budgets were designed in such way that this was foreseen). a more evenly distribution of tasks could have been beneficial to the results; and (3) There is a challenge in this type of projects where different countries culture, policy and legislation have a great impact on the results and conclusions. I think that it would be beneficial if the national experts could have a more prominent

role other than supplying input and some minor analyses on a national level to the OA. A closer interaction between the experts from the different countries when performing the analyses would facilitate a better understanding of the differences and similarities of the participating countries, and the results from the project would become more applicable in different countries. However, this would require a significant increase in effort of the participating experts.

The **level of effort of the Operating Agent** ranged between **adequate** (60%) to **very adequate** (40%). The effort was great, but a multi-disciplinary team or a less strong technical focus could have lead to better results.

- The **collective expertise of Experts** with respect to the objectives ranged between **adequate** (60%) to **very adequate** (40%). One responder replied that the National Experts came from a diverse set of background and skills, which was perfect. Another responder said: I think the collective expertise was adequate, but in my opinion a lot of the work was done by the Operating Agent, while better use could have been made of the national experts (e.g. now only meetings and review rounds for input of experts foreseen - (additional to the market description and sending in case studies). An approach with more co-creation could have been more effective for both OA and national experts). A third responder stated: A broader expert group could be desirable. The **Operating Agent(s) level of expertise** was considered **inadequate** (15%), **adequate** (30%) to **very adequate** (55%). This may be the first time that the Operating Agent worked on a 'behavior' topic. I got the feeling that skills in the team didn't include expertise in social sciences - which would have been helpful. But strong technical expertise, and good project management skills.
- The **involvement of industry (users)** is considered **appropriate** (85%) to **very appropriate** (15%). Good feedback from the intended users but to early to say. In the UK a survey was held, which is positive, but industry, DSOs, governments etc. have not been involved to check the results with. The **involvement of the intended users** was rated **inadequate** (15%), **adequate** (55%) to **very adequate** (30%). In the UK a survey was held, which is positive, but industry, DSOs, governments etc. have not been involved to check the results with.
- The **Operating Agent(s) management** was rated **competent** (70%) to **excellent** (30%). The project has progressed smoothly without any major issues. The Operating Agent could have made better use of the expertise available with the national experts by involving them more (and more frequently) in both the approach followed in the various Subtasks and in delivering actual content/more frequent reviews.
- 60% of the reviewers agreed that **maximum value** has been has been obtained from the investment in the Task and 40% think it could be improved. Comments from responders include: (1) the value obtained is probably directly linked to the level of effort put into the Task by the participants - the more involved they were, then the more value will be obtained; (2) needs to be proven. So far no, too very few practical results for stakeholders in the field have been achieved; and (3) so far quite good, but is it Maximum?
- When asked whether the **early Task results are being used and have they had**

any impact, answers ranged between **too early to judge** (85%), **no noticeable impact** (15%).

- When asked whether the **early results have got to those who need them in an effective and efficient manner** the responses ranged between **too early to judge** (85%) and **effective dissemination** (15%). The dissemination Subtask still needs to be started.

Additional comments from a responder:

- That it is important for me that the results will be practical, and it is difficult to assess to what extent practical results (recommendations, guidelines, best practices, tools) will be delivered at the end of the project. With practical I mean in this context that they are useful for commercial clients as input for their (strategic) decision making processes and for actual design of future smart grid pilots.
- Buildings blocks for practical results are there. In Subtask 2 and Subtask 3 very valuable pieces of information are available, but they are not really integrated. Attempts have been made (e.g. with the behavioural model) but it still feels like unconnected analyses, not building up to an integrated result/ integrated conclusions/ integrated recommendations. I think with the information available, much stronger results could be delivered. And to do this, I think it would be helpful, to include experts with a background in social sciences or in policy studies – they can provide the specific skills that are needed in this context.
- Experts with such a background are included in the team. I think Even Bjørnstad is experienced in this field, and myself as well (others have – to the extent I am informed – a more technical background). A far larger pool of experts can of course be found in Task 24. But the project set up – as it is now – unfortunately doesn't foresee major contributions from experts outside EA Technology.

Recommendations

Opportunities for improvements in Task 23 – The Role of the Demand Side in Delivering Effective Smart Grids

1. It is suggested that the Task should take the opportunity to revisit its objectives and milestones in order to ensure that there is a shared understanding and agreement of the future direction of work and the anticipated outputs.
2. The Task should consider how best to ensure that the expertise of the national experts is effectively tapped during the analytical stages of the Task's work, recognising the constraints on the time and resources that the national experts are able to commit to the Task.
3. The Task should consider whether there is a need to identify and bring into the project additional expertise on behaviour change, potentially by drawing on the synergies with Task 24, and also explore how best to engage with end-users.
4. The Task should start to plan how it can most effectively disseminate its findings as they emerge and judge its impact.

The questionnaire was answered by:

5 Experts
1 Operating Agent
1 Executive Committee member

IEA Demand-Side Management Programme
Task 23 – The Role of the Demand Side in Delivering Effective Smart Grids

Evaluation Questionnaire

Expectations **Are the expected results and expected impacts of the Task work well described in either the Task Concept Paper, Task Annex to the Implementing Agreement, or Task Work Plan?**

Answers: Poorly described 30%
 Acceptably described 15%
 Well described 55%

Comments: It is difficult to provide a 'narrow' description of the results at the beginning of a project - there is always a first step to define the problem in more detail first - only once this is known can the outputs be identified in full.

 I think the results can be interpreted in various ways - depending on the background and expertise of the expert. I read them as very practical guidelines/tools to design future smart grid projects, with a strong focus on consumer behavior. Not sure if they have been interpreted by everyone in the same way.

 Poorly described in the sense that they are a bit vague. On the other hand, it might not be possible to make them more distinct for this type of project.

Motives **Are the reasons to undertake this Task or why it was important to undertake this Task clearly stated in any of the above documents?**

Answers: Well described 100%

Comments: The motives are well defined

Approach **Is the approach proposed to accomplish the Task work logical, appropriate, and/or well defined, in any of the above documents or as being implemented?**

Answers: Adequately described 60%
 Well described 40%

Comments: The approach described in the Task Proposal provides a very good framework for the project - it defines the scope and approach, but allows flexibility for the project to adapt to the findings of the project as it progresses.

Terminology used has been rather vague... see also Q1: can be interpreted in different ways. A more detailed and precise description would have helped. Technically maybe STs 2&3 have been fulfilled, but results stay at a very theoretical/ abstract level. Practical guidelines, directly useful for smart grid design, have not been defined yet - while I think that all building blocks for doing so (analysis of survey and smart grid pilots / review of theories about behavior) are there. For commercial clients timing is everything, and delivering 'practical' results during the project would have been much appreciated.

Objectives **Are the objectives clearly stated?**

Answers: Poorly, vague, unclear 15%
Adequately stated 42,5 %
Well stated 42,5 %

Comments: Objectives could be far more concrete - which would make it easier for all to work on fulfilling the objectives.

Are the objectives appropriate to the stated expectations?

Answers: Somewhat appropriate 30%
Appropriate 70%

Comments: Maybe the objectives are, but the results so far are a bit lagging behind. See also previous remark about turning what is there already (and all building blocks are there) into something with practical value.

In your opinion, are all of the objectives likely to be achieved when the Task is over?

Answers: Probably not 30%
Probably 40%
Definitely 30%

Comments: See previous remarks. In theory all subtasks can be delivered, without having practical guidelines on how to involve end users. It is too early to judge what will be delivered as an end result.

Given the suggested changes in the approach.

Milestones **Are the milestones clearly stated?**

Answers: Poorly 15%
Adequately 42,5 %
Well 42,5 %

Comments: The milestones could be much clearer - but they are difficult to define at the beginning of the project. Maybe there needs to be an option to review the milestones once the project has started.

Milestones not necessarily say something about the content that is delivered so, milestones can be met, without actually contributing to the overall objective. See also previous remarks.

The milestones have not really been discussed much during the project, and I couldn't actually find the descriptions of the milestones when looking through the documents from the expert meetings. Hence, I would say they are not clearly stated.

Are the milestones appropriate for the planned work?

Answers: Inappropriate 15%
Adequate 42,5%
Most appropriate 42,5%

Comments: For the national experts it would have been helpful (at least for myself) if there would have been more intermediate results (and thus milestones?). This would make the project more interactive, and we could have potentially added more value than currently is the case.

I cannot answer this question (see question 7) but the survey requires a answer otherwise it cannot be submitted. Please disregard the answer.

Are the milestones measurable?

Answers: Probably 70%
Easily 30%

Comments: They are, but it is important to take the relevance of the content into account, and not just if a report has been delivered.

I cannot answer this question (see question 7) but the survey requires a answer otherwise it cannot be submitted. Please disregard the answer.

Quality What is the technical or professional quality of the Task products?

Answers: Average 60%
Excellent 40%

Comments: Better for the participants to respond to this one.

Lot of effort has been spent that is clear. But I think input from the angle of 'social sciences' is missing. Consumer behavior is a field of expertise of its own, now it feels a bit like engineers try to fill in these skills themselves.

Participation **Is the level of effort of the experts and the OA adequate with respect to the objectives?**

Answers: **Experts**

Inadequate 30%
Adequate 40%
Very adequate 30%

Comments: The input from the Experts has been varied - the effort level was very high at the beginning, but has tailed off as the project has commenced. One of the experts missed two of the four experts meetings, and as a result became detached from the project. Offers of teleconferences/Skype calls were made to counter act this effect.

I think the level of effort is equal to what has been described in the project plan. However, potentially more relevant outcomes could have been delivered if a larger share of the work would have been done by some of the national experts (but in this case nor tasks nor budgets were designed in such way that this was foreseen). a more evenly distribution of tasks could have been beneficial to the results.

There is a challenge in this type of projects where different countries culture, policy and legislation have a great impact on the results and conclusions. I think that it would be beneficial if the national experts could have a more prominent role other than supplying input and some minor analyses on a national level to the OA. A closer interaction between the experts from the different countries when performing the analyses would facilitate a better understanding of the differences and similarities of the participating countries, and the results from the project would become more applicable in different countries. However, this would require a significant increase in effort of the participating experts.

Operating Agent

Adequate 60%
Very Adequate 40%

Comments: Effort was great, but a multi-disciplinary team or a less strong technical focus could have lead to better results.

Was the collective expertise of the experts and the OA appropriate with respect to the objectives?

Answers: **Experts**

Adequate 60%
Very adequate 40%

Comments: The National Experts came from a diverse set of background and skills, which was perfect.

I think it was adequate, but in my opinion lot of the work was done by the OA, while better use could have been made of the national experts (e.g. now only meetings and review rounds for input of experts foreseen - (additional to the market description and sending in case studies). an approach with more co-creation could have been more effective for both OA and national experts).

A broader expert Group could be desirable.

Operating Agent

Inadequate 15%
Adequate 30%
Very Adequate 55%

Comments: This may be the first time the OA worked on a 'behavior' topic. I got the feeling that skills in the team didn't include expertise in social sciences - which would have been helpful. But strong technical expertise, and good project management skills.

Industry **Is the involvement of the intended users appropriate?**

Answers: Appropriate 85%
Very appropriate 15%

Comments: Good feedback from many of the intended users - but too early to say

In the UK a survey was held, which is positive. But industry, DSOs, governments etc. have - to my information - not been involved to check results with.

Don't know

Is the involvement of the intended users adequate?

Answers: Inadequate 15%
Adequate 55%
Very adequate 30%

Comments: See previous point
Don't know.

Management How effective is the Operating Agent's management?

Answers: Competent 70%
Excellent 30%

Comments: No major issues raised, and project has progressed smoothly without major issues.

Although she could have made better use of the expertise available with the national experts by involving them more (and more frequently) in both the approach followed in the various tasks and in delivering actual content/ more frequent reviews.

Cost Effectiveness Has the maximum value been obtained from the money invested in this Task?

Answers: Could be improved 40%
Yes it has 60%

Comments: The value obtained is probably directly linked to the level of effort put into the task by the participants - the more involved they were, then the more value will be obtained.

Needs to be proved. so far no to very few practical results for stakeholders in the field have been achieved.

So far quite good, but is it Maximum?

Impact Are the early Task results being used and have they had an impact?

Answers: Too early to judge 85%
No noticeable impact 15%

Comments: None

Dissemination Did the early results get to those who need them in an effective and efficient manner?

Answers: Too early to judge 85%
Effective dissemination 15%

Comments: Dissemination ST still needs to be started.

Additional comments from a responder:

- That it is important for me that the results will be practical, and it is difficult to assess to what extent practical results (recommendations, guidelines, best practices, tools) will be delivered at the end of the project. With practical I mean in this context that they are useful for commercial clients as input for their (strategic) decision making processes and for actual design of future smart grid pilots.
- Buildings blocks for practical results are there. In Task 2 and Task 3 very valuable pieces of information are available, but they are not really integrated. Attempts have been made (e.g. with the behavioural model) but it still feels like unconnected analyses, not building up to an integrated result/ integrated conclusions/ integrated recommendations. I think with the information available, much stronger results could be delivered. And to do this, I think it would be helpful, to include experts with a background in social sciences or in policy studies – they can provide the specific skills that are needed in this context.
- Experts with such a background are included in the team. I think Even is experienced in this field, and myself as well (others have – to the extent I am informed – a more technical background). A far larger pool of experts can of course be found in Task 24. But the project set up – as it is now – unfortunately doesn't foresee major contributions from experts outside EA Technology.

AGENDA 5c. (43rd meeting of the IEA DSM Programme)

DOCUMENT J

Task 24
Task Status Report
Closing the Loop – Behaviour Change in
DSM: From theory to policies and practice

March 2014

Prepared by:
Dr. Sea Rotmann, New Zealand and DR. Ruth Mourik, DuneWorks, the
Netherlands

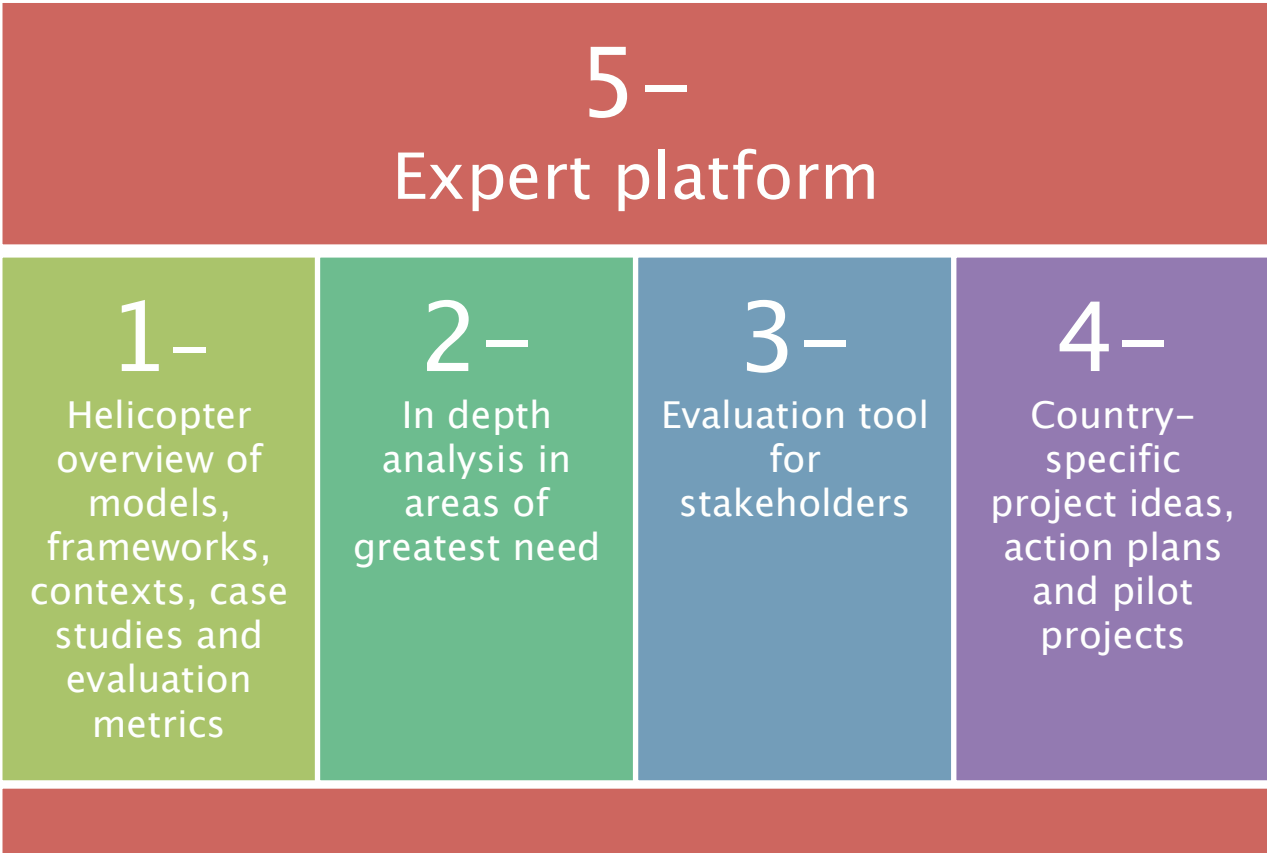
This Task Status Report is submitted to the ExCo meeting in Wellington with a request to:

- Approve the Task Status Report

INTERNATIONAL ENERGY AGENCY

IMPLEMENTING AGREEMENT ON TECHNOLOGIES AND PROGRAMMES FOR DEMAND SIDE MANAGEMENT

Task 24: Closing the Loop - Behaviour Change in DSM: From Theory to Practice



5th Task Status Report March 2014

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Dr Ruth Mourik, Operating Agent, Netherlands ruth.mourik@duneworks.nl

Prepared for the EXCO meeting in Wellington, March 18-19, 2014.

SUMMARY

Task 24 continues to attract experts from all over the world and generates widespread publicity. We have now finished our Subtask I analysis (over 160 pages of synthesis and stories from 40+ case studies from over 10 countries). Italy has officially joined the Task. South Africa and Austria have unofficially confirmed their participation in the Task, and contracts are being finalised. The UK has also continued to support the Task in-kind, with experts visiting Task workshops and supplying case studies and other support and analysis to Subtask 1. Finally, Spain and Portugal also started to contribute in kind and by supplying case studies and coming to workshops. A visit to the Queensland (Australia) Government in October 2013 proved highly successful and there is also a lot of interest in our work from the US.

The Task was presented at the Behaviour, Energy and Climate Change conference in Sacramento in November 2013 (the largest of its kind), both as a presentation and in a special session on transport behaviours which our Australian expert invited us to. We gave a keynote in Bonn in December 2013 at the German Development Institute conference. A large stakeholder feedback workshop was organised in Wellington in December 2013 as well. The online expert platform is also growing organically - we currently have over 200 experts from 20 countries signed onto the platform. All content generated by the Task is posted here. A wiki has been developed to enable better content management, analysis and collaboration for the Subtasks.

The Task is highly publicised in social media, via several blogs, columns, the weekly Behaviour Change and Energy newspaper, the @IEADSM twitter feed, the Co-Operating Agents' twitter, facebook and linkedin profiles and word of mouth. We have also successfully 'matchmade' several experts with one another, including across international borders. The only real issue the Task is facing in terms of deliverables is to organise the Advisory Board meeting.

PROJECT WORKPLAN

There is no behaviour change 'silver bullet', like there is no technological silver bullet that will ensure energy efficient practices. Designing the right programmes and policies that can be measured and evaluated to have achieved lasting behavioural and social norm change is difficult. We believe that this Task, and its potential extension, will help address these difficulties and come up with guidelines, recommendations and examples of best (and good) practice and learnings from various cultures and contexts. We rely on sector-specific experts (researchers, implementers and policymakers) from participating and interested countries to engage in an interactive, online and face-to-face expert platform and contribute to a comprehensive database of a variety of behaviour change models, frameworks and disciplines; various context factors affecting behaviour; best (and good) practice examples, pilots and case studies; and guidelines and examples of successful outcome evaluations. The Task has several deliverables, the most important being the expert network and platform for continued exchange of knowledge and successes and the large-scale analysis of the helicopter overview and case studies.

Task aims and objectives

- The main objective of this project is to create a global expert network and design a framework to allow policymakers, funders of DSM programmes, researchers and DSM implementers to:

- i. Create and enable an *international expert network* interacting with countries' expert networks
- ii. Provide a *helicopter overview* of behaviour change models, frameworks, disciplines, contexts, monitoring and evaluation metrics
- iii. Provide *detailed assessments* of successful applications focussing on participating/sponsoring countries' needs (smart meters, SMEs, transport, building retrofits)
- iv. Create an internationally validated *monitoring and evaluation template*
- v. Break down silos and *enable mutual learning* on how to turn good theory into best practice

Deliverables are broken down in Table 1 below (revised and based on 8 participating countries).

Phase / Duration of the action (in months)	preparation	1-2	3-4	5-6	7-8	9-10	11-12	13-14	15-16	17-18	19-20	21-22	23-24	25-26	27-28	29-30
Subtask 0: Management of the task																
0.1 Set-up an advisory board																
Workshop to finalise task definition in Austria/NL plus VC, 6-monthly ExCo meetings, Annual Advisory Board (AB) meetings, Task outcome presentation in South Africa?	Kick-off WS AUT/NL			ExCo		ExCo				AB ExCo		ExCo		AB	ExCo	
Subtask 1: Helicopter overview of models, frameworks, contexts, case studies and evaluation metrics																
1.0 Development of template to analyse models, frameworks and evaluation metrics																
1.1 Inventory of available models, frameworks and disciplines and analysis of applicability of models in differing contexts																
1.2 Deliverable on definitions of models and frameworks and their contextual applicability																
1.3 Build-up and continuous updating of database (wiki style)																
Workshops in BEL (August 2012) and UK (October 2012), summary in NZ workshop (February 2013)				WS Bel/UK	Web	WS NZ		WS NO								
Subtask 2: In depth analysis of topics of particular interest to participating countries																
2.1 Detailed characterisation of targeted cases and development of case study template																
2.2 Collection and analysis of case studies for different selected sectors, themes and countries with inventory of key context factors and success stories and learnings. Insert in database developed under ST1.3 (Note: extra length of time due to logistics of collecting case studies in countries when national expert workshops are held)																
2.3. Development of deliverable on context factors influencing DSM activities in topics of particular interest to participating countries																
Workshops and webinars in BEL and UK (same as in ST1), New Zealand (February 2013) and Norway (May 2013)				WS Bel/UK	Web	WS NZ	Web	WS NO		WS CH			WS NZ/WS Swe			
Subtask 3: Evaluation Tool																
3.1. Identifying relevant indicators/metrics/tools for monitoring and evaluation of DSM project and programmes																
3.2 Assessing context sensitivity of indicators/metrics/tools, dependent on stakeholder needs																
3.3. Developing and testing monitoring and evaluation tool																
Workshops Norway, Switzerland, Sweden (and Italy if it joins)								WS NO	VC	WS CH	Web	WS NZ/WS Swe	VC	WS Ita		
Subtask 4: Country-specific project ideas, research priorities, to do/not to do lists and ideas for pilot projects																
4.1 Development of stakeholder-tailored to do's and not to do's for successful context (country) sensitive implementation, monitoring and evaluation of DSM projects on selected topics and target groups (i.e. smart metering, SMEs and transport)																
4.2 Development of country specific research priorities, project ideas and pilot plans - to be put in practice if task extension is approved																
4.3 Dissemination of to do's and not to do's																
Workshops Switzerland, Norway, New Zealand and others if other countries become participants								WS NZ	WS NO	WS CH	Web	WS NZ/WS Swe	VC	WS Ita		
Subtask 5: Social media expert platform																
5.1 Overall coordination of the project																
5.2 Design of a Stakeholder Engagement Plan																
5.3 Design of the online platform and specification of its individual components in consultation with experts																
5.4 Utilisation of ongoing expert platform																
Workshop to finalise task definition in Austria/NL plus VC, ExCo meeting sign-off in Norway April 18, 2012. Ongoing online interaction	Kick-off WS AUT/NL	Web	Web	Web	Web	Web	Web	Web	Web	Web	Web	Web	Web	Web	Web	Web

Detailed Deliverables (based on 8 participating countries)

Subtask#	Deliverable name	Type of deliverable	Month of completion
0	D0 Advisory committee, Task Management	<ul style="list-style-type: none"> Network, annual meetings, governance Annual reports, ExCo updates, flyers, Spotlight articles, conference presentations, scientific papers, blogs, columns, tweets, publicity, networking, engagement with IEA Secretariat and other DSM groups and implementing agreements 	ongoing

Subtask#	Deliverable name	Type of deliverable	Month of completion
1	D1 Database/wiki listing collected models, contexts, evaluation metrics and a list and short descriptions of DSM policies, programmes and projects	<p>a. database/wiki with an inventory of what diverse (sub) disciplines have to offer both empirically and theoretically; and an inventory of evaluation metrics and contexts affecting behaviour change</p> <p>b. an overview of different definitions used in the field</p> <p>c. list of experts working with different models of understanding</p> <ul style="list-style-type: none"> - 2 templates that have been filled in with > 20 'models' and > 25 descriptions of DSM work in 4 themes - framework/navigation tool for stakeholders to evaluate models for diverse uses • filmed interviews with DSM experts highlighting issues central to diverse models of understanding • filmed short presentations by national experts on models of understanding they have provided • 'tweetable' (ie 140 characters or less) definitions of each model of understanding • positioning papers for Brussels and Oxford workshops • stories of 40+ case studies using models of understanding behaviour in practical applications 	12 but continuing thereafter
1	D2 Final 'report' on work in ST1	Interactive format, including film, graphics and interviews, tweets and podcasts as well as framework, tables and lists	18
2	D3 Surveys and post-evaluation of detailed case studies in 4 topics of particular interest to participating countries	<ol style="list-style-type: none"> 1. Report/interactive feedback 2. List of interview questions for case study surveys 3. Filmed interviews with some case study stakeholders 4. List of detailed case studies in participating countries and how certain models have contributed to a better understanding of DSM and behaviour change 5. special attention will be put on evaluation to be fed into Subtask III 6. Best practices of participating countries will be publicised 7. Country-specific context factors and key approaches to solving contextual issues on the local, regional and national level 	24
3	D4 Tool to evaluate 'successful outcomes' of DSM programmes	Interactive tool based on what works best for various stakeholder needs	24
4	D5 To do's and not to do's, priority research areas and ideas for pilots and projects for participating countries and stakeholders	<ul style="list-style-type: none"> - Country-specific briefs and other formats - Stakeholder analyses in participating countries 	30
5	D6 Social platform and meeting place for DSM and behaviour change experts and implementers	<ul style="list-style-type: none"> - Online social media platform for collaboration and dissemination - List of global experts, their bio, field of expertise and ability to engage with them - Face-to-face workshops in participating countries publicising countries' DSM successes and sharing learnings 	ongoing

OBJECTIVES FOR THE LAST 6 MONTHS

Subtask I - Helicopter Overview:

- All information of the 'Monster' to be put onto wiki
- A storybook of some of the most outstanding stories from the 'Monster'
- Analyse interviews with energy professionals telling their 'energy stories'
- Continue collecting case study templates from newly joined countries

Subtask II - Case studies:

- Collection of detailed case studies and best practice in four overarching themes
- Includes (filmed) interviews in the Netherlands, New Zealand, Belgium
- Analysis of case studies so far collected (Italy and South Africa to happen later in the year)

Subtask III - Evaluation Tool:

- Tool to enable better evaluation of successful behaviour change outcomes depending on the stakeholder point of view
- Partly based on 'Beyond kWh' paper by Karlin and Ford (2013)

Subtask V - Expert Platform:

- Continued growth of experts to the platform
- Utilisation of platform, including uploading all content from workshops and Subtasks and Wiki
- Create content including blogs and webcasts for DSM University
- Update whole platform to Ning 3.0 when it goes live
- Continue to foster engagement and 'matchmaking' among experts - tell the stories
- Continue publicising of Task 24 - including international conferences (ACEEE summer study, IEPPEC, BEHAVE, APA conference, NERI conference)

Subtask 0 - Administration:

- Advisory Group meeting in April (virtual)
- ExCo meeting and report-back Wellington
- National expert workshops and webinars (NZ)

PROGRESS AGAINST OBJECTIVES

1. SUBTASK I

Finish collection of templates of models and case studies

We have so far collected 40+ templates from 13 countries in all 4 domains (transport, SMEs, building retrofits and smart metering) and a ('living') table with all countries, cases, models and domains that have been collected can be found here:

https://www.dropbox.com/s/jsvqp45f30y7zsr/Table%20Domains-Countries_Cases_models%20and%20theories.doc

We have collected case studies in each domain (sometimes more than one per domain) in almost all of our participating countries (Belgium being the exception with only one template collected so far). We are still waiting for templates from countries that joined our Task later, like Italy, South Africa and (hopefully) Austria. However, as the analysis needed to be finalised in order to meet our obligations to the early participants, we will add these templates to the analysis at a later stage (providing an updated, final document at the end of Task 24).

Finish analysis and interactive report-back

We have finished the analysis and synthesis of all current case studies and summarised them into a 160pp report (The 'Monster' report can be found here: <http://bit.ly/task24monster> and a little teaser booklet can be found here: <http://bit.ly/Littlemonster>). This report has been commented on by the national and contributing experts and has received very enthusiastic feedback and responses. It contains a synthesis of all the case studies, the models used in various programmes, tables listing all evaluation metrics used in the various case studies, recommendations and questions for further enquiry. It also contains stories, in three separate formats: the stories of the various cases can be grouped into hero stories, learning stories, love stories and horror stories (see Janda & Topouzi, 2013). The story of each model has been described from the perspective of the end users and stakeholders using the models. And each case study has been described as its own short story, for example:

Once upon a time... there was a great, big organisation that was delivering mail and parcels all over New Zealand, called New Zealand Post.

Every day... 100s of courier drivers were driving 1000s of kms to deliver these parcels to Kiwis.

But, one day... NZ Post realised that it was spending way too much money on fuel and that its drivers weren't being as efficient as they could be.

Because of that... they decided to start a fuel efficient driver training programme, in order to teach their contractors to drive more efficiently (and safely).

But then... they realised that a lot of the drivers didn't like being told what to do!

Because of that... they very cleverly used their most respected contractors to become trainers of the other drivers and made it all about being good business sense.

So, finally... They took them on test drives and showed them that they could save between 5-40% of their fuel just by changing simple behaviours.

And, ever since then... there was an overall, ongoing reduction in fuel consumption of 5% among the drivers that have taken part in the programme. **The end.**

Wiki to collect and analyse case studies

A Wiki was developed and integrated into the Expert Platform - ie the same login and password can be used to access the Wiki (www.ieadsmtask24wiki.info). It will contain the entire report in an interactive way to be able to jump between sections of interest.

Analyse interviews of energy experts' own stories

We have now filmed almost 30 energy efficiency professionals' personal energy stories, as told in their own words. These professionals from all energy sectors talk about the way they use energy in their own lives, what they are particularly vigilant about, what they are proud of and what they think and wish they could do better. Each story is unique and provides great insight into the idiosyncracies and complexities of human behaviour and the various contexts that effect it. We have analysed these stories and will use excerpts from them to illustrate various models of understanding behaviour, contextual drivers and barriers, values, habits, emotions and social norms. All interviews can be found on the Expert Platform at www.ieadsmtask24.ning.com

Country energy stories (Part of Subtask 2)

We are collecting the 'energy story' of each participating country in Task 24, during each national workshop. The Belgian energy story has been filmed in Brussels in September 2012, and will be converted to a podcast. The NZ energy story has been filmed in Wellington

in 2013 and is on the Expert Platform, so are the Norwegian and Swiss energy stories. The Swedish energy story has been developed in collaboration with the Swedish stakeholders in Stockholm in September 2013. The slide presentations of all stories can also be found on the expert platform. Most participating countries have also provided a Pecha Kucha on their national energy story (20 slides with 20 seconds per slide only). They can also be found on the expert platform.

2. SUBTASK II

Collection of best practice case studies and interviews

So far, seven interviews have been filmed/recorded with experts in Norway and Austria (for 3 case studies); Sweden, Switzerland and the Netherlands (one case study each). They include a comparison of two very different approaches in feedback (smart metering domain), that attempted to attain a common goal (Energy Neighbourhoods 2 and €CO2 Management in Austria). We also filmed interviews on the Finnfjord ferrosilicon smelter in Norway, the most energy efficient smelter in the world (interviews were filmed with the CEO of Finnfjord and ENOVA, the Norwegian agency that supported the project; SME domain). We filmed an expert in Sweden (on the Stockholm congestion pilot; transport domain), Switzerland (on the 2000 Watt Society; buildings and transport domains) and the Netherlands (Power Matching City, smart meter/feedback domain). More case study interviews are going to be undertaken over the next 6 months in New Zealand and Belgium. The analysis of case studies will be undertaken as we collect them, with a final analysis to be expected towards the end of 2014. The Subtask is on track.

3. SUBTASK III

There has been considerable work done on Subtask III - Evaluation. We have analysed the Karlin and Ford 'Beyond kWh' paper as a possible template with experts in Norway and at the eceee summer study in an informal session. We have added all our Task 24 case studies to a Mendeley literature group which will be analysed by students working on the 'Beyond kWh' paper. We have also collected all evaluation metrics used in the case studies for Subtask I. The Subtask is on track.

4. SUBTASK IV

Information for this Subtask is continually collected in each of the country workshops we are undertaking. The country energy stories will contribute to the recommendations, as will information collected in Subtasks I, II and III. In addition, we have undertaken stakeholder surveys in the Netherlands and New Zealand (see reports on the IEA DSM ning site) and collected feedback from stakeholders in Switzerland in October 2013. The Subtask is on track.

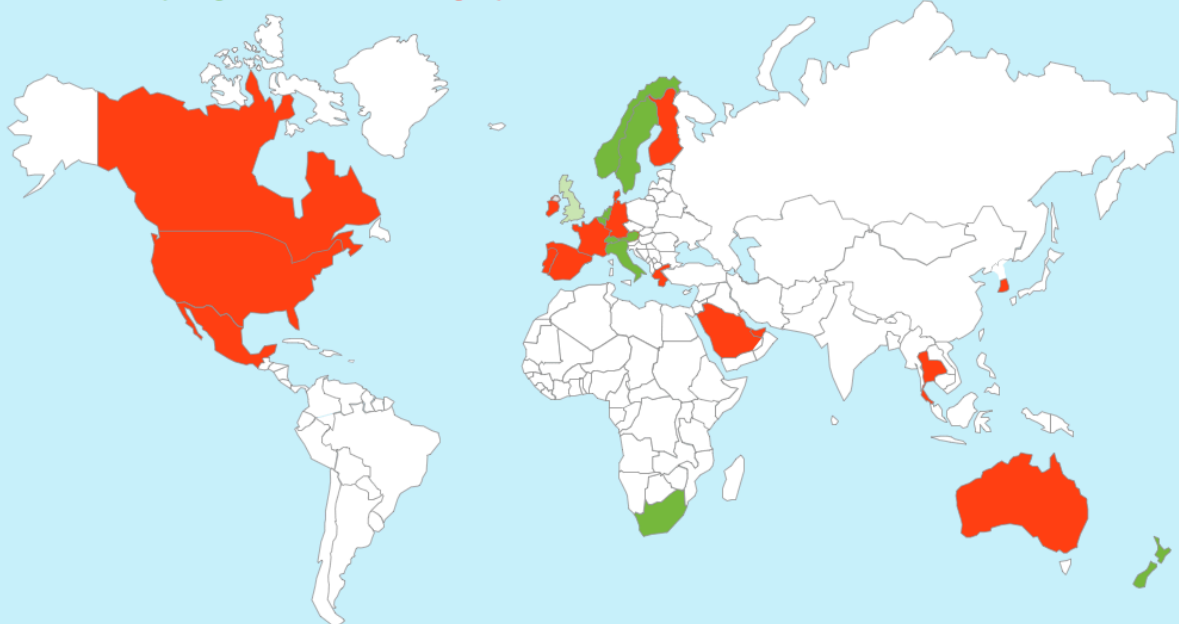
4. SUBTASK V

Continued growth of experts on the platform

The Expert Platform is continually and organically growing and currently contains biographies and details from 204 experts from 7 sectors from 21 countries (see worldmap, below).

World Map of

Participating countries, contributing experts



Expert platform currently has over 200 experts from 21 countries and 7 main sectors.

Utilisation and Engagement with Expert Platform

The expert platform has an incredible wealth of information on it:

- 102 videos and presentations from all workshops, including a professional, 25min film from the 2-day Oxford workshop
- 75 photos, including impressions from all workshops
- 6 blogs from Sea Rotmann, two from Juan Pablo Garcia
- 14 events
- 23 discussion fora
- 3 member groups for Subtasks I, II and III

From Google Analytics stats, we can see that the platform is well utilised, with the average visitor staying around 9 minutes and clicking through the various sites. Where we still face problems, is engagement. Even though people are looking at the information (particularly after broadcast messages have been sent with digests and links to all new information), they are loathe to comment, add to, or even 'like' the content. They are also not utilising the many communication functions of the platform, such as private messaging between members and chat. The previous issues around managing content were resolved by connecting a Task Wiki to the platform. The dropbox has also been used successfully to collect and share information with the national experts. Matchmaking between various stakeholders has been quite successful and this Task has fostered many connections between members, both nationally and internationally. However, the most successful ways to create these connections was still via face-to-face workshops, which have proven invaluable to the Task and personal relationships with the Operating Agents.

Creating content for IEA DSM website and DSM University

This will be undertaken as the website will be updated and the DSM University developed. We are keen to trial the European Copper Institute's webinar tool for Task 24. We have updated the Task 24 Flyer and provided two Spotlight articles.

Dissemination of Results and Discussion with Stakeholders

Task 24 has produced a number of publications and given presentations at various conferences and workshops to disseminate and discuss the Task results. It is also widely disseminated and publicised online, via social media and social networks. Furthermore, stakeholder workshops and webinars were organised in conjunction with each project meeting to discuss behaviour change topics relevant to the host country of the meeting. We have also done a cross-over workshop with Jan Bleyl, Operating Agent from Task 16 at the eceee summer study and are currently finalising a paper on Facilitators for Task 16.

Task 24 Publications and reports

- IEA DSM Initial Positioning Paper on Behaviour Change
- IEA DSM Task 24 Draft and Final Workplans
- IEA DSM Spotlight Issues (6 stories so far)
- IEA DSM Task Flyer 24 (updated)
- IEA DSM website Task 24 (updated)
- Positioning paper and minutes from Brussels workshop
- Positioning and definitions paper and UKERC report from Oxford workshop
- 25 minute professional film summarising Oxford workshop
- Template for Models of Understanding Behaviour via Case studies in 4 domains (40+ and counting)
- IEA DSM Task 24 Pecha Kucha presentation (powerpoint/film)
- 5 participating countries' Pecha Kucha presentations (powerpoint/film)
- Interviews of experts' own energy stories (film, over 30 so far)
- Belgian, NZ, Swiss and Norwegian DSM and behaviour change story (podcast/film) - underway
- NZ World Café report-back (film/presentations/documents)
- ECEEE summer study (2013) paper on Task 24 by Rotmann and Mourik
- ELCAS (2013) paper by Carabias-Hütter, Lobsiger-Kagi, Mourik and Rotmann (2013)
- BECC (2013) presentations on Task 24 and transport behaviour
- Overview of definitions and how they were derived (powerpoint)
- Overview of models of understanding behaviour (powerpoint/film)
- NL, Swiss and NZ stakeholder analyses (powerpoint, report)
- Implementation bloopers (powerpoint/film)
- 10 presentations on various aspects of behaviour change models (powerpoint/film)
- Interview with energynet.de (podcast)
- Analysis of Subtask I (160pp report, wiki)
- The Little Monster storybook (booklet)
- Green Growth Article (2013)
- Presentation to Energy Savers Dubai, UAE June 2013 (<http://www.slideshare.net/drsea/task-24-behaviour-change-presentation-to-energy-savers-dubai-23602026>)
- Presentation and 3 informal workshops at eceee June 2013
- Informal Task presentations at RSE (Milan, Italy); Leeds University (UK); Stockholm Technical Institute (Sweden); Grazer Energy Agency (Austria); Energy Efficiency and Conservation Authority and Ministry of Business, Employment and Innovation (New Zealand); UCLI (USA)

- Conference and workshop presentations at Utrecht DSM workshop (NL); eceee (France); ELCAS (Greece); IEEE ISGT (Denmark); Luzern DSM Workshop (CH); BECC conference (USA)

Online sharing and administration of Task 24

- Widely disseminated via @IEADSM on twitter (also @DrSeaRotmann and @RuthMourik), IEADSM linkedIn and facebook groups; ECEEE and EEIP columns and various energy and behaviour linkedIn groups
- Weekly publication of [Behaviour Change & Energy News](#) by Dr Sea Rotmann
- Expert platform www.ieadsmtask24.ning.com
- Mendeley (www.mendeley.com) Task 24 Group and bibliography database of >400 behaviour change and energy publications
- CRM Capsule (www.crmcapsule.com) contact relationship management system, collects all emails and contact information related to the Task
- Behaviour change and energy pearlree (www.pearlree.com) to collect and manage related websites etc
- Task 24 dropbox (www.dropbox.com) to share templates and collected models etc
- Task 24 wikipedia (www.ieadsmtask24wiki.info)
- Task 24 youtube channel (<http://www.youtube.com/user/DrSeaMonsta/videos?flow=grid&view=0>)
- Task 24 slideshare (<http://www.slideshare.net/drsea>)

5. SUBTASK 0

Meetings, webinars, report-back

The Advisory Group invitations have been sent out in March 2013. The online meeting planned for December was not able to be organised due to time constraints of the Advisory Board members.

All other meetings, national expert workshops and webinars, as well as conferences and seminars where the Task was presented are shown below. We are part of the Technical Steering Committee for the BEHAVE conference in the UK this September and will chair the 'Social media, gamification and storytelling' panel.

Meetings and workshops held so far

Date	Place	Total # Experts	# of countries	Type of meeting	Government	Business and NGO	Academic
10/4/12	Utrecht, NL	23	4	Task kick-off	4	9	10
10/4/12	Graz, AUT	5	2	Task kick-off	4	1	1
11/4/12	online	13	6	Webinar - Task kick-off	2	2	9
3/5/12	online	6	5	Webinar - Expert Platform	1	1	4
30/8/12	Utrecht, NL	20	1	Stakeholder Meeting NL	2	12	6
7/9/12	Brussels, BE	24	8	Expert Workshop	3	8	13
9&10/10/12	Oxford, UK	65	9	Expert Workshop	3	13	39
26/10/12	online	6	5	Expert Webinar		2	4

Date	Place	Total # Experts	# of countries	Type of meeting	Government	Business and NGO	Academic
12/11/12	online	6	5	Expert Webinar		2	4
20/12/12	Utrecht, NL	22	1	Stakeholder Meeting NL	1	14	7
7/2/13	online	6	5	Expert Webinar		2	4
15/2/13	Wellington, NZ	50	4	Expert Workshop	15	15	20
22/5/13	Graz, AUT	10	2	Social Media in Task 24		10	
27-29/5	Trondheim, NO	20	8	Expert Workshop	1	3	17
10/10/13	Stockholm, SE	12	2	Expert Workshop	4	1	7
15/10/13	Luzern, CH	30	9	Expert Workshop	3	12	15

Seminars and/or Conferences where Task was presented so far

Date	Place	Total # Experts	# of countries	Type of meeting
8/5/12	Linköping, SE	20	2	Presentation to University
29-31/8/12	Basel, CH	~300	15+	Task Presentation at 3rd Intl Sustainability Conference
19/9/12	Helsinki, FI	20	3	Task Presentation to Finnish Experts
20-21/9/12	Helsinki, FI	~250	15+	Task Presentation and session chairing at BEhave conference
24-25/10/12	Berlin, GER	100s	10+	Attendance at EEIP 'Energy Recovery in Industry: Opportunity for energy efficiency' conference
17/12/12	Wellington, NZ	10	1	Stakeholder update NZ Government
13-14/2/13	Wellington, NZ	100+	6	National Energy Research Institute conference 'Energy at the Crossroads'
13/3/13	Paris, FR	30+	28	Presentation to IEA Secretariat Behaviour Workshop 'Choices, Decisions and Lifestyles Roundtable'
24/4/13	Utrecht, NL	50+	12	DSM Workshop 'The NL Polder Model', 2 presentations
7/6/13	Hyères, FR	450+	45	eccee summer study, 1 presentation, 3 informal sessions
15/6/13	Milan, IT	15	2	presentation to RSA - Italian stakeholders
17/6/13	Dubai, UAE	30+	3	Task 24 Presentation at UAE Energy Savers
8/7/13	Nisyros, Greece	100+	10+	Task 24 presentation by Swiss expert at ELCAS
21/8/13	Wellington, NZ	6	1	Stakeholder update NZ Government
7/10/13	Copenhagen, DE	100+	15+	IEEE ISGT conference - also leading Consumer Behaviour panel
16/10/13	Luzern, CH	30+	10+	IEA DSM Workshop
8/10/13	Stockholm, SE	8	2	Presentation at Technical Institute Stockholm

Date	Place	Total # Experts	# of countries	Type of meeting
11/10/13	Brisbane, AUS	25	2	Skype lecture to Qld University energy efficiency course
27/10/13	Brisbane, AUS	12	2	Presentation to Queensland Government
20/11/13	Sacramento, US	500+	15+	BECC Conference presentation
20/11/13	Sacramento, US	25+	6	Transport panel at BECC conference
2/12/13	Flanders, BE			Smart Grid conference
12/12/13	Bonn, DE			Expert Roundtable on Energy Efficiency & Behaviour in Developing Countries, German Development Institute
17/12/13	Wellington, NZ	40	1	Stakeholder update NZ Government

WORKPLAN FOR THE NEXT 6 MONTHS

Reports and Publications planned

- Subtask I - Helicopter Overview Wiki of report
- Subtask II - collection and analysis of case studies and best practice in four overarching themes
- Subtask III - template to enable better evaluation of successful behaviour change outcomes depending on the stakeholder point of view
- NERI conference paper on Task 24
- DSM workshop on Storytelling in Wellington
- Spotlight issues and columns on various aspects of the Task
- Webinar for DSM University
- Papers for BEHAVE and IEPPEC conferences

Meetings planned for 2014

Several meetings, both face-to-face and online, are planned for the coming 6 months, including an Advisory Board meeting in April. From March 17, 2014, the NZ stakeholders will hold an 'International Sustainable Energy Week', co-organised by the NZ ExCo and Task 24. It will include a DSM workshop, ExCo meeting, and National Energy Institute (NERI) conference. The Task is currently awaiting decisions on papers to be presented at American Psychological Association (August 2014), IEPPEC (Berlin, Sept 2014) and BEHAVE (Oxford, Sept 2014).

FINANCE

Costs (revised for 7 countries)

Description personmonths /costs	Cost (Euro)	personmonths Sea Rotmann per subtask	personmonths Ruth Mourik per subtask	total costs Sea Rotmann	total costs Ruth Mourik	total sum
Subtask 0	4500	3	1.5	13500	6750	20250
Subtask 1	4500	6	3	27000	13500	40500
Subtask 2	4500	6	3	27000	13500	40500
Subtask 3	4500	6	3	27000	13500	40500
Subtask 4	4500	5	2.5	22500	11250	33750
Subtask 5	4500	4	2	18000	9000	27000
Total personmonths /costs		30	15	€162000	€54000	€202500

Description costs	Costs					
OAs travel costs	55000	costs travel Sea Rotmann and Ruth Mourik including extended stay in Europe of Sea Rotmann and frequent face to face meetings RM and SR (6 times travel SR to Europe from New Zealand)				
stakeholder analyses	5000	separate meetings and costs associated with stakeholder analyses				
website and data management	10000	including website, webinars, VC, social media, blogs/vlogs, database etcetera				
overheads and incidentals	7500					
Total	€77500					€280000

Income and Spending to date

Income	Cost
Country participation: NL €40,000 (finished) SE €30,000 NZ €40,000 (finished) NO €40,000 (finished) CH €40,000 (finished) BE €30,000 IT €40,000 (finished) €260,000	Person months Sea Rotmann 26pm Ruth Mourik 13pm €175,500
In-kind: UKERC Meeting Place Oxford Workshop contribution €40,000 NZ Workshop contribution NZ\$3600 Energy Savers Dubai Workshop contribution Approx €1000 In-kind expertise from non-participating countries: Over 10 weeks expert time	Travel and web development, video, incidentals: Sea Rotmann €37000 Ruth Mourik €8500 €45,500

MATTERS FOR THE EXCO

Please accept this Task Status Update.

TASK 24

Task 24 – Closing the Loop – Behaviour Change in DSM: From theory to policies and practice

Mid-Term Evaluation

Performed by Anne Bengtson with appreciated support from Tom Bastin, DECC, United Kingdom

This Mid-Term Evaluation for Task 24 – Closing the Loop – Behaviour Change in DSM: From Theory to policies and practice is submitted to the IEA DSM IA Executive Committee in Wellington New Zealand, with a request for the Executive Committee to:

Note the result and take necessary actions on the recommendations.

In summary, the Task is performing well and has already made significant progress with value being obtained from the work to date and positive feedback from participants. There is a clear vision of what the Task is trying to achieve (recognising that the Task is very wide in its scope) and the objectives are considered to be deliverable with appropriate milestones established for the work.

The collective expertise of the Task participants and the Operating Agents, drawn from a variety of fields, has proved appropriate to the objectives of the Task with largely effective engagement with end users. Management of the Task by the Operating Agent has also been effective and appreciated by participants.

It is probably too early to draw conclusions on the use being made of the task report and the impact it is having but it is encouraging that a number of participants already feel it is having significant impacts. Effective dissemination of the results will be important in ensuring the work has the widest impact. Going forward there are only minor recommendations for consideration by the Task Group

Recommendations for improvements are:

1. The report has only recently been published and it will be important to continue to look for appropriate opportunities to disseminate the findings and to keep under review the use that is being made of the report by policy makers and others.

Mid-Term Evaluation Summary

Task 24 – Closing the Loop: Behaviour Change in DSM: From theory to policies and practice

A Mid-Term Evaluation was conducted for Task 24 – Closing the Loop: Behaviour Change in DSM: from theory to policies and practice during December 2013/January 2014.

- The response rate was 8 out of 8 Experts (100%). Responses were also received from 1 Operating Agent and 1 Executive Committee member.
- The **expected results and impacts** are **acceptably** (30%) to **well described** (70%) in the Task Concept Paper, Task Annex to the IA and Task Work Plan.
- The **reasons to undertake this Task work** are generally **acceptably stated** (10%) to **well described** (90%). One responder stated that it is clear that the role of human behavior and habits in increasing energy efficiency, needs to be addressed more rigorously and Task 24 is part of this addressing and is clearly stated in the Task Concept Paper, Task Annex to the IA and the Task Work Plan.
- The **approach to accomplish the Task work** is **adequately** (50%) to **well described** (50%). One responder stated that the method of collecting case studies is perfectly **appropriate** for the type of Task work involved, and the workload on the various Task members is in line with the original proposal's projection of work hours. Of course, the Task is very wide in scope, so whether it will be as easy to implement when moving to other Subtasks remains to be seen. It's certainly doable.
- The **objectives** are **adequately stated** (30%) to **well stated** (70%). One responder stated that each Subtask is clearly divided into specific goals which are related to the overarching topic. The objectives are **appropriate** (100%) to the stated expectations. The responders thought the objectives **probably** (60%) to **definitely** (40%) would be achieved when the Task is over. One responder stated that it is a huge Task and the program outlined will only start to address the issues of how best to achieve energy behaviour change. I hope that the program can continue, as more work will be needed to build on this excellent base and communicate findings widely. Also, it's 'definitely' not 'definitely'. Another responder said that all objectives will definitely be achieved if the Task gets an extension.
- The milestones are **adequately** (40%) to **well stated** (60%) and **adequately** (70%) to **most appropriate** (30%) for the planned work. The milestones are **probably** (70%) to **easily** (30%) measureable.
- The **technical and professional quality** of the Task products are considered to be **average** (20%) to **excellent** (80%). The first Task report is well written and impressively sourced, and it seems that recipients find it both useful and understandable - something the OA's have stressed. Another responder stated that if they could they would give it more than average but less than excellent, and think the products are very good given the very limited funding and personnel time available.

- The **level of effort of the Experts** ranged between **inadequate** (10%), **adequate** (50%) to **very adequate** (40%). Given the number of Experts involved, the level varies. Again given the number it's a great job well done. The **level of effort of the Operating Agent(s)** ranged between **adequate** (40%) to **very adequate** (60%). One responder added that they are working very hard, very hard!
- The **collective expertise of Experts** with respect to the objectives ranged between **adequate** (40%) to **very adequate** (60%). All the Experts come from a relevant background, yet still from a variety of fields. One responder said that although they had not met all experts, those they had met seemed very knowledgeable. The **Operating Agent(s) level of expertise** was considered **adequate** (10%) to very adequate (90%). The Task has two Operating Agents, one of which has more than adequate topical expertise while the other comes from a different background and has good organizational qualifications.
- The **involvement of industry (users)** is considered **appropriate** (30%) to **very appropriate** (70%). For a Task that focuses on human behavior in a wide sense, it makes sense to cast a wide net in terms of involved users. The **involvement of the intended users** was rated **inadequate** (10%), **adequate** (40%) to **very adequate** (50%).
- The **Operating Agent(s) management** was rated **competent** (60%) to **excellent** (40%). Cooperation and support with the Operating Agent(s) has been very professional. Another comment states that the Operating Agent gets things done, even if management at times takes the form of chaos control rather than strict guidance. This is of course due to the nature of academics who are not easy to manage.
- 80% of the reviewers agreed that **maximum value** has been obtained from the investment in the Task. More time is needed to finish all the Subtasks and more resources to address further need for research. Money invested by Task members has been used economically and with an eye for what if useful for the Task.
- When asked whether the **early Task results are being used and have they had any impact**, answers ranged between **too early to judge** (60%), **no noticeable impact** (10%) and **significant impact** (30%). One of the major outcomes of the Task has been the production of a report that has just hit the ground, so it is a bit early to judge. However, from the feedback so far it seems to have been well received, although it is hard to say whether it has resulted in any new policies or suchlike.
- When asked whether the **early results have got to those who need them in an effective and efficient manner** the responses ranged between **too early to judge** (30%) and **effective dissemination** (70%). Reviewer comments included: (1) Additional dissemination efforts by the Executive Committee members would be most useful to achieve stronger impacts; (2) One of the major outcomes of the Task has been the production of a report that has just hit the ground, so it is a bit early to judge. However, from the feedback so far it seems to have been well received, although it is hard to say whether it has resulted in any new policies or suchlike; and (3)The report (the Monster) has to be let loose even more!

Recommendations

Opportunities for improvements in Task 24, Closing the Loop - Behaviour Change in DSM: From theory to policies and practices

1. The report has only recently been published and it will be important to continue to look for appropriate opportunities to disseminate the findings and to keep under review the use that is being made of the report by policy makers and others.

The questionnaire was answered by:

8 Experts
1 Operating Agent
1 Executive Committee member

IEA Demand-Side Management Programme

Task 24 – Closing the Loop: Behaviour Change in DSM: From theory to policies and practice

Evaluation Questionnaire

Expectations **Are the expected results and expected impacts of the Task work well described in either the Task Concept Paper, Task Annex to the Implementing Agreement, or Task Work Plan?**

Answers: Acceptably described 30%
Well described 70%

Comments: To the extent that it is possible to clearly define results and especially impacts of this type of thing, I would say that they are well defined.

Motives **Are the reasons to undertake this Task or why it was important to undertake this Task clearly stated in any of the above documents?**

Answers: Acceptably stated 10%
Well described 90%

Comments: It is clear that the role of human behaviour and habits in increasing energy efficiency needs to be addressed more rigorously, and this task is a part of this addressing. This is clearly stated in the above documents.

Approach **Is the approach proposed to accomplish the Task work logical, appropriate, and/or well defined, in any of the above documents or as being implemented?**

Answers: Adequately described 50%
Well described 50%

Comments: The method of collecting case studies is perfectly appropriate for the type of task work involved here, and the workload on the various task members is in line with the original proposal's projection of work hours. Of course, the task is very wide in scope, so whether it will be as easy to implement when moving to other subtasks remains to be seen. It's certainly doable...

Objectives**Are the objectives clearly stated?**

Answers: Adequately stated 30 %
Well stated 70 %

Comments: Each subtask is clearly divided into specific goals, which are related to the overarching topic.

Are the objectives appropriate to the stated expectations?

Answers: Appropriate 100%

Comments: None

In your opinion, are all of the objectives likely to be achieved when the Task is over?

Answers: Probably 60%
Definitely 40%

Comments: If the Task gets an extension...

It is a huge Task and the programme outlined will only start to address the issues of how best to achieve energy behaviour change. I hope that the programme can continue, as more work will be needed to build on this excellent base and communicate findings widely. Also, its 'definitely' not 'definitely'.

Milestones**Are the milestones clearly stated?**

Answers: Adequately 40 %
Well 60 %

Comments: None

Are the milestones appropriate for the planned work?

Answers: Adequate 70%
Most appropriate 30%

Comments: Can't see anything called 'milestone' in the work plan. Is that the same thing as a deliverable?

Are the milestones measurable?

Answers: Probably 70%
Easily 30%

Comments: I am assuming that deliverables are milestones.

Quality **What is the technical or professional quality of the Task products?**

Answers: Average 20%
 Excellent 80%

Comments: The first task report is well written and impressively sourced, and it seems that recipients find it both useful and understandable - something the OAs have stressed.

 If I could I would give it more than average but less than excellent. I think the products are very good given the very limited funding and personnel time available.

Participation **Is the level of effort of the experts and the OA adequate with respect to the objectives?**

Answers: **Experts**

 Inadequate 10%
 Adequate 50%
 Very adequate 40%

Comments: We'll it's not, but I can't send this questionnaire if I don't choose. "Other" has to be accompanied by a choice. Given the number of experts involved, the level varies. Again given the number, I think its a great job, well done

 I can only speak on behalf of myself, but I must admit that it sometimes takes some cajoling from the OAs to get me to deliver on my promises. Not that I haven't delivered what I should have, but the task work does come in addition to my regular full-time employment, so it can be tasking to be on the money for every deadline.

Operating Agent

 Adequate 40%
 Very Adequate 60%

Comments: They're working hard, very hard!

Was the collective expertise of the experts and the OA appropriate with respect to the objectives?

Answers: **Experts**

 Adequate 40%
 Very adequate 60%

Comments: All the experts come from a relevant background, yet still from a variety of fields.

I can't really comment on this as I am not fully familiar with the expertise of the experts. The few I've met seem very knowledgeable.

Operating Agent

Adequate 10%
Very Adequate 90%

Comments: This task has two OA's, one of which has more than adequate topical expertise. While the other comes from a different background, there is nothing lacking in her organisational qualifications.

Industry Is the involvement of the intended users appropriate?

Answers: Appropriate 30%
Very appropriate 70%

Comments: For a task that focuses on human behaviour in a wide sense, it makes sense to cast a wide net in terms of involved users.

For Austria: involvement of target groups has been recently started

Is the involvement of the intended users adequate?

Answers: Inadequate 10%
Adequate 40%
Very adequate 50%

Comments: None

Management How effective is the Operating Agent's management?

Answers: Competent 60%
Excellent 40%

Comments: The OA gets things done, even if management at times takes the form of chaos control rather than strict guidance. This is of course due to the nature of us academics, who are as easy to manage as a herd of cats (although one of the Operating Agents should have plenty experience with this!).

Cooperation and support with the OA has been very professional

Cost Effectiveness Has the maximum value been obtained from the money invested in this Task?

Answers: Could be improved 20%
Yes it has 80%

Comments: With the caveat that I can only speak for my own budget, so far I would say that the money invested by task members has been used economically and with an eye to what is useful for the task.

but more time is needed to finish all subtasks and more resources to address further need for research...

Austria: cannot be answered due to the fact that cooperation has quite recently started (but there has to be set a tick otherwise, the questionnaire cannot be finished)

Impact **Are the early Task results being used and have they had an impact?**

Answers: Too early to judge 60%
No noticeable impact 10%
Significant impact 30%

Comments: One of the major outcomes of the Task has been the production of a report, which is only now doing the rounds. Thus, it is a bit early to call. However, it seems from what feedback I have seen that it is well received, although it is hard to say whether it has resulted in any new policies or suchlike.

For Austria: due to the fact that cooperation has quite recently started

Too early to say

Dissemination **Did the early results get to those who need them in an effective and efficient manner?**

Answers: Too early to judge 30%
Effective dissemination 70%

Comments: But we have to turn the monster loose even more

One of the major outcomes of the task has been the production of a report which is only now doing the rounds. Thus, it is a bit early to call. However, it seems from what feedback I have seen that it is well received, although it is hard to say whether it has resulted in any new policies or suchlike.

Additional dissemination efforts by the ExCo members would be most useful to achieve stronger impacts.

Too early to judge for Austria: due to the fact that cooperation has quite recently started

AGENDA 6a. (43rd meeting of the IEA DSM Programme)

ATTACHMENT E

Part 2 of the Pre-Meeting Document (PMD)

Task 25

Task Status Report

Business models for a more effective market uptake of DSM energy services

March 2014

Prepared by Ruth Mourik, DuneWorks, the Netherlands

This Task Status Report is submitted to the ExCo meeting in Wellington with a request to:

- | |
|--|
| <ul style="list-style-type: none">• Approve the Task Status Report |
|--|

AGENDA 6b. (43rd meeting of the IEA DSM Programme)

ATTACHMENT F

Part 2 of the Pre-Meeting Document (PMD)

Task 16 Task Status Report Energy Efficiency and Demand Response Services – Phase 3

March 2014

Prepared by: Jan W. Bleyl, EnergeticSolutions, Austria

This Task Status Report is submitted to the DSM IA ExCo meeting in Wellington with a request to:

- Approve the Task Status Report

Agenda 6b.

DOCUMENT L

Task 16

Competitive Energy Services – Phase III Energy Efficiency and Demand Response Services

Mid-Term Evaluation

Performed by Anne Bengtson with appreciated support
from Tom Bastin, DECC, United Kingdom

This Mid-Term Evaluation for Task 16: Competitive Energy Services – Phase III – Energy Efficiency and Demand Response Services is submitted to the IEA DSM IA Executive Committee in Wellington New Zealand, with a request for the Executive Committee to:

Note the result and take necessary actions on the recommendations.

In summary, the Task is proceeding well with members gaining significant value from their participation and the Task outputs. The objectives of the task were clear and members considered there was a high likelihood that these objectives would be realized with clear and achievable milestones established.

Overall, the expertise of participants and the operating agent is considered to be appropriate in respect of the Task's objectives and end-users have been effectively engaged through stakeholder meetings, though it was suggested that additional expertise might be required in Demand Response Services.

Participants were appreciative of the management of the Task by the Operating Agent which was rated excellent by 90% of respondents. It also encouraging that participants felt that the Task's outputs were being effectively disseminated and were already having a significant impact, though there was still room to improve dissemination at the national level.

Going forward there are only minor recommendations for consideration by the Task Group

Recommendations for improvements are:

1. The Task should consider whether it has sufficient expertise available to it on Demand Response Services to fulfill its remit, and if necessary consider where it could source such expertise
2. The Task should continue to consider opportunities for further dissemination of Task Outputs, particularly at the national level

Mid-Term Evaluation Summary

Task 16 - Competitive Energy Services – Phase III Energy Efficiency and Demand Response Services

A Mid-Term Evaluation was conducted for Task 16 Competitive Energy Services – Phase III Energy Efficiency and Demand Response Services during December 2013/January 2014.

- The response rate was 7 out of 7 (100%). The survey was also answered by 1 Operating Agent and 1 Executive Committee member.
- The **expected results and impacts** are **acceptably described** (10%) to **well described** (90%) in the Task Concept Paper, Task Annex to the IA and Task Work Plan.
- The **reasons to undertake this Task work** are **well stated** (100%) in the Task Concept Paper, Task Annex to the IA and the Task Work Plan.
- The **approach to accomplish the Task work** is **adequately described** (20%) to **well described** (80%).
- The **objectives** are **adequately stated** (20%) to **well stated** (80%). The objectives are **somewhat appropriate** (10%) to **appropriate** (90%) to the stated expectations. The responders thought the objectives would **probably not** (10%), **probably** (60%) to **definitely** (30%) be achieved when the Task is over. This depends partly on the input of national experts, as the Task is well organized, but it's not the Operating Agent that can do all work by himself. It is till unclear whether sufficient work can and will be done on Demand Response Services.
- The milestones are **adequately** (30%) to **well stated** (70%) and are **adequately** (40%) to **most appropriate** (60%) for the planned work. The milestones are **probably** (20%) to **easily** (80%) measureable.
- The **technical and professional quality** of the Task products are considered to be **excellent** (100%).
- The **level of effort of the Experts** ranged between **adequate** (70%) to **very adequate** (30%). Although work is essentially done during meetings the quantity (and to some extent quality) of the work would be improved with more work budget in between meetings. The **level of effort of the Operating Agent(s)** ranged between **adequate** (10%) to **very adequate** (90%). One reviewer added that the Operating Agent (Jan) is a great team leader and moderator.
- The **collective expertise of Experts** with respect to the objectives ranged between **adequate** (40%) to **very adequate** (60%). There is expertise lacking on Demand Response Services. The **Operating Agent level of expertise** was considered **adequate** (10%) to **very adequate** (90%).
- The **involvement of industry (users)** is considered **appropriate** (70%) to **very appropriate** (30%). One responder stated: mainly during stakeholder meetings and

possibly through some National Implementation Activities (NIA) work. Not sure about other involvement. The **involvement of the intended users** was rated **adequate** (60%) to **very adequate** (40%). One responder said: mainly during stakeholder meetings and possibly through some National Implementation Activities (NIA) work. Not sure about other involvement.

- The **Operating Agent management** was rated **competent** (10%) to **excellent** (90%).
- 90% of the reviewers agreed that **maximum value** has been obtained from the investment in the Task. One responder stated that great value has been obtained from the money invested, but it is too early to judge if “the maximum value” has been obtained. You can always improve along with the Task activities going on.
- When asked whether the **early Task results are being used and have they had any impact**, answers ranged between **too early to judge** (20%), and **significant impact** (80%). In particular guides on Energy Contracting, Financing Options and Complete Refurbishment are being used. Maybe less the one on Tendering Recently the paper on Facilitation has been used.
- When asked whether the **early results have got to those who need them in an effective and efficient manner** the responses ranged between **too early to judge** (20%), **ineffective dissemination** (10%) and **effective dissemination** (70%). Dissemination nationally could probably be better. Dutch and French copies of some of the guides would make sense.

Recommendations

Opportunities for improvements in Task 16 - Competitive Energy Services – Phase III Energy Efficiency and Demand Response Services

1. The Task should consider whether it has sufficient expertise available to it on Demand Response Services to fulfill its remit, and if necessary consider where it could source such expertise
2. The Task should continue to consider opportunities for further dissemination of Task Outputs, particularly at the national level

The questionnaire was answered by:

7 Experts
1 Operating Agent
1 Executive Committee member

IEA Demand-Side Management Programme
Task 16 – Competitive Energy Services

Evaluation Questionnaire

Expectations **Are the expected results and expected impacts of the Task work well described in either the Task Concept Paper, Task Annex to the Implementing Agreement, or Task Work Plan?**

Answers: Acceptably described 10%
Well described 90%

Comments: None

Motives **Are the reasons to undertake this Task or why it was important to undertake this Task clearly stated in any of the above documents?**

Answers: Well stated 100%

Comments: None

Approach **Is the approach proposed to accomplish the Task work logical, appropriate, and/or well defined, in any of the above documents or as being implemented?**

Answers: Adequately described 20%
Well described 80%

Comments: None

Objectives **Are the objectives clearly stated?**

Answers: Adequately stated 20%
Well stated 80%

Comments: None

Are the objectives appropriate to the stated expectations?

Answers: Somewhat appropriate 10%
Appropriate 90%

Comments: None

In your opinion, are all of the objectives likely to be achieved when the Task is over?

Answers: Probably not 10%
Probably 60%
Definitely 30%

Comments: This depends partly on the input of national experts, the Task is well organised, but it's not the OA that can do this all by himself

It is still unclear whether sufficient work can and will be done on Demand Response Services, to my opinion.

Milestones Are the milestones clearly stated?

Answers: Adequately 30%
Well 70%

Comments: None

Are the milestones appropriate for the planned work?

Answers: Adequate 40%
Most appropriate 60%

Comments: None

Are the milestones measurable?

Answers: Probably 20%
Easily 80%

Comments: None

Quality What is the technical or professional quality of the Task products?

Answers: Excellent 100%

Comments: None

Participation Is the level of effort of the experts and the OA adequate with respect to the objectives?

Answers: **Experts**
Adequate 70%
Very adequate 30%

Comments: Although work is essentially done during meetings and quantity (and to some extent quality) of the work would be improved with more work budget in between meetings...

Operating Agent

Adequate 10%
Very adequate 90%

Comments: Jan is really a great team leader and moderator

Was the collective expertise of the experts and the OA appropriate with respect to the objectives?

Answers: **Experts**

Adequate 40%
Very adequate 60%

Comments: There is expertise lacking on Demand Response Services

Operating Agent

Adequate 10%
Very adequate 90%

Industry Is the involvement of the intended users appropriate?

Answers: Appropriate 70%
Very appropriate 30%

Comments: Mainly during stakeholder workshops and possibly through some NIA work. Not sure about other involvement...

Is the involvement of the intended users adequate?

Answers: Adequate 60%
Very adequate 40%

Comments: Mainly during stakeholder workshops and possibly through some NIA work. Not sure about other involvement...

Management How effective is the Operating Agent's management?

Answers: Competent 10%
Excellent 90%

Comments: None

Cost Effectiveness **Has the maximum value been obtained from the money invested in this Task?**

Answers: Could be improved 10%
 Yes it has 90%

Comments: I believe that a great value has been obtained from the money invested so far, but it is too early to judge if "the maximum value" has been obtained. I believe that you can always improve along with the Task activities going on.

Impact **Are the early Task results being used and have they had an impact?**

Answers: Too early to judge 20%
 Significant impact 80%

Comments: In particular guides on Energy Contracting, Financing Options en Complete Refurbishment are being used. Maybe less the one on tendering. Recently the paper on facilitation has been used.

Dissemination **Did the early results get to those who need them in an effective and efficient manner?**

Answers: Too early to judge 20%
 Ineffective dissemination 10%
 Effective dissemination 70%

Comments: Dissemination nationally could probably be better. Dutch and French copies of some guides would make sense...

AGENDA 6c. (43rd meeting of the IEA DSM Programme

Document M

Task 20 Branding of Energy Efficiency Task Status Report

Balawant Joshi, Idam Infrastructure Advisory Pvt Ltd

This Task Status Report is submitted to the ExCo meeting in Wellington with a request to:

- The Executive Committee is requested to approve the request of the Operating Agent to grant an extension for the submission of the report on Subtask 5 (Identification of Best Practices in Branding of EE) before the next Executive Committee meeting. Further, the OA will not raise any invoices on any country due to delay in the completion of the Task. The report will be ready in June 2014 and will be presented at the ExCo meeting in October 2014.

Task 20 – Branding of Energy Efficiency

Operating Agent: Balawant Joshi, Idam Infrastructure Advisory Private Limited, India

Introduction

“Branding of Energy Efficiency” was first identified as an area for new work at April 2006 Executive Committee meeting in Copenhagen. At the 31st Executive Committee meeting held in April 2008, Task 20 on Branding of Energy Efficiency was put into force.

The Task is expected to develop significant understanding of barriers associated with branding of energy efficiency and strategies to overcome those barriers. The Task was proposed with the belief that it should be possible to reverse the fortunes of energy efficiency products and services, if successful branding is achieved. Branding of energy efficiency products and services would increase their visibility and credibility.

Objectives

The Primary Objective of this Task was to ‘Develop cogent and comprehensive framework for promotion of branding of energy efficiency in electricity markets at different level of maturity’. Apart from the above mentioned main objective, need for research in the following areas was identified:

- To identify knowledge & attitude of households in developing electricity markets;
- To identify best practices in definition of suppliers of energy efficiency products and services;
- To identify the potential for energy efficiency products and services in other energy consuming sectors such as agriculture, industrial and commercial, etc.;
- To identify the potential for programmatic approach towards energy efficiency; and
- To identify the barriers to branding of energy efficiency;

Subtasks:

Following subtasks were originally identified in Task 20-Branding of Energy Efficiency.

- Subtask 1: Energy Efficiency Offerings Analysis
- Subtask 2: Energy Efficiency Consumer Analysis
- Subtask 3: Assessment of relationship between EE product pricing and maturity of electricity market
- Subtask 4: Review of branding strategies in similar areas
- Subtask 5: Identification of ‘Best Practices in Branding EE’
- Subtask 6: Communication and Outreach

As per the revised Task 20 activities, Task 20 is reduced to Subtask 5. The Subtask 5 is discussed in detail below:

Subtask 5: Identification of 'Best Practices in Branding EE'

Subtask Objective

To identify case studies and develop best practices in branding of energy efficiency and to identify role of institutional structures and government support in development of successful branding strategies.

Subtask Deliverables

A report summarising the best practices in branding of energy efficiency.

Work to be carried out

In this sub-task, survey of successful efforts in branding of energy efficiency in the participating countries as well as other countries will be undertaken. In this regard, Operating Agent will develop questionnaire and circulate the same to all the participating country experts for the development of Case Studies.

This Subtask will also help in identifying the best practices in branding of energy efficiency. The Operating Agent will undertake the following activities for the development of best practices in branding of energy efficiency: development of case studies for successful branding efforts across the globe, understand business enablers for branding in each case, identify best practice in branding of energy efficiency, identify inter linkages for different aspects of branding, identify role of institutional structures and government support in development of successful branding and identify key lessons which may be adopted in development of successful branding strategies.

Activities planned for next six months

The research for the development of 8 to 9 case studies on best practices in branding of energy efficiency is being carried out. The OA has already developed 7 detailed case studies on branding. These case studies have been identified from countries like USA, India, Europe etc. The OA is in the process of developing a couple of more case studies from participating countries. In this regard, the OA has requested country expert of Spain to share the best practices adopted by Spain in branding of energy efficiency. These case studies will be used to identify the best practices in branding of energy efficiency and will be part of the proposed report on Best Practices in Branding of EE" (Subtask 5). The OA will complete the report on Subtask 5 and circulate the draft report to participating countries by June 30, 2014 and submit the final report at the next Executive Committee meeting.

Expenditure

Original budget for the Task 20 was Euro 330400. However, same has been reduced to Euro 123 900 in the Fortieth Executive Committee meeting held on November 14 to 16 at Espoo, Finland considering the revision made in the deliverables and time frame. The Operating Agent had already submitted expenditure break up of Euro 108028 on the tasks to Executive Committee members as on March 31, 2013. As on February 14, 2014, the Operating Agent has spent around Euro 141 765 which is higher than revised budget of Euro 123900 on the Task. The details of expenditure are as given below:

Sr. No.	Item	Expenditure
1	Task Definition Phase	4 400
2	Sub Task 1	16 534
3	Sub Task 2	11 609
4	Sub Task 5	42 515
5	Administrative	56 967
6	Task Expert Meetings	9 740
	Total	141 765

Involvement of industry and other organisations:

India

Bureau of Energy Efficiency

Spain

Red Electrica de Espana

United States

Lawrence Berkeley National Laboratory,

France

ADEME

Département Marchés et Services d'Efficacité Energétique,

Reports produced in 2014

Nil

Reports planned for 2014

Name of report
Best Practices in Branding Energy Efficiency

Technology development success stories

Nil

Positioning of the Task - vs. other bodies

X

Activity Time Schedule

Subtasks	Starting date	Ending date
Subtask 5: Identification of "Best Practices in Branding EE"	2012-12-01	2014-09-30

Status of the Task:

The Operating Agent has developed 7 case studies on the best practices in branding of energy efficiency. The OA is in the process of development of couple of more case studies on best practices adopted by participating countries such as Spain. These case studies will be used to identify the best practices in branding of energy efficiency and will be part of the proposed report on Best Practices in Branding of EE (Subtask 5). As proposed the report on Subtask 5 will be ready by end of June 2014 and the same will be presented at the Executive Committee meeting in October 2014.

Issues to be considered by the Executive Committee

The Executive Committee is requested to approve the request of the Operating Agent to grant an extension for the submission of the report on Subtask 5 (Identification of Best Practices in Branding of EE) before the next Executive Committee meeting. Further, the OA will not raise any invoices on any country due to delay in the completion of the Task.

Participants

India

Bureau of Energy Efficiency

Spain

Red Electrica de Espana

United States

Department of Energy

France

ADEME

Visibility Committee Report

March 2014

Prepared by: Dr. Sea Rotmann, Chairman of the Visibility Committee

This Task Status Report is submitted to the DSM IA ExCo meeting in Wellington with a request to:

- Approve the Visibility Committee Report

DOCUMENT N

IEA DSM PROGRAMME VISIBILITY COMMITTEE REPORT

Submitted by Dr Sea Rotmann, Visibility Committee Chair and
Anne Bengtson, Executive Secretary.

Annual Report

The 2013 Annual report, including a Theme Chapter on “DSM priorities in participating countries” was made available electronically to ExCo members, Operating Agents and the EUWP and EEWP by the end of January 2014 and was uploaded to the IEA DSM website. Printed copies (280) will be sent out in March 2014 to the EUWP, EEWP, ExCo Members and Operating Agents. Executive Committee Members and Operating Agents should ensure that copies are distributed to all interested parties.

Issues

The development of the new website is stalling and needs urgent attention and input from the ExCo.

Website

All ExCo delegates and Operating Agents are strongly encouraged to review the whole website regularly, particularly areas relevant to their activities. It is very easy for information to become out-dated. Operating Agents have considerable freedom to keep their own Task areas up to date, but other feedback, reporting of functions that appear not to work and suggestions for further improvements should be made via Anne Bengtson anne.bengtson@telia.com and/or the Visibility Committee. In particular, we would be interested to know how useful the social network links are.

Statistics

Total website hits:

March ,2012 - February 2013 – 1 103 866 visitor hits

March 2013 - February 2014 – 1 279 231 visitor hits

Hits per day:

March 2012 - February 2013 – 3024 per day

March 2013 - February 2014 – 3504 per day

Average time on website:

March 2012 – February 2013 – 3 mins and 26 seconds

March 2013 – February 2014 – 3 mins and 46 seconds

Download information for Tasks – see attachments section.

Issues

Need a more detailed analysis using Google Analytics that can track/identify traffic, how long they stayed, country etc. Ask Solstice to apply Google Analytics.

Website Solstice

Solstice has not proposed any further developments but the Visibility Committee is working on tendering for an updated website, new logo and more Web 2.0 functionality.

Issues

1. We strongly welcome suggestions for further developments
2. Members should review the website regularly and update their own work/interests

Spotlight Newsletter

In 2013 four DSM Spotlight newsletters were published.

To date the following 2013 newsletters have been published and are posted on the DSM website:

- * Issue 48/ March 2013
- * Issue 49/ June 2013
- * Issue 50/ October 2013
- * Issue 51/December 2013

The next issue will be published in April 2014

Articles in Issue 48: – March 2013

- New Member: European Copper Institute
- Note from the Chairman: Energy Efficiency – Who is afraid of the M word?
- Task 24: The Netherlands holds 3rd Behaviour Change Workshop
- Centre of Excellence: DSM University in the works
- Case Study: Energy Australia Pricing Strategy Study – Australia

Articles in Issue 49 – June 2013

- Task 24: Is the Human Aspect of Energy Use Finally Becoming Interesting to Decision Makers?
- Note from the Chairman: Teaming Up
- Task 17: Providing Users Network Flexibility
- Task 23: Smart Grids and the Consumer
- These Behavioural People – Hans Nilsson

Articles in Issue 50 – October 2013

- State Grid China Hosts ESCo Manager Training on Detailed Economic Calculation and Analyses of ESCo Projects
- Note from the Chairman: The Pros and Cons of being a –Sumer
- Task 16: ESCo Project and Market Development: A Role for Facilitators to Play
- Switzerland: New Energy Strategy Turns to DSM
- Task 21: Standardisation of Energy Savings, Will the US Move Forward?
- Task 23: Assessing Risks and Rewards and the Impact on Smart Grids

Articles in Issue 51 – December 2013

- Task 16: ESCo Project and Market Development: A Role for ‘Facilitators’ to Play
- A DSM University
- Task 24: Bridging Sectors with Storytelling
- Chairman’s Note: Energy Efficiency an Economic Driver

We are grateful to all the ExCo members and OAs who have contributed articles to the Spotlight Newsletter in 2013 and hope they will continue to do so in 2014. In 2014 the Editor looks forward to highlighting not only the Task work, but also DSM work in the Member countries.

The Programme has tremendous news to share so please continue to think about, suggest and submit future articles. The Editor is happy to work with you on an article in any form – completed article by you or someone else, information for an article that you would like for the Editor to write, a conference paper that the Editor can convert into a newsletter article or just an idea that you think would make an interesting article. If you have an article to contribute, please email it to Pamela Murphy [pmurphy@kmgrp.net].

Issues

With four newsletter issues published in 2013, it is proposed that the same be done in 2014.

The proposed schedule for 2014 is:

- **Issue 52/April 2014**
 1. Articles due: February 10
- **Issue 53/June 2014**
 - a. Articles due May 10
- **Issue 54/September 2014**
 - Articles due August 10
- **Issue 55/December 2014**
 - a. Articles due November 10

Brochure

Comments on the format, style and content of the brochure and the inserts are welcome. The inserts were last updated in March 2014.

Issues

Please provide comments on the brochure and its contents at the March 2014 ExCo meeting.

Task Flyers

Task flyers need to be updated to reflect results in Phase II of Task 17 and the completion of Task 20, 21, and 22.

Social Media

The Implementing Agreement is getting more traction on social media. We now have a presence on:

- Facebook (IEA DSM Group) with 110 members and growing. Even though most posts are by Anne Bengtson, Rob Kool and Hans Nilsson, there are regularly posts and questions by other participants;

- LinkedIn (IEA DSM Group) with 37 members and slowly growing. Most posts are by Anne Bengtson and Sea Rotmann. We would need to actively invite people into this group in order to achieve the professional reach that LinkedIn could afford.
- Twitter (@IEADSM) with 181 followers and 556 tweets. This is the fastest growing social media platform and has fostered some good engagement, re-tweets and mentions. Sea Rotmann is posting for this group.
- IEA DSM Youtube Channel - needs to be populated with some relevant videos. Sea Rotmann has proposed to use some of the 60+ Task 24 videos for this channel. If we start filming some ExCo workshops, this would be a great channel to distribute visual information fast.
- IEA DSM Task 24 Expert Platform - 200+ members, invite-only (www.ieadsmtask24.ning.com). Very successful multi-media platform to distribute findings from Task 24, could be used for other Tasks, but only if they follow a similar, open dissemination strategy. Platform had 36 visits per month already, average page view for new visitors is 9 minutes 05 seconds. The platform is also linked to a dropbox, a Wiki and a Twitter account and includes 102 videos, 75 photos, 6 blog posts, over a dozen discussions, all events associated with the Task, 2 Subtask Groups and member chat and email functions and all expert's short biographies and interests.

Communications Plan and Dissemination Strategies

The Visibility Committee is currently working on a draft communications plan for the Implementing Agreement. In it, we will analyse in detail our communications history, what works and what doesn't, who our audience is and how well we service them and how we can improve our plan going forward. It will ultimately include individual Task Dissemination Strategies to ensure that the website, Spotlight newsletters and social media channels are utilised well by all Tasks to report their findings and other relevant events.

Dr Sea Rotmann
Visibility Committee Chair

Anne Bengtson
Executive Secretary

DOCUMENT O

Confirmation of the use of seed-funding for new Tasks

Prepared by Hans Nilsson

March 2014

It is recalled that the IEA DSM-Programme ExCo at its 35th meeting decided to make use of seed-funding as a means to facilitate upstarting of new tasks. The decision reads as follows (item 6 in the minutes from the meeting):

Further, the PPC should have the authority to **propose a seed-loan** to an Operating Agent that puts up a matching amount either by himself/herself or by “parent” participant (country or sponsor). The seed-loan should be part of the budget. Seed-loans will be financed by the common fund and should be agreed upon by the Executive Committee members. The amount of a seed-loan may not exceed USD 25,000 per seed-loan. If a Task is not initiated after the preparation phase, the Executive Committee’s risk will not exceed the maximum of the the seed-loan proposal.

This was a part of a decision to form a Project Preparatory Committee, PPC, that should work along guidelines as shown in the appendix below.

The ExCo is invited to confirm this decision to the use of a seed-fund as described and along the guidelines for the PPC as shown in the appendix

APPENDIX (Document presented at the 35th ExCo of the IEA DSM-Programme)

Suggestions to improve the work of the IEA DSM-Programme

1. Project guidance

Original text presented in Chester

We should appoint a “**Project preparatory Committee**”, PPC, led by one of the vice-chairs and that should hold and develop the project catalogue (planning basket) that presently is attached to the Programme Strategy.

The project catalogue should be communicated in several ways such as:

- posted on the web-site with an invitation to comment upon the project-proposal both from participants and external actors. (*Passive solicitation*)
- Sent to external actors/organisations to alert them on the opportunity to join the DSM-Programme as a participant OR to develop other ways to co-operate for a joint purpose (*Scouting and inviting*)
- Communicated into the “IEA-family”, in particular other Agreements via the EUWP-coordination groups (BCG and Electricity) and to the Secretariat to alert on expertise available (*Active solicitation*)

The PPC should suggest the use of seed money from the Common Fund to be used in the format of a loan to OA:s during the start-up phase. The loan should then be repaid as a part of the project budget when the project is decided and running. After a first reading the ExCo can allocate a budget to bring a new task, or extension of a task to maturity. This budget will be included in the final task proposal. As such the common fund would function as revolving fund.

The PPC should also act guiding and partner for the OA:s and give them assistance in developing their concept papers. The present guide for concept papers should be reviewed and possibly revised. Targeting of benefits and value of projects for different stakeholders have proved to be difficult and may need to be developed further in the concepts. A taskproposal such have standard paragraphs for external collaboration and upfront financing, a final report should have a standard analysis for work yet to be done and dissimination beyond the Exco.

It should be considered to web-base the process to develop concept papers and to get expert opinions in this process not only from face-to-face meetings but also from web-seminars (video-conferences; skype-meetings), web-comments and polling on separate and defined issues.

ExCo members should also be encouraged to use the catalogue internally in their own work (countries, companies and organisations).

Initiatives to new Tasks should be distributed before meeting in due time for members to have the possibility to express their interest and raise question/add idea's before a first reading by the ExCo.

The PPC can add topics for new Tasks, but also terminate proposals that never shape into a task.

Actions

1. **Formalise a PPC** (Project preparatory Committee) that should consist of chairs (all 3). It should be formally decided at the next ExCo. The PPC should have bimonthly meetings to discuss issues of promotion for the Programme.
2. The PPC should act as **a facilitator** to help proposed task to start and to recruit participants (including partners/entities outside the Programme and that have a limited interest in DSM per se but a dedicated interest in the subject of a task) Facilitating actions are:
 - a) **Finding and targeting participants** (internal and external) and arguing the case of task to assist the OA
 - b) **Reporting to IEA Working Parties** (EUWP and EEWP) and Coordination groups (BCG and ECG) **with a “sales pitch”** to attract interest
 - c) Assist and encourage the OA to make **“start-up” flyers** that focus on the results of the task to enable participants to see the advantages
3. **Strengthen the network of experts** (all tasks involved) and mobilise them as solicitors of new tasks. Targeted with flyers and “sales” letters.
4. **Give a seed-loan** to an OA that have a “parent” participant (country or sponsor) that puts up an equal amount. The seed-loan should be paid back once the task is up and running and the loan should be part of the budget. Seed-loans are financed from the common-fund and should be agreed upon in ExCo-meetings.
5. The PPC should propose starting a **“DSM-University”** that is based on dissemination of the Programme products and making use of the Programme expertise for training of organisations that are involved in DSM/Deployment.
6. The ExCo-meetings should have **round-table presentations of DSM-stories”** as an item at least once a year. Such round-tables should primarily be focused on issues/items in the project catalogue.

DOCUMENT P

Task ZERO - to fulfil the mission of the DSM-Programme

Prepared by Rob Kool and Hans Nilsson

The mission of the Programme is to deliver to its stakeholders, materials that are readily applicable for them in crafting and implementing policies and measures. In order to do so we have several outreach tools that we need to maintain but also develop to ensure that results are disseminated in ways that are useful for people in everyday practice. This concerns our:

- Informational tools
- Our networks and in particular the local ones run by ExCo-participants
- Dissemination and the extension with the “DSM-University”

To ensure that the activities are coherent it is proposed to see all these actions in a context that we call “Task ZERO”. A Task that is mandatory and builds on both cost-sharing and task-sharing.

<p>The ExCo is invited to discuss the report and give further suggestions and guidelines for the development and to approve the guidelines for the budget.</p>
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Task Zero

The Mission of the DSM Programme is to:

Deliver to its stakeholders, materials that are readily applicable for them in crafting and implementing policies and measures.

The Programme should also deliver knowledge and information about technology, behavioural issues and applications that either facilitate operations of energy systems or facilitate necessary market transformations.

To be able to do this the Programme, just as all other implementing agreements, needs a certain amount of administrative support. In particular such that is geared towards information with the purpose to spread results and to attract attention to the work performed.

The part of these activities that are exclusively related to a specific task is made the responsibility of the task itself and the operating agents. Another part that is aimed at a participants (country's) constituency is the obligation of the ExCo delegates. Yet another part is common and concerns general administration to keep the Programme going, general information and reporting and outreach.

This last, the common, part is paid for by the common fund and the fee that is evenly distributed over the participants. This fee has been the same (8000 USD) since the Programme started more than 20 years ago. It has been possible to keep the same fee over this long time period for several reasons. One is that the number of participants has grown and though the number has been fluctuating it peaked some years ago to 23, today we have 16 participants but expect a few more to join.

Another reason is that we have managed to be more efficient, which is very much due to the fact that we have rationalised our work since several activities have been made routine, but also that we have taken in particular IT into our services. A third reason is that the budget has been oversized from the beginning and we have managed to build a general fund of some 300 000 USD. A fund that has enabled us to start up activities with seed-funding but also buffer between years when spending has been uneven.

We now however seem to have reached the limit even when we get more participants. The last two years we have not managed to fill the fund anymore. We have a dire need to improve our web-page to modern standards. We want to target our results better to the audiences and therefore need to find new forms and improve products (the DSM University) as a way to maximize the impact of work done. And we want to make sure that all ExCo-delegates feel comfortable in their ambition to reach their own constituencies.

Therefore we should gather our resources also in a more stringent way. Some other Implementing Agreements have a common Task which is mandatory for all participants. This is very much the same as our own common fund but also has the advantage to define the obligations more stringently and to delegate responsibilities.

The purpose of such a common "Task ZERO" is to create a platform for dissemination of results from the IEA DSM-Programme in accordance with this mission.

- All participants to the IEA DSM Programme have an obligation to work for the dissemination of knowledge about the work and these common activities are covered

through the common fund. Supplementary activities within the participants own jurisdiction are necessary but covered outside the common budget.

- Present dissemination activities have been established during the work over several years and it would be practical to define the scope and ambition in the format of a task in order to enable overview and links.
- By platform is meant that several activities to disseminate results and to create interest for results should be aligned in such a way that we achieve the best possible impact. The platform should therefore comprise:
 1. Output from the IEA DSM Programme operations that aims at providing insights and transparency to the work. The main products for this are:
 - a) The Website
 - b) The Annual Report
 - c) The newsletter Spotlight
 - d) Flyers about the Programme and the Tasks
 2. Local networks to enable dissemination of results within the areas of the participants and to support them in recruiting the expertise necessary for tasks in which they have decided to participate, but also to gather material of interest for other tasks who need local points of contact for their work
 3. The “DSM-University” as a way to communicate DSM-material that is tailored to the circumstances of the receiver. The main thrust to reach a global audience are the webinars that are primarily designed for output, but may also be used for input in a way that audiences can communicate back responses, needs and wishes. The DSM-University should gradually build facilities for formal training and courses.

Responsibilities: The Programme secretary is the coordinator for task ZERO. The co-ordinator gathers together with the “visibility committee” the necessary information from those concerned with subtasks described above in order to produce a work-plan and a budget for the ExCo to decide upon annually.

Our first estimate is that we should calculate the budget share based on a number of participants to 20. The total common budget for the duties specified above can of course be a matter of considerations since it is already in part burden-sharing. We assume that the yearly contribution should be the size of 230 000 USD to be cost-shared.

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*Participants at the Executive Committee meeting 16 – 18 October 2013, Rigi-Kaltbad, Switzerland

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Task 25 – Business models for Energy Services

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