

# Mapping and Benchmarking Annex

## Work Plans and Budget

*Year May 2009 - April 2010*

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### *Task 1: Mapping*

<b>Task lead</b>	UK (Davide Minotti – DEFRA), Chair of Annex Management Committee
<b>Participating countries</b>	All countries participating in the 4E Implementing Agreement.
<b>Aim of element</b>	Provide an overview of the energy efficiency performance of electrical end-use equipment in several countries and/or regional areas and a summary of the main policy measures regarding energy efficiency of products in those areas.
<b>Products to be addressed</b>	<p>Phase 1 (first six months). The following five products (or sub-products) have been agreed by consensus among participating countries:</p> <ul style="list-style-type: none"> <li>• Domestic cold appliances</li> <li>• Televisions</li> <li>• Domestic laundry appliances</li> <li>• Domestic air conditioners</li> <li>• Laptop computers</li> </ul> <p>Phase 2 (second six months). Five additional products to be agreed by consensus for endorsement at the six monthly Exco meeting.</p> <ul style="list-style-type: none"> <li>• Integrated home networks</li> <li>• Waterheaters</li> <li>• Domestic lighting</li> <li>• Computer displays</li> <li>• AC motors<sup>1</sup></li> </ul>

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<sup>1</sup> Collection and analysis of motor information will be conducted in conjunction with the well established Electric Motor Systems Annex as a pilot for how information acquisition/analysis can be conducted with other Annexes as and when they develop.

<p><b>Deliverables</b></p>	<p>In the first year it is anticipated that ten products will be examined, with at least eight having the following information mapped based on available secondary data and presented in a form accessible to policy makers:</p> <ul style="list-style-type: none"> <li>• Energy efficiency (and other relevant performance parameters) of the worst, sales weighted average and most efficient products available in individual country and/or regional markets.</li> <li>• Best not available technology (BNAT).</li> <li>• Average efficiency of products in the stock (or park) at end-users (households, commercial sites, etc) in individual country and/or regional markets.</li> <li>• Testing/measurement methodologies used in each market place.</li> <li>• Summary of the main current, as well as envisaged or planned, policy measures.</li> </ul> <p>At least three products will be fully mapped within six months of initiation, with a further five products complete within the first year of operation.</p>
<p><b>Sub-tasks</b></p>	<p>The following sub-tasks will be undertaken for each product (<i>responsibility for activities are included in italics</i>):</p> <ol style="list-style-type: none"> <li>a. Define products and sub-product categories (<i>all participants led by Operating Agent</i>)</li> <li>b. Define framework for data collection and analysis(<i>all participants led by Operating Agent</i>)</li> <li>c. Define product performance and performance measurement data requirements (<i>all participants led by Operating Agent</i>)</li> <li>d. Develop and issue data request questionnaire to participating countries and regional contacts (<i>all participants by Operating Agent</i>)</li> <li>e. Individual follow-ups of participants, regional contacts and signposted data sources to source all available data from individual countries/regions (<i>Operating Agent</i>)</li> <li>f. Posting of source material on website where possible (<i>Operating Agent</i>)</li> <li>g. Provisional mapping of data/test methodologies/policies (<i>all participants lead by Operating Agent</i>)</li> <li>h. Circulate for comments and Review (<i>Participating Country Product ‘Champion’<sup>2</sup> and Operating Agent</i>)</li> <li>i. Submit to Annex Management Committee and Exco for review prior to placement in public domain (<i>Operating Agent</i>)</li> <li>j. Issuing of reports detailing mapping of individual products presented in a form digestible by policy makers (<i>Operating Agent</i>)</li> </ol> <p>Although all participating countries are encouraged to provide in-kind assistance to the operating agent at all stages of information collection, analysis and promotion as outlined above, it is anticipated that <i>all</i> participating countries will provide in-kind support through:</p> <ol style="list-style-type: none"> <li>k. Assisting with identifying and sourcing data</li> <li>l. Commenting on draft reports</li> <li>m. Assisting with dissemination of outcomes to key policy makers within and beyond their country</li> </ol>

<sup>2</sup> Championing to include leading review of mapping and benchmarking outputs and identify areas where further information/clarity would assist understanding and usefulness of outputs. The country providing championing for individual products to be agreed through facilitation by Annex Operating Agent or decision by the Management Committee.

<b>Budget</b>	<p><i>For each product, the following budget is estimated for the Operating Agents costs (note that although the full mapping of only eight products will be completed within the first year, all ten products will have mapping initiated. As the amount of work is variable between individual products, the budget assumes work will be completed across all ten products):</i></p> <table data-bbox="539 353 1013 526"> <tr> <td>Sub-tasks a, b, c and d</td> <td><i>3 days</i></td> </tr> <tr> <td>Sub-tasks e and f</td> <td><i>4 days</i></td> </tr> <tr> <td>Sub-task g</td> <td><i>5 days</i></td> </tr> <tr> <td>Sub-task h, i and j</td> <td><i>2 days</i></td> </tr> <tr> <td><b><i>Total</i></b></td> <td><b><i>14 days</i></b></td> </tr> </table> <p><b><i>Total for ten products</i></b>                      <b><i>140 days</i></b></p> <p><b><i>Total cost @ 700 Euro/day</i></b>                      <b><i>98,000 Euro</i></b></p>	Sub-tasks a, b, c and d	<i>3 days</i>	Sub-tasks e and f	<i>4 days</i>	Sub-task g	<i>5 days</i>	Sub-task h, i and j	<i>2 days</i>	<b><i>Total</i></b>	<b><i>14 days</i></b>
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<b>Temporary Operating Agent</b>	<p>Stuart Jeffcott: Jeffcott Associates  1 Roebuts Close  Newbury  Berkshire  RG14 7AP  Email: <a href="mailto:stuart@jeffcott.co.uk">stuart@jeffcott.co.uk</a></p>										

## Task 2: Benchmarking

<b>Task lead</b>	UK (Davide Minotti – DEFRA), Chair of Annex Management Committee
<b>Participating countries</b>	All countries participating in the 4E Implementing Agreement.
<b>Aim of element</b>	To provide benchmarking of the average and best performing products and relative sales weighted average energy performance of products, the associated policy impacts and international best practice to allow policy makers to learn from the best practice actions of their peers elsewhere thus enabling more informed policy making at the national and regional levels.
<b>Products to be addressed</b>	<p>Products will be benchmarked as they are completed by the mapping task of the Annex (assuming sufficient policy data is available). In the first year, it is anticipated that eight products will be examined, with at least six being fully benchmarked from the following list:</p> <ul style="list-style-type: none"> <li>• Domestic cold appliances</li> <li>• Televisions</li> <li>• Domestic laundry appliances</li> <li>• Domestic air conditioners</li> <li>• Laptop computers</li> <li>• Integrated home networks</li> <li>• Waterheaters</li> <li>• Domestic lighting</li> <li>• Computer displays</li> <li>• AC motors</li> </ul>
<b>Deliverables</b>	<p>It is anticipated that eight products will be examined in the first year with at least two products fully benchmarked by the end of Phase 1 (within six months of initiation), with a further four products complete within the first year of operation. For each benchmarked product, reports will provide the following data in a form suitable for application by, and promotion to, policy makers:</p> <ul style="list-style-type: none"> <li>• Relative sales weighted average and average stock (park) energy performance of products within individual countries and/or regions relative to the performance of those products elsewhere.</li> <li>• An analysis of the likely causes for differential product performance, in particular the impact of policy measures being implemented.</li> <li>• Isolation of best practice in the global market.</li> </ul>
<b>Sub-tasks</b>	<p>The following sub-tasks will be undertaken for each product (<i>responsibility for activities are included in italics</i>):</p> <ul style="list-style-type: none"> <li>n. Analysis of data to establish sales weighted average and average stock (park) of energy performance of products within individual countries and/or regions (<i>Operating Agent</i>)</li> <li>o. Analysis of data to establish differences between markets taking into account policy measures as well as other relevant factors (to be defined, but could include energy prices, competitive pressures, attention for environmentally sound behaviour, culture, etc.) (<i>Operating Agent</i>)</li> <li>p. Sourcing additional data and/or clarification on policy/cultural issues to improve initial policy analysis (<i>all participants led by Operating Agent</i>)</li> </ul>

<b>Sub-tasks cont.</b>	<p>q. Isolate policy best practice in the international marketplace (<i>Operating Agent</i>)</p> <p>r. Prepare summary reports on policy analysis and associated recommendations (<i>all participants led by Operating Agent</i>)</p> <p>s. Circulate for comment (<i>all participants lead by Operating Agent Product Champion<sup>3</sup></i>)</p> <p>t. Submit to Annex Management Committee and Exco for review prior to placement in public domain (<i>Operating Agent</i>)</p> <p>u. Issuing of reports on policy analysis and associated recommendations for individual products presented in a form digestible by policy makers (<i>Operating Agent</i>)</p> <p>These tasks will be implemented by the Operating Agent, although participating countries will be encouraged to provide in-kind support whenever possible.</p>																		
<b>Budget</b>	<p><i>For each product, the following budget is estimated for the Operating Agents costs (note that although the full benchmarking of only six products will be completed within the first year, eight products will have benchmarking initiated. As the amount of work is variable between individual products, the budget assumes work will be completed across all eight products):</i></p> <table data-bbox="475 779 1013 1086"> <tr> <td>Sub-tasks n and o</td> <td><i>2 days</i></td> </tr> <tr> <td>Sub-task p</td> <td><i>1 days</i></td> </tr> <tr> <td>Sub-tasks q, r and s</td> <td><i>3 days</i></td> </tr> <tr> <td>Sub-tasks t and u</td> <td><i>1 days</i></td> </tr> <tr> <td><b>Total</b></td> <td><b><i>7 days</i></b></td> </tr> <tr> <td> </td> <td></td> </tr> <tr> <td><b>Total for eight products</b></td> <td><b><i>56 days</i></b></td> </tr> <tr> <td> </td> <td></td> </tr> <tr> <td><b>Total cost @ 700 Euro/day</b></td> <td><b><i>39,200 Euro</i></b></td> </tr> </table>	Sub-tasks n and o	<i>2 days</i>	Sub-task p	<i>1 days</i>	Sub-tasks q, r and s	<i>3 days</i>	Sub-tasks t and u	<i>1 days</i>	<b>Total</b>	<b><i>7 days</i></b>	 		<b>Total for eight products</b>	<b><i>56 days</i></b>	 		<b>Total cost @ 700 Euro/day</b>	<b><i>39,200 Euro</i></b>
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### ***Task 3: Communications, Management and Reporting***

<b>Task lead</b>	UK (Davide Minotti – DEFRA), Chair of Annex Management Committee
<b>Participating countries</b>	All countries participating in the 4E Implementing Agreement.
<b>Aim of element</b>	To provide best practice project communications, management and reporting for the Annex, and to facilitate effective promotion and dissemination of the results from the Annex.
<b>Deliverables</b>	<p>The element will deliver the following:</p> <ul style="list-style-type: none"> <li>• Quarterly newsletters including project progress (open publication) and financial reporting (available to Annex participants and signatories to the Implementing Agreement only).</li> <li>• Annex website including all available reports, source data and associated links.</li> <li>• Biennial reporting to the Exco.</li> </ul> <p>The Task will also provide ad hoc management recommendations. In the first year this will include reports on:</p> <ul style="list-style-type: none"> <li>• The potential and cost implications of sourcing data from wider stakeholder/geographical sources</li> <li>• The potential, costs and benefits of expanding communications to engage wider stakeholder groups</li> </ul>
<b>Sub-tasks</b>	<p>The following tasks will be undertaken by the Operating Agent Team:</p> <ul style="list-style-type: none"> <li>v. Appoint Regional team members.</li> <li>w. Develop Annex website.</li> <li>x. Ongoing management and population of website.</li> <li>y. Develop dissemination templates (e.g. newsletters).</li> <li>z. Prepare and issue quarterly project progress and financial reporting newsletters.</li> <li>aa. Quarterly online/video conference meetings with participating country representatives.</li> <li>bb. Preparation for, and attendance at, biennial Exco meetings.</li> <li>cc. Ongoing communications and reporting to IEA Secretariat</li> <li>dd. Preparation of reports on <ul style="list-style-type: none"> <li>○ The potential and cost implications of sourcing data from wider stakeholder/geographical sources</li> <li>○ The potential, costs and benefits of expanding communications to engage wider stakeholder groups</li> </ul> </li> </ul>

<b>Budget</b>	<p>The following budget is estimated for the Operating Agents costs:</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 60%;"></th> <th style="width: 20%;"></th> <th style="width: 20%; text-align: right;"><i>Direct Costs</i></th> </tr> </thead> <tbody> <tr> <td>Task v</td> <td style="text-align: center;"><i>1 days</i></td> <td></td> </tr> <tr> <td>Tasks w and x</td> <td style="text-align: center;"><i>2 days</i></td> <td style="text-align: right;"><i>12,000 Euro</i></td> </tr> <tr> <td>Tasks y and z</td> <td style="text-align: center;"><i>5 days</i></td> <td></td> </tr> <tr> <td>Task aa</td> <td style="text-align: center;"><i>4 days</i></td> <td style="text-align: right;"><i>1,500 Euro</i></td> </tr> <tr> <td>Task bb</td> <td style="text-align: center;"><i>8 days</i></td> <td style="text-align: right;"><i>3,000 Euro</i></td> </tr> <tr> <td>Task cc</td> <td style="text-align: center;"><i>2 days</i></td> <td></td> </tr> <tr> <td>Task dd</td> <td style="text-align: center;"><i>6 days</i></td> <td></td> </tr> <tr> <td style="text-align: center;"><b><i>Total</i></b></td> <td style="text-align: center;"><b><i>28 days</i></b></td> <td style="text-align: right;"><b><i>16,500 Euro</i></b></td> </tr> <tr> <td></td> <td style="text-align: center;"><b><i>Total cost @ 700 Euro/day</i></b></td> <td style="text-align: right;"><b><i>19,600 Euro</i></b></td> </tr> </tbody> </table>			<i>Direct Costs</i>	Task v	<i>1 days</i>		Tasks w and x	<i>2 days</i>	<i>12,000 Euro</i>	Tasks y and z	<i>5 days</i>		Task aa	<i>4 days</i>	<i>1,500 Euro</i>	Task bb	<i>8 days</i>	<i>3,000 Euro</i>	Task cc	<i>2 days</i>		Task dd	<i>6 days</i>		<b><i>Total</i></b>	<b><i>28 days</i></b>	<b><i>16,500 Euro</i></b>		<b><i>Total cost @ 700 Euro/day</i></b>	<b><i>19,600 Euro</i></b>
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