



SAVE ENERGY
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SAVE ENERGY

Energy Efficiency Observatory

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1 Introduction

The “Save Energy” project is an important tool to assist future generations to understand the importance of reducing energy consumption.

The project’s Work Plan is divided into 9 Work Packages, aiming to address the project’s specific objectives and mitigate the potential risks resulting from its long duration.

The first Work Package consists of a group of seven tasks (1.1 to 1.7) that direct project activities, providing the concepts and tools for the development of the remaining Work Packages. In particular, Work Package 1 features the introduction of two structures that will have a fundamental role in guiding and advising the project team throughout the duration of the project – the project’s Advisory Board and the Energy Efficiency Observatory. This document focuses on the latter – the Energy Efficiency Observatory.¹

As set out in the Technical Annex, the 5th task of Work Package 1 is the establishment of the Observatory: *“The aim of the task is to establish a Task Force within the consortium with expertise in energy. This task force will be supported by desk research of monitoring activities along with the results of the activities of external integration with projects best practices/policies/communities. The gathered information is analyzed and processed before being distributed amongst the consortium and will public domain.”*

In this document it is provided the Observatory Function Plan as well as the methodology for its implementation.

¹ The Advisory Board is set up in project document D1.1 – SAVE ENERGY Vision.

2 Observatory

The Observatory is designed to be a structure within the Save Energy Consortium Team that will be responsible for updating the partnership with the latest developments on energy efficiency policies, concepts and technology.

2.1 Mission and Objectives

The aim of the Observatory is to provide the Save Energy partners with the latest *information* on “Energy Efficiency” in order to enrich the Save Energy outputs.

The Observatory’s **Mission** can be defined as follows:

“The Energy Efficiency Observatory mission is to gather, organize and disseminate information concerning Energy Efficiency within the “Save Energy” partners.”

This mission can be achieved through meeting the following **objectives**:

- O.1. To select the relevant, updated and reliable information that should be disseminated to the Save Energy consortium partners;
- O.2. To ensure that the information reaches all partners in an effective manner.

2.2 Work Methodology

A well-defined set of activities are required to achieve the above noted objectives, and so ensure the reliable and pertinent information will flow during the project.

Based on the defined objectives, the following three main activities have been developed:

Table 1 – Observatory Activities

Objective	Activity	Description
O.1.	Data Collection	In this activity, the Observatory will define the type of information to be identified. Data Collection Guidelines for the Observatory will be created in order to provide orientation during the information search.
O.1.	Data Treatment	In this activity, the Observatory will review, validate, classify and archive the information gathered during the previous activity.
O.3.	Data Dissemination	In this activity, the Observatory will disseminate the relevant information within the consortium.

Figure 1 illustrates the information must flow within the “Save Energy” Consortium.

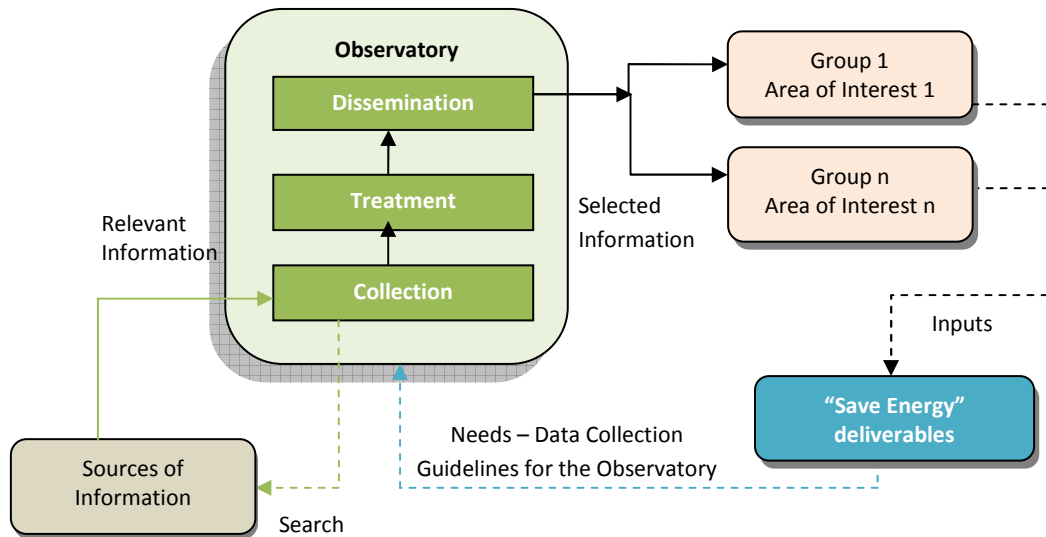


Figure 1 – Scheme of Observatory Work Methodology

The Save Energy deliverables will drive the information search activity conducted by the Observatory. The Observatory team will collect available information on relevant matters from reliable sources and process and make it easily accessible. The processed information will be sent to the deliverable developers.

It is clear in this methodology that the definition of the Areas of Interest in which information will be collected is a key component for the successful operation of the Observatory.

A work methodology has been created to provide guidance to the operation of the Observatory, as well as the rules to be followed to ensure the most effective information flow.

2.3 Activities description

Each activity is divided into tasks to guarantee efficient operation and easy monitoring.

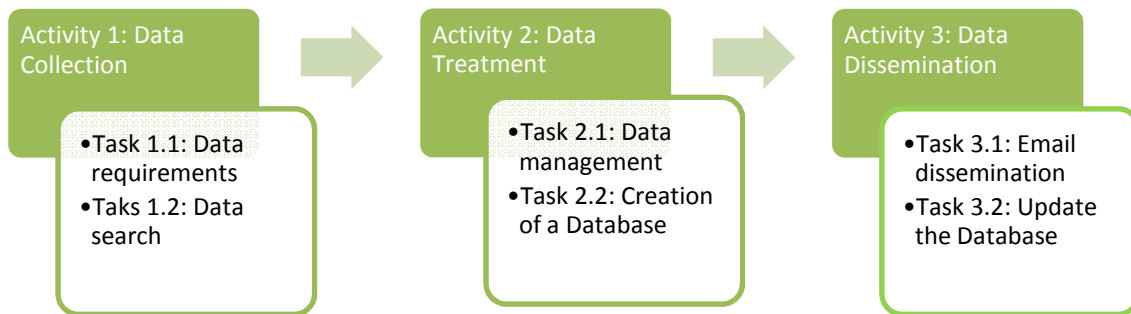


Figure 2 – Observatory Activities and Tasks

2.3.1 Activity 1: Data Collection

2.3.1.1 Task 1.1: Data Requirements

The data to be collected must be of use to in the development of the project's different outputs. Consequently, it is necessary to gain a precise understanding of the information needed to produce the deliverables. Information sources include, for instance, papers, book chapters, abstracts and full descriptions of research projects, etc. that might provide relevant contents for the development of the project.

A preliminary list of relevant energy-related topics and sources will be provided by the Observatory team on information that will most likely assist in the elaboration of project deliverables. This list will be finalised in the Data Collection Guidelines for the Observatory.

- **Data Collection Guidelines for the Observatory**

The Data Collection Guidelines will include the Type of information, Thematic Area, Source and Geographical scope that the Observatory team will have in consideration when collecting the information.

All partners are welcome to provide suggestions for topics. For instance, with regard to the project Pilots, it might be useful to collect documentation on Energy Consumption Profiles in a specific country. Therefore, the partners responsible for the pilot would emphasise the need for this information and integrate it in the Data Collection Guidelines for the Observatory.

To operate this, the Observatory team has developed an information request form (see FORM A in Annex), so that consortium members can contribute. This form can be completed and uploaded onto the platform whenever a partner registered on the portal believes it is relevant to do so, allowing the consortium to review and update the Data Collection Guidelines though the virtual platform.

Elements in the form can be altered, added or removed in order to facilitate the work and improve the efficiency of the information collection process. In addition, lessons learned by the Observatory team will also be incorporated in the Data Collection Guidelines for the Observatory.

2.3.1.2 Task 1.2: Data Search

After the development of the Data Collection Guidelines for the Observatory, the Data Search task will be undertaken.

Five main methods will be used for the data searching:

- Internet research by the Observatory Team
- Participation in Energy Efficiency workshops, seminars and other events, in support of WP8 activities
- Subscription of selected databases and newsletters by the Observatory Team
- Partner inputs and recommendations
- Participation of all partners in conferences and seminars

2.3.2 Activity 2: Data treatment

In Activity 2, the Observatory team will systemise and organise all the data gathered in the previous activity.

2.3.2.1 Task 2.1: Data management

A Template Form will be completed for each information research activity conducted. This form will represent the **ID card** of every piece of information collected and will be available to consortium members and public on a secure and constantly updated database via the Observatory portal.

Three categories of information will be created to classify the gathered data:

- Data sources: information sources used in the Data search;
- Publications: documents containing relevant information ;
- Events: description of Energy Efficient events relevant to the project, including date, location, speakers and title and abstract.

- **ID Cards**

Elements for the “Data Sources” ID card:

- Name of the Source
- Geographical Scope
- Keywords
- Description
- Attachment
- Last Update

Elements for the “Publication” ID card:

- Name of the Document
- Date of Publication
- Keywords
- Abstract (Meeting agenda, etc.)
- Attachment
- Last Update

Elements for the “Events” ID card:

- Event Name
- Date
- Location
- Keywords
- Description
- Attachment
- Last Update

2.3.2.2 Task 2.2: Creation of a Database

Information collected by the Observatory team will be stored in the form of ID cards in a database. The database will be available for public consultation and the information presented will serve to generate relevant discussion generated from that will be open to the general public through blog(s) and forum(s) to be integrated in the website.

As defined in the proposal, the Save Energy project includes the development of a web 2.0 website where this database will be hosted and available for consultation by the public.

2.3.3 Activity 3: Data Dissemination

After collecting, classifying, organising and archiving the data, the following step is to make it available to the deliverable developers and the public domain.

2.3.3.1 Task 3.1: Email Dissemination

The Observatory team will distribute information to consortium partners through a range of different Groups of Interest, established according to the areas of expertise/interest of each partner.

- **Groups of Interest**

The deliverable developers will be included in Groups of Interest to ensure the data is sent to a target audience for whom it is genuinely relevant. Thus, Thematic Area identified by the Observatory team, based on in the Data Collection Guidelines for the Observatory, will be associated to a list of individuals.

Each member is free to select the Groups of Interest that they want to belong when registering on the Portal (Please see Annex Members registration)

The Groups of Interest in which each partner is incorporated will determine the type of information they will receive on monthly basis via e-mail, as well as the alert messages prompted by new posts in relevant forums or, possibly, keywords in relevant blog posts.

2.3.3.2 Task 3.2: Update the database

The Database will be updated on a monthly base. The Observatory team will introduce new cards on the database and/or revise the older ones.

2.4 Monitoring

Regular monitoring will be implemented to evaluate whether the objectives of the Observatory are being achieved. A list of relevant indicators has been created with the objective of analysing and controlling the performance of the Observatory. The indicators are as follows.

Table 2 – Monitoring Indicators

Items	Level of partners satisfaction		
All thematic areas relevant to the “Save energy” project are covered	1 – Not satisfied	2 – Fairly satisfied	3 - Satisfied
The information reaches the Groups of Interest	1 – Not satisfied	2 – Fairly satisfied	3 - Satisfied
The information is relevant to the Groups of Interest	1 – Not satisfied	2 – Fairly satisfied	3 - Satisfied
The information reaches the Groups of Interest in due time	1 – Not satisfied	2 – Fairly satisfied	3 - Satisfied
The information is well classified and contains all the necessary data	1 – Not satisfied	2 – Fairly satisfied	3 - Satisfied

These indicators should be measured every 6 months. The levels of satisfaction obtained by the measurements will determine the actions to be taken to mitigate eventual shortcomings, as specified below:

- 1 – Not satisfied – Need to review the Data Collection Guidelines for the Observatory
- 2 – Fairly satisfied – Need to review the procedure of the activity
- 3 – Satisfied – No action required

To obtain the members level of satisfaction, a satisfaction inquiry will be available every 6 month on the Observatory Portal.

2.5 Setting-Up a Web-Based Interaction

Since communication and most of the Observatory’s work will be performed at a distance, it is important to set up a virtual infrastructure capable of supporting all activities associated to the Observatory’s functioning.

The Observatory webpage will exist within the Save Energy website and will make full use of its Web 2.0 tools to adequately serve its purpose. The main objectives of the virtual structure will be to facilitate communication between the Observatory team and the rest of the consortium team, and to provide simple and quick dissemination of the Observatory’s work.

Although not a focus of the Observatory, access to the Observatory webpage will be available to the general public. Project team members will have privileged access to particular

applications, through means of a password system, which will allow them to interact with Observatory members to request for feedback and information.

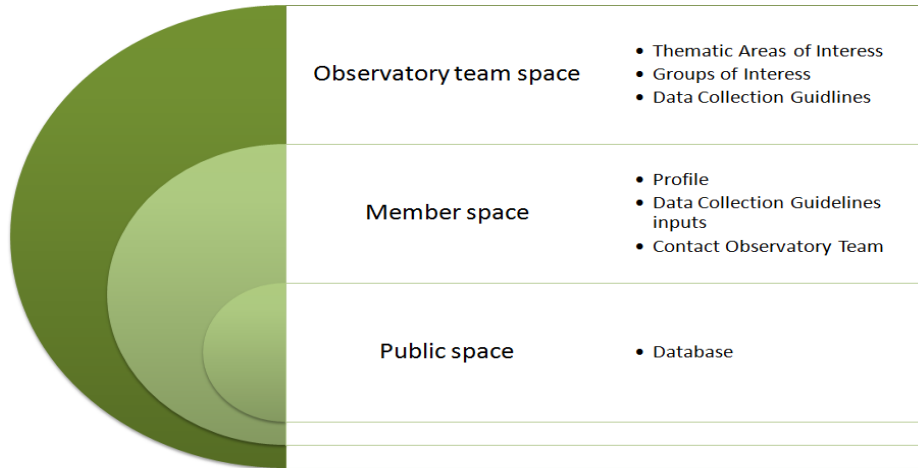


Figure 3 – Map for Energy Efficiency Observatory portal

This work is being developed in partnership with Alfamicro, as it controls the web portal. The content’s actualization and management of the portal will be the Observatory’s team responsibility.

2.5.1 Public Space

On this web space the database will be available for the public, organized in ID cards.

2.5.2 Members Space

All partners will be invited to log in to the Observatory Portal. A password will be provided to each partner, and a profile will be requested with information about Groups of Interest.

From this point on the member:

- can access to the database;
- will receive monthly information gathered by the observatory to the Group of interest he/she assigned;
- Can suggest new data collections guidelines from Form A;
- Answer to the “Satisfaction inquiry”;
- Can contact the Observatory Team.

2.5.3 Observatory Team Space

The Observatory team will be responsible for:

- Registering new members including them on the Groups of Interests;
- Updating the Data Collections Guidelines;
- Updating the Groups of Interests;
- Updating the database;
- Sending ID Cards to the Groups of Interests;
- Answering members requests;
- Analysing Satisfaction inquiries and take actions to mitigate eventual shortcomings.

2.6 Team

The Observatory's organisational team diagram – designed to ensure an efficient routine and regular monitoring scheme for the Observatory – is illustrated in Figure 4:

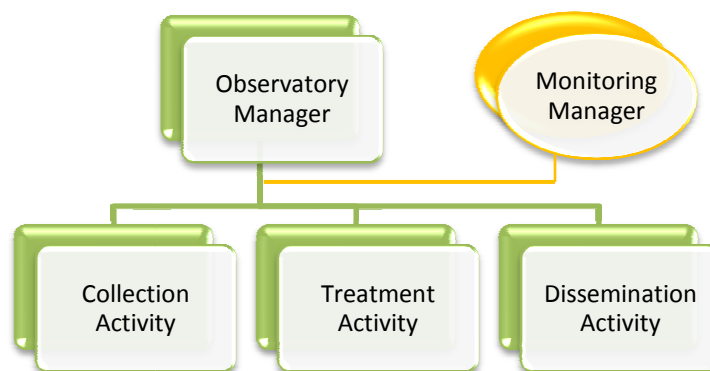


Figure 4 – Team organisational diagram

Table 3 indicates the profile and Person months per month required for each activity.

Table 3 -Team Profile and time resources

Role	Activities description	Profile	Person months per month
Observatory Manager	Management of daily problems and representation of the observatory within the consortium.	High sense of responsibility and good communication	0,1
Monitoring Manager	Monitoring the activities	Knowledge of monitoring techniques	0,05
Collection Activity	Development of Activity 1	Organised and methodical	0,1
Treatment Activity	Development of Activity 2	Organised and methodical	0,1
Dissemination Activity	Development of Activity 3	Organised and methodical	0,1

Based on the profile established above for each role, the Observatory must be composed of three individuals:

- Douglas Thompson will be the Observatory manager. He will communicate with the consortium partners.
- Bárbara Veloso will be responsible for the Observatory monitoring tasks.
- Inês Luís will develop Activities 1, 2 and 3, being the “back office” person.

The Observatory team is led by Douglas Thompson. He is an experienced economic consultant for SPI, having advised numerous private sector and public sector clients in a range of industries around the world. He has provided extensive mathematical, econometric and statistical analysis for clients, including benchmarking and market development studies. Douglas Thompson has provided energy sector projects in many areas – including advising on energy company strategy in the UK, assessing renewable energy support over a 10-year period, advising regulators on electricity issues, forecasting energy demand and prices, and modeling energy export potential. He has provided many projects to assess household utility demand around the world.

Bárbara Veloso will provide the monitoring activities requested. Bárbara Veloso has acquired significant expertise in leading teams, managing projects, both in a technical and financial perspective, and formulating business development strategies. She has also undertaken substantial training in Finance, Management and Leadership.

The day-to-day activities of the Observatory will be responsibility of Inês Luis. She focuses on developing innovation and R&D analysis for clients. Inês Luís holds a degree in Chemical Engineering from Lisbon’s Technical University.

2.7 Resources

Apart from time and server space, no other resources are expected to be allocated to Observatory-related activities.

2.8 Schedule

The Observatory will initiate its formal activities on 1 October 2009. The implementation schedule is as follows.



Table 4 – Implementation schedule

Task	Date	Partners involved
Collection of initial information and definition of Groups of Interest for Data Collection Guidelines	1 st to 15 th September	SPI
Setting-Up a Web-Based Interaction	15 st to 30 th September	SPI, Alfamicro
Log in to web portal completing the profile	1 st October	All consortium members

Based on the defined methodology, a schedule for the Observatory activities has been created:

Table 5 – Observatory activities schedule

Month	Mar-09	Abr-09	Mai-09	Jun-09	Jul-09	Ago-09	Set-09	Out-09	Nov-09	Dez-09	Jan-10	Fev-10	Mar-10	Abr-10	Mai-10	Jun-10	Jul-10	Ago-10	Set-10	Out-10	Nov-10	Dez-10	Jan-11	Fev-11	Mar-11	Abr-11	Mai-11	Jun-11	Jul-11	Ago-11
Implementation																														
Data Collection Guidelines																														
Inscription of members																														
Update Data Collection's Guidelines																														
Data Search																														
Information Treatment																														
Archive																														
Dissemination																														
Monitoring																														

-  Activities that include all partners
-  Activities of the Observatory

3 Initial Inputs

3.1 Initial Data Collection Guidelines for the Observatory

Type of information

- Legislation
- Initiatives and Projects
- Publications and Reports
- Statistics
- Workshops, conferences and seminars
- Technology
- Networks, associations and public bodies

Thematic Areas

- Energy efficient building design
- Energy conservation
- Sustainable energy
- Energy efficient appliances
- Energy audit

Sources

- Europe's Energy Profile <http://www.energy.eu/>
- International Energy Agency
http://www.iea.org/Textbase/subjectqueries/keyresult.asp?KEYWORD_ID=4122

Geographical Scope

- Europe
- Worldwide

3.2 Groups of interests

A total of 12 Groups of Interest have been defined:

Table 6 – Groups of Interest

Groups	
A1	Legislation
A2	Initiatives and Projects
A3	Publications and Reports
A4	Statistics
A5	Workshops, conferences and seminars
A6	Technology
A7	Networks, associations and public bodies
A8	Energy efficient building design
A9	Energy conservation
A10	Sustainable energy
A11	Energy efficient appliances
A12	Energy audit

4 Conclusion

The Save Energy Observatory is a task force which will execute a series of well defined activities and tasks in order to gather and disseminate relevant information among the consortium. Simultaneously, Observatory operations will be monitored in order to maintain the schedule and efficiency of the work. The Observatory will start operating on 1 October 2009 and will have continuous activity.

5 Annex

5.1 Members registration

Members Registration

Your inputs will be considered for definition of Groups of Interests for dissemination of relevant information within the Save Energy Project.

1. Can you please provide us with your general information?

Partner Identification:	
Organization:	
Name of contact person in the organization:	
E-mail:	
Tasks in Work Packages:	

2. Can you please select witch areas are you interested in obtaining information?

	Groups	Selection
A1	Legislation	
A2	Initiatives and Projects	
A3	Publications and Reports	
A4	Statistics	
A5	Workshops, conferences and seminars	
A6	Technology	
A7	Networks, associations and public bodies	
A8	Energy efficient building design	
A9	Energy conservation	
A10	Sustainable energy	
A11	Energy efficient appliances	
A12	Energy audit	

5.2 Form A

Data Collection Guidelines: Input from Consortium Partners

Your inputs will be considered for the elaboration of the Data Collection Guidelines within the Save Energy Project.

1. Concerning the theme “Energy Efficiency in Buildings”, which are the thematic areas of interest for your organization, taking into account your tasks in the “Save Energy” project?

Thematic area 1

Thematic area 2

Thematic area 3

Others

2. Taking into account your know-how on “Energy Efficiency in Buildings”, could you please indicate sources of interest in the following table?

Type of information	Thematic Area	Source	Geographical scope

You can submit your form. Thanks for your cooperation!