

Intelligent Energy – Europe (IEE)

Annex I

Description of the Action

Full title of the project: Partnership Energy Planning as a tool for realising European Sustainable Energy Communities

Acronym of the project: PEPSEEC

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Abstract

PEPESEC supports the development of sustainable energy communities by increasing the role of local community planning in developing a more efficient supply, distribution and use of renewal energy sources (RES) and conventional energy, demand-side management and associated mobility.

It will achieve this through improved energy planning methodologies which will be further developed by innovative techniques to facilitate the involvement of citizens, politicians, market actors and other stakeholders in more effective delivery of energy planning.

Results are improved impacts and outcomes in terms of the significant economic, social and environmental benefits of developing a low-carbon economy and shaping a sustainable energy community in the participating city-regions: Greater Manchester, Manchester and Oldham (two core municipalities in the Greater Manchester metropolitan city-region), Malmo and Murcia (both focusing on two local communities within the city-region), Genoa, Amaroussion (the largest municipality within the Athens metropolitan city-region), Thessaloniki and Katowice.

Summary

PEPESEC will support the emergence of European sustainable energy communities through increasing the use of local community planning for the efficient supply, distribution and use of RES and conventional energy, demand-side management and associated mobility.

It will achieve this through **widening the use of existing best practice energy planning methodologies** (from Sweden and wider EU) **and further develop these through the addition of innovative techniques** to facilitate the involvement of citizens, politicians, market actors and other stakeholders whose buy-in and actions are required for effective plan delivery.

Current energy planning methodologies do not employ a truly holistic approach to engaging all necessary stakeholders. The ensuing plans are therefore vulnerable to significant change by dominant political and economic pressures. This leads to a significant gap between aspiration, need and delivery in this area. This is particularly evident in EU states where energy planning is not a statutory requirement of city regional planning authorities (e.g. UK).

EU states, municipalities and associated stakeholders are also at different levels of understanding and experience in undertaking energy planning. This barrier to effective engagement and buy-in has reduced the effectiveness of energy plan delivery.

Through PEPSEEC stakeholders' needs and aspirations will be accounted for, utilising an effective and transparent **vision-led approach to engagement**. This vision-led approach will promote the significant economic, social and environmental benefits of developing a low-carbon economy and shaping a sustainable energy community.

Innovation will be significant feature of the engagement process through marrying the best of LA21/Sustainable Community Strategy learning with latest tools and techniques for multi-stakeholder strategic plan development (e.g. OpenStrategy™, PLANIT-NW etc.) PEPSEEC will also trial the deployment of new and appropriate digital technology and techniques in the engagement process, to advance best practice in energy planning.

PEPESEC will therefore contribute across Europe to:

- Reducing atmospheric emissions of carbon dioxide, sulphur, nitrous oxide and hydrocarbons
- Reducing dependency on fossil fuels
- Increasing the use of renewable energy and biofuels
- Increasing energy efficiency and energy resource management
- Improving competitiveness.
- Further development of the environmental (energy) economy

- Enhancing the framework for the take-up of low carbon technologies

This will be achieved by:

- Evaluating successful best practice approaches to energy planning at city regional level
- Increasing key stakeholder understanding of the socio-economic and environmental benefits of energy planning at city-regional level.
- Developing energy plans in participating communities
- Showcasing innovation through intelligent systems making use of digital technologies
- Establishing and disseminating energy planning best practice guidance across Europe.

PEPESEC will deliver:

- A suite of 9 energy plans from participating European municipalities, modular in nature for adaptation and transfer trans-nationally
- An understanding of skills sets required by key professionals, politicians and wider stakeholders in effectively participate in energy planning
- Increased understanding of wider professional, politicians and wider stakeholders in wider EU of ‘why, what and how to’ energy plan
- Increased capacity of key professionals, politicians and wider stakeholders with participating and observer municipalities
- Practical examples of how intelligent systems can be made more accessible and useable through imaginative uses of digital technologies
- Best Practice Guidance on Development of City Regional Energy Plans

1. Objectives of the Action

(a) Objectives of the action

The project will develop and monitor the implementation of intelligent energy strategies at a municipal level in city-regions in the participating Members States, with one New Member State partner. The project aims to provide an exchange mechanism for transferable good practice across all the participating city-regions. This will cover:

1. New approaches to energy planning at city regional level:

- Integrating energy planning and socio-economic planning to shape the development of a vibrant low-carbon economy
- Identifying transferable and adaptable methodologies for multi-stakeholder strategic development
- Analysing critical success factors in the development and implementation of effective energy plans
- Developing new knowledge and skill sets required by stakeholder groups as part of capacity building approaches to widen engagement with effective energy planning

2. Supporting and consolidating the emergence of sustainable energy communities across Europe:

- Increasing the level of local community engagement in energy planning and implementation
- Developing social capital to improve understanding of the economic and social benefits to be gained from energy planning
- Establishing a trans-European network of city-regions involved in the development of sustainable energy communities

- Developing energy plans in 9 participating communities
- Establishing and disseminating sustainable energy planning best practice guidance across Europe

3. Developing new methodologies which are adaptable to diverse socio-economic environments across Europe

- Identifying success factors in more advanced energy planning methodologies being used by city-regions, e.g. in Sweden, and ways of using this experience and expertise to support developing energy plans in city-regions in other parts of Europe, (both transitional – EU15 e.g. Greece and Spain and in new member states, e.g. Poland)
- Evaluating innovative regeneration partnership models being used by city-regions in previous Objective 2 areas, e.g. in the UK and Italy, transferring experience to other EU city-regions focusing on ways to develop more integrated approaches by linking up support for sustainable energy communities with wider social inclusion initiatives;
- Developing new business models which can be used as a benchmark for enhancing competitiveness and the quality of life, especially in Objective 1 areas, and making the creation of sustainable energy communities more accessible and relevant to these areas

4. Dissemination and networking of innovative practice across European city-regions

- Linking up intelligent energy strategies with appropriate information society (IS) initiatives to provide new and innovative solutions to supporting the development of sustainable energy communities
- Developing new IS applications to support citizens, businesses and public agencies in preparing intelligent energy solutions which are more accessible, easy to the use and transparent and, as a result, make more of an impact, especially in the most densely populated areas of Europe, i.e. city-regions, where carbon production is most extensive and where socio-economic conditions, especially social exclusion, make it especially problematic to develop sustainable energy communities
- Cascading learning from the project in order to generate greater stakeholder engagement in the development of sustainable energy communities

The intended outcomes of this approach are as follows:

- Developing a suite of energy plans, together with supporting methodologies, which are modular in nature and adaptable and transferable on a trans-European basis;
- Increasing the capacity of key professionals, decision-makers, including politicians, and wider stakeholders within the participating city-regions
- Producing best practice guidance and a ‘tool-kit’ on the development of city-region energy plans and sustainable energy communities;
- Increasing the understanding of stakeholders at all levels, especially key decision makers, of the ‘why, when and how to’ of sustainable energy planning and, consequently, their commitment to making it happen.

2 (b) State of the art

Energy planning with the EU is well advanced in states such as Sweden where the ‘law on municipal energy planning’ requires local authorities to prepare and monitor the implementation of energy plans.

This Swedish model of energy planning articulates how energy is supplied, distributed and used within a defined municipality and covers all types of energy needs - transport, heating, electricity specifically for domestic and industrial use. It also describes the current energy flow rate from production to consumption, the resources used to generate and transport energy, sectors that are the final consumers of this energy, and a description of its impact on the environment. The plan is developed with the involvement of all groups within society that are integral to its delivery. Plans need to be approved by the Council’s elected representatives, as the highest decision-making body. Strong motivation within consumers and producers of energy is necessary so that during the process the correct decisions

PEPESEC will look to evaluate this Swedish model of energy planning and adapt it to the local conditions of all participating municipalities.

Such best-practice methodologies for energy planning will be further developed in the area of engagement techniques, with a view to boost the involvement of major energy users, wider public/private sector users and well as citizens and community representatives in defining the plan.

The need for this project approach includes:

- Lack of clear plans for implementation of EU and national energy policies at City Regional Level
- Current inconsistent Energy Planning approaches and patchy uptake by city-regions across EU states
- Municipalities without effective energy plans (including lack of political, public, private, voluntary and community sector), often revert to the line of least resistance to focus on small scale, organisational and domestic actions. This has resulted in a vicious circle, with agencies undertaking the same actions as they always done, whilst hoping for a different result. The step change required to deliver on EU sustainable energy policies and move to a pro-active strategic (and high output) approach is all too often seen as too difficult or complex.
- Disconnectedness of Energy Planning from Economic and Social Planning at city-regional level.
- City-regional approaches to transport provision, waste management and economic planning have evolved significantly over recent decades and are now seen as mainstream functions within municipalities. This is not the case with energy planning.
- Lack of effective energy planning has led to a failure to provide a long term commitment to RUE/RES investment. Market confidence in this sector is subject to significant fluctuations and often tracks changing trends in national subsidy for RUE/RES measure and technologies.

Development of state of the art techniques to improving engagement and buy-in of all stakeholders will start with evaluation of transferable engagement methodologies and techniques.

This will include examination of approaches to engagement undertaken in developing Local Agenda 21 Action Plans and Sustainable Community strategies across participating municipalities and wider EU. Learning will also collated from EU-funded projects as outlined in 2.c) below.

Engagement tools targeting multi-stakeholder groups will also be assessed for adaptation and incorporation into the PEPSEEC methodology. Examples for assessment include:

PLANIT-NW (developed by the North West Regional Assembly, UK)

- This is a computer-based ‘learning simulation’ to raise awareness within strategic partnerships regarding planning for sustainable development
- Such a simulation is aimed at showing the interconnectedness of policy areas and the need for effective co-operation across sectors to minimise policy conflicts and maximise opportunities.
- Such assessment might recommend development of an energy-specific learning simulation. In the UK DEFRA has funded the development of the waste-specific simulation entitled PLANIT-Waste.

OpenStrategy

- OpenStrategy is a methodology, developed in New Zealand, for strategic planning in a multi-stakeholder environment
- It is focused on linking customer demand to agency actions and results.
- Information in the OpenStrategy system is entered by the stakeholders themselves, and again the focus is on involving both the delivery agencies such as local authorities, but also (and most crucially) the recipients of these services, as they are the ones who will primarily define how services will be used, and which benefits they wish realised.

The PEPSEEC project will also be considering how intelligent systems based on innovative applications of Information Society Technologies (ISTs) can now offer city-regions the possibility of fully integrated services from both the administrative and technical point of view. The available technology and the understanding and efficient use of it have matured over the last decade to the point that has had allowed ambitious goals. There is now a clear vision of a single, integrated IST environment that underlies all aspects of life and covers most of the requirements of citizens, businesses and administrations. The global research community has, to a large extent, completed the first step, namely the integration of hardware. This has been achieved through developments such as ISO OSI and the standards built on it. Current state of the art is focused on ways of developing open and accessible Internet (IP) based systems that enable users to connect to networks, use e-services and exchange information regardless of the architecture of their computer. The next step is the integration of and interoperability of applications that enable the realisation of a more ubiquitous “Ambient Intelligence” as identified as a “foundation” of the current Framework Programme for IST.

The PEPSEEC project aims to demonstrate how integrated IST environments can create ‘intelligent ecosystems’ enabling applications to co-exist and interact and support more innovative and accessible solutions to energy planning, management and user engagement. This includes specific examples of IS applications being used to support the development of intelligent energy networks, including through linking ‘smart homes’ and other ‘intelligent buildings’ together to create ‘intelligent neighbourhoods’ and ‘intelligent city-regions’, e.g. support by GRID networked applications. The project will also address issues of Intellectual Property Rights (IPR) and the various innovative solutions that are developing to ensure that IPR protection is balanced with the requirements for interoperability, open systems and open source software, e.g. through collaborative copyright frameworks such as “Creative Commons”.

The various technologies that are needed for the realisation of this vision already exist and have reached the necessary level of maturity that allows their integrated use for the creation of this environment. The applications need intelligence, communication means, and codes. This project recognises the important role of Internet and eGovernment standards such as XML, XSL, IPv6, SOAP, eGIF/EIF and the work of the EU program, Interchange of Data between Administrations, (IDA), and will take into account the ongoing work to develop these standards.

This project will demonstrate how new types of ‘intelligent environment’ can enable those engaged in energy planning and the development of sustainable energy communities to realise more accessible and effective systems for managing change. At the same time the project will highlight how these

‘intelligent systems’ can be used to engage users, especially citizens, and stimulate interest in, and commitment to, sustainable energy, including learning about matters that concern them in this area and making more informed decisions.

PEPESEC proposes to assess, adapt, and utilise transferable engagement methodologies for use in energy planning. Learning from this process will be captured in best practice guidance/toolkit to enable trans-national applicability throughout the EU.

The assessment of the skill sets required by energy planning practitioners and wider stakeholders to enable successful energy plan development will be undertaken. In the UK the EGAN Review – Skills for Sustainable Communities has identified the skill sets required to enable sustainable development. Similar assessment for energy planning will provide valuable learning and innovation and shape team planning, training and development in this area.

2 (c) Link(s) to other initiatives

GM Climate Change Agency

In the UK, PEPESec will be directly linked to the development of a city-regional Climate Change agency for Greater Manchester. Business plans have already been developed for the merging of the two Energy efficiency advice centres (EEACs) in one body and to be combined with the ‘Manchester is my Planet’ sustainable energy initiative. The new White Paper on Local Government (Oct 2006) recognises the importance of city regions in this regard, which DEFRA is keen to develop.

EIE-05-125 - Sustainable Energy Communities in Urban Areas in Europe (SECURE)

With Malmo as a key partner in both SECURE and PEPESec it is hope to share learning and in particular demonstrate uptake of learning from the sub-city scale development of sustainable energy action plans underway through SECURE.

EIE-05-217 - Co-operation between communities for Energy Action Plans WISE-PLANS

With partners in Spain, UK, Sweden and Italy this project (which started in January 2006) has synergies with PEPESec, but at the scale of smaller urban centre and rural/agricultural districts. Learning can be shared between PEPESec and WISE-PLANS in particular on methods of engaging with communities.

EIE/05/188 - 3-NITY 3-fold initiative for Energy Planning and Sustainable Development at Local Level

Also with partners in UK and Greece this project will have learning to share with PEPESec, again focused at the sub-city scale.

Multiplying Sustainable Energy Communities - A Blueprint for Action (MUSEC)

This forthcoming IEE project will have much to share with PEPESec. The city-regional scale of PEPESec will have additional learning and knowledge to transfer to MUSEC.

#4.1030-Z-02-159 Renewable Energy Acceptance by Local Communities:

REAL-COM

This ALTENER-funded project (Oldham MBC was one of the partners) focused on engaging with stakeholders to overcome barriers to the deployment of RES. This project developed the REP-TOOL (Renewable Energy Planning Tool) to assist planners and policy makers in gaining an appreciation of the scale of output of RES against unit costs per MWh. Learning from this has informed the thinking behind the shaping of engagement strategies.

No actions in PEPESec, not even partly, are, have been or will be co-financed by any other Community programme.

2. Expected Results and Potential Impacts

(a) Direct outcomes that you want to achieve by the end of the duration of the action

The most significant outcomes will be:

1. Providing scalable and transferable examples of how new approaches to energy planning at city regional level can enhance the impact of energy saving policies and practices, including:
 - Taking the experience gained in the Swedish context and using this to deploy new approaches to capacity building and engagement in each of the project's city-regions with the aim of increasing the engagement of local citizens and NGOs in local energy planning;
 - Comparing and contrasting the opportunities and challenges that this presents for implementing common European approaches to energy saving in diverse city-regions as represented by the project partners;
 - Enabling the participating city-regions to accelerate both the scale and scope of their energy planning and to use the added value gained from the project network to enhance the quality of both the planning process and the resulting plan itself;
 - Identifying and disseminating best practice examples of what works best (and what does not) to be part of a 'toolkit' to be used by other city-regions;
 - Establishing innovative learning models to provide improved collaborative tools for increasing the knowledge base on energy saving and the development of sustainable energy communities on a more effective basis.

2. Increasing the scale and scope of emerging sustainable energy communities (SEC) by promoting more holistic approaches to SEC support frameworks and methodologies, including:
 - Increasing political engagement in SEC development in city-regions by working to establish a SEC Forum in each of the participating city-regions bringing together senior decision makers, professional actors (including those directly involved in the PEPESec project), NGOs and citizen representatives;
 - Using the SEC Forum in each city-region to evaluate the levels of public/political acceptability and behavioural change required to overcome barriers to increasing the political commitment to SEC development and the acceptance of the need to implement energy saving policies and practices;
 - Using the increased levels of stakeholder engagement achieved through the SEC Forums to improve the energy planning process and to extend their plans to cover wider issues, e.g. mobility, in greater depth;
 - Developing proposals for increasing social capital through innovative community engagement approaches to provide a more effective legacy of citizen engagement in SEC development, both directly and through representative bodies including NGOs, social partners and social economy enterprises;
 - Creating new synergies between SEC development and local strategic frameworks for planning and regeneration and preparing ways to ensure that these frameworks recognise the importance of energy saving and energy planning and work towards more integrated approaches for strategic development and practical implementation.

3. Creating new SEC support frameworks and methodologies which are flexible enough to be fully adaptable to the diversity of the socio-economic environments across Europe, including:
 - Identifying and evaluating new business models that are emerging and assessing how effective they could be in terms of being transferable to other socio-economic environments in Europe as represented by the project partners;

- Establishing an initial knowledge base around the issues identified by partners in the preparation of the project, including innovative market development and financing mechanisms, including: regulatory issues, EESCOS, carbon trading, competition across energy markets, barriers to distributed generation, private owned energy companies and services, community owned and operated energy companies, direct market testing and market incentives and tariffs;
 - Using this knowledge base to prepare a scenario building methodology to assess technical and resource constraints and opportunities in each of the partner city-regions which, once refined, would be added to the project ‘toolkit’ for potential deployment to city-regions across Europe, issues identified by project partners to date include: energy networks and grid managements, grid computing and intelligent interfaces, matching supply and demand, grid infrastructure, future energy scenarios, supply chains;
 - Developing the knowledge base so that it is of direct practical use at a local level in the participating city-regions by having the ‘toolkit’ available to local partners and stakeholders and helping them to use it to improve the energy planning process, including covering more issues, more effectively and more rapidly than would otherwise be the case;
 - Working in partnership with Eurocities and other appropriate trans-European networks representing city-regions to test out the readiness/willingness of other city-regions to utilise this methodology in developing new approaches to energy saving/planning and SEC development.
4. Establishing new synergies between innovative practice in intelligent energy strategies and approaches to information society development, including:
- Undertaking an assessment of IS applications that are available to be used to support intelligent energy networks such as applications for ‘smart homes’ and ‘intelligent buildings’ and the deployment of GRID networked applications;
 - Developing greater awareness of the challenges involved in dealing with the potential climate impact of the information society and its rapidly increasing use of ISTs, including new energy saving approaches to the development and deployment of GRID based infrastructures, equipment and applications;
 - Identifying existing best practice in this area, developing a specialist part of the project knowledge base dedicated to this and then using this to prepare specific scenario building methodologies to assess the scalability and transferability of these applications to the project’s city-regions;
 - Developing a specialist web-based ‘toolkit’ on IS applications for SEC development.

(b) Potential impacts of the action – in case of a broader scale of implementation as well as in the longer run after the end of your project/contract

The aim of this action is to move energy planning into the mainstream of city regional planning for the participating municipalities and to act as a guide to others to replicate through the EU.

In doing so it is planned to gain greater engagement, involvement and buy-in of politicians, economic and social planners and communities than current energy planning methodologies typically deliver.

This increased knowledge, understanding boost the intellectual capacity of key stakeholders to make well informed decisions at both city regional and organisational scale.

The project intends to highlight a number of specific potential impacts of this action which it is hoped have to potential to make a much wider impact in the longer term. In terms of the participating city-regions the intended project impact is that they are able to enhance their ability to use the experience and expertise of the network and its partners to increase their own capacity for energy planning

resulting in their ability to accelerate the process and produce a more comprehensive and inclusive plan than would otherwise have been the case.

This increased capacity would include:

- a) Making use of more imaginative ways to increase citizen awareness of the issues and then to engage citizens in practical ways to secure energy saving and to build SECs, both directly and through the many representative organisations, especially NGOs, that exist at local level and which often have more effective ways of communicating with citizens than traditional institutions;
- b) Developing new and innovative ways of securing energy saving by incentivising behaviour change through new business models which make a positive business case for this change, including local carbon trading, market incentives and social economy models;
- c) Taking advantage of more holistic approaches by linking together energy planning more closely with local strategic frameworks for planning/regeneration and information society development;
- d) Taking a more proactive approach to technological innovation by highlighting how IS technologies and applications can be used to promote energy saving, e.g. ‘smart homes’ + ‘intelligent buildings’ = ‘smart ways of living’ and how to develop the information society on a carbon neutral basis.

The UK Government’s Stern Review on the Economics of Climate Change (October 2006) clearly identifies the economic imperative and opportunities of mitigating the effects of climate change. PEPSEEC will clearly position Energy Planning as key element of economic planning process in terms of resource efficiency and market growth opportunity.

Whilst implementation of the Energy Plans may commence during the project lifetime it will be in the immediate years after project completion that the energy plans effects will be felt as key decisions in terms of RUE/RES deployment and market development can expand under a plan with full commitment of key stakeholders and decision makers.

This is the basis on which the project intends to build up its methodology, knowledge base and practice so that it will be able to quantify the energy saving resulting from improved energy planning and SEC development in the participating city-regions. It is intended that this will then be the basis for extrapolating what would be possible with the approach being scalable and transferable to other city-regions in the longer run after the end of the project.

3. Target Groups and Key Actors

The target groups for the project include:

- City-region managers, planners and administrators: ensuring that the key professionals are engaged and motivated to support energy planning and the development of sustainable energy communities;
- Regeneration partnerships, e.g. housing market renewal initiatives: providing a ‘bridge’ between the key professionals and the citizens and businesses who live and work in specific geographical locations where economic restructuring and social exclusion are often most acute;
- Senior decision makers and politicians in city-regions: providing an opportunity to engage with strategic decision making and ensuring that this is motivated to offer the required support for work in this area;
- Energy and utility companies and related SME supply chains: identifying both barriers to, and opportunities, for change through the development of new business models and financial mechanisms which will promote sustainable energy planning;

- Citizens initiatives aimed at developing sustainable communities and associated NGOs: finding new and innovative ways of engaging with citizens and involving them both at a strategic level and in the practical implementation of sustainable energy planning;
- Research institutes and programmes working in partnership with local/regional actors: providing access to the advanced knowledge base in this area and leveraging in their support for sustainable energy planning.

The key actors will be:

- a) city-region strategic decision-makers, including politicians, who will need to be engaged and committed to this process if it is to be successful: each of the participating city-regions has discussed the preparation of the project at this level and has secured the highest level of political commitment to this work. All of the lead partner cities (Manchester, Malmo and Genoa) and most of the other core partners are members of Eurocities and its associated forums and this will enable the project to use the Eurocities network (100+ city-regions) for dissemination ;
- b) professionals in planning, environmental and energy management and economic development: all members of the preparation group for the proposal work in one or more of these fields and each project partner will commit a representative at the appropriate level to be directly involved in the project, including dissemination;
- c) businesses involved in energy supply, distribution and management: the partners are engaged in dialogue with businesses in their city-regions and this has helped to shape the proposal. This will include major energy users groups, chambers of commerce and regional groups (e.g. North West Energy Council, UK). It is proposed to set up a Business Advisory Group to support the project and to engage key players and supply chains in the project's work. In addition Manchester City Council has a partnership with Cisco in developing IST applications to support its work on "Intelligent Cities" development and this will support specific work on 'intelligent systems' for the built environment and new IST applications;
- d) community based partnerships, e.g. the UK Local Strategic Partnerships, which offer the opportunity to engage with citizen based initiatives and organisations. The project has directly involved members of the LSP arrangements in the UK and intends to use this as a model of citizen engagement to share with other partners and to be part of the dissemination process.

4. Contribution to Energy-Related Policies as well as other EU policies and Community Added Value

The project addresses key elements of the Lisbon Strategy in terms of the Key Actions focusing on support for "Knowledge and Innovation". There is significant economic, environmental and employment potential in **environmental, energy-efficient and renewable energy technologies**. The project will be supporting, therefore, the EU's commitment to step up its promotion of the development and application of environmental technologies and the uptake of eco-innovations, in particular through the Environmental Technologies Action Plan - ETAP8, where this will be supported by increased research and technology dissemination efforts on the one hand, and through public and private investments via the Structural Funds and the European Investment Bank on the other, notably to promote low-carbon technologies.

The project also addresses the following:

- The EC Green Paper on "A European Strategy for Sustainable, Competitive and Secure Energy";
- The EC Communications on "Impact Assessment on the Green Paper on Energy Efficiency" and "Action Plan on Energy Efficiency";
- The forthcoming EC "Strategic Energy Review".

- Anticipates the actions outlined in the 7th Framework Programme (2007 – 2013) under the Energy theme as well and the Environment (including climate change theme).
- Directive 2003/30/EC on promotion of the use of biofuels and other renewable fuels for transport Renewable Energy Directive (2001/77/EC), which aims to increase the amount of energy from renewable energy in the EU.

The project aims to add value to Europe by developing a more holistic approach to the development of sustainable energy communities which will create synergy with related initiatives aimed at promoting social inclusion, technological innovation and competitiveness. In doing so the aim is to open up and widen the scope of intelligent energy strategies and ensure that they become more accessible, transparent and sustainable.

The project aims to achieve this based on bringing together the international state-of-the-art not only in intelligent energy solutions but also in information society (IS) solutions and wider approaches to regeneration and social inclusion. This will also assist the communities involved in working towards ambitious targets for improving the existing levels of RES and RUE and provide a means of measuring the progress made.

In addition, by involving communities across Europe with different levels of expertise in sustainable energy planning, the overall level of expertise in the sector will be increased. The environmental impacts of implementing the strategies will be monitored and linked together with the work on new and innovative approaches for community engagement and participation to develop a more robust and transparent assessment of socio-economic impacts.

5. Participant List

Partic N°	Participant name	Participant short name	Country code	Main Role in Consortium
1 (CO)	Manchester City Council	MCC	GB	Project Management
2	Manchester Knowledge Capital	KC	GB	Knowledge Exchange
3	Oldham MBC	OMBC	GB	Project review
4	City of Malmo	CM	SE	Action Planning
5	Skane Energy Agency	SEA	SE	Energy Planning
6	City of Genoa	CG	IT	Action Planning
7	City of Murcia	MUR	ES	Evaluation
8	Municipality of Amaroussion	AMA	GR	Intelligent Systems
9	City of Thessaloniki	CT	GR	Dissemination
10	Exallon	EX	GR	Dissemination
11	ISD – Institute for Sustainable Development	ISD	PL	Evaluation
12	FEWE – Polish Foundation for Energy Efficiency	FEWE	PL	Energy Planning

6. Work Programme

6.1 Overview

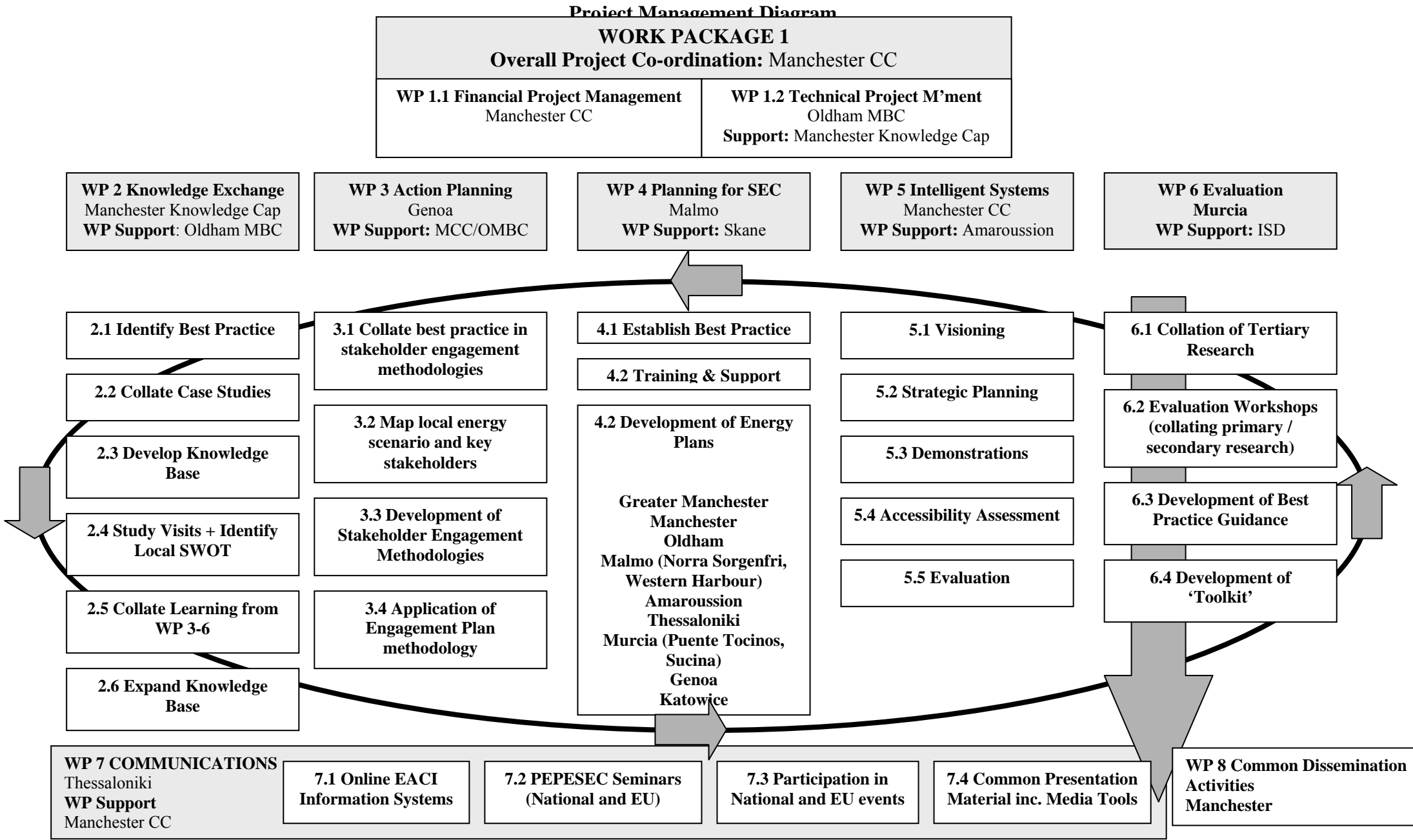
The Work Packages have been designed to support the core objectives of the project in terms of:

- a) establishing an effective knowledge exchange which will enable partners to share best practice and develop a greater collective understanding of how this can be used to support the development of new and innovative forms of energy planning and sustainable energy communities and then use this increased capacity to enhance the planning process with the result of producing higher quality energy plans (WP2);
- b) achieving higher and more dynamic levels of partner engagement through the development of action planning and pilot actions in the partner city regions which will link the knowledge exchange activity into practical delivery through partner and stakeholder engagement to realise sustainable energy communities with improved planning processes and enhanced energy plans (WP3);
- c) developing improved and more effective energy planning strategies which will support the emergence of sustainable energy communities based on increasing the impact of local community planning for more efficient uses of renewable energy sources, conventional energy, demand side management and associated mobility. This will draw out lessons from the pilot actions and highlight further examples of good practice that can be used directly by the project partners to improve their planning process and the resultant energy plans while at the same time being more generally scalable and transferable (WP4). This will include identifying business models which can be used as a benchmark for new and improved ways of harnessing market mechanisms to support energy planning and the development of sustainable energy communities, especially in less favoured regions, including Objective 1 regions in the EU15 and the new Member States ;
- d) developing new and more innovative approaches to energy planning by utilising intelligent systems, through innovative applications of Information Society technologies (ISTs), which can support both improved decision making and the engagement of citizens and businesses in the development of sustainable energy communities (WP5);

This approach will be backed up by effective project management (WP1), evaluation (WP6), communications (WP7) and common dissemination (WP8).

The methodology is based on the knowledge exchange work (WP2) creating the first iteration of the project's knowledge base which will be used to plan the pilot actions (WP3). The results of the initial work on partner/stakeholder engagement from the pilot actions will be used to create a framework for the development of energy planning strategies (WP4). At the same time intelligent systems based on ISTs (WP5) will be factored into a second iteration of the project's knowledge base and the second phase of the pilot actions, as outlined below.

An important part of the methodology for achieving this will be the case studies and the study visits to be undertaken as part of WP2. The study visits are intended to enable representatives from the participant city-regions to study at first hand the experiences, both good practice and challenges, of each of the other partners. The objective is to support the creation of a transferable knowledge base based on real time observations and discourse 'in the field' as well as on the other forms of information exchange which the project will utilise.



RISK MANAGEMENT –Table of Risk Management Analysis

Risk Description	Likelihood	Impact	Overall Risk	Timing	Risk Owner	Comment: What can be done to reduce risk or what contingency plans will be in place?
1: Lack of organisational capacity / stakeholder commitment / staffing	Low	Medium	Low	Would be evident in early stages	MCC working in partnership with Knowledge Capital and Oldham MBC.	Having a robust and ongoing methodology for risk assessment at all levels of the project with reports to monthly project management board meetings.
2: Cost Overrun	Low	Medium	Low	Would be identified in monthly and/or quarterly monitoring	As above	As above and with contingency plans being in place to address and manage risk throughout the lifetime of the project, including through monthly financial monitoring.
3: Failure to achieve outputs	Low	Medium	Low	Would be identified in monthly and/or quarterly monitoring	MCC and Oldham MBC through review programme	Ensure regular monthly updates on progress towards achieving outputs to project management board and a quarterly review of cumulative achievements.
5: Timescales ~ delays and slippage	Low	Low	Low	As above	MCC	Ongoing review of progress reported to monthly project management meetings backed up with quarterly review.
6: Match funding does not materialise	Low	Low	Low	Would be evident in early stages	MCC, working in partnership with OMBC.	Included in monthly monitoring reports with requirements for contingency plans to seek alternative sources.
7: External issues (e.g. weather / planning / consents / property etc)	Low	Low	Low	Would be evident in early stages	MCC through review programme	Included in monthly monitoring procedures.
8: Environmental risks (eg failure to meet environmental legislation, risk of flooding, Environmental Impact Assessment)	Low	Low	Low	Would be evident in early stages	MCC through review programme	Included in monthly monitoring procedures.
9: Other risks relevant to the project: Availability of technology	Low	Medium	Low	Would be evident in early stages	MCC	Included in monthly monitoring procedures.

6.2 Work Packages

6.2.1 Work Package 1: Management

N° of work package: 1	Name of the work package: Project Management
Duration in months: 30	Leader of the work package: City of Manchester

Description of the work

Overview:

The primary role of WP1 will be the effective design, set-up and roll out of project management processes in the early phases of the project. The majority of the effort in this work package will therefore be used to establish effective project management approaches at the start of the project and embed these in the working practices and approaches of all parties involved.

Once the establishment of the roles, processes, structures and approach have been completed, a Project Office will be put in place by MCC, as WP Leader, to manage and monitor the rest of the project lifecycle working in partnership with Oldham MBC as WP Deputy Leader. These arrangements will be reviewed regularly as part of the MCC Quality Assurance process to ensure project management standards are consistently being met. All other project partners will participate in this work package through the Project Management Committee and the agreed Advisory Boards.

Tasks:

1. Design and Set-up

The design and set-up phase is estimated to take three months. During this period, the following tasks will be undertaken:

- **Governance Structure and decision-making processes:** Design and implementation of the project governance structures for control, co-ordination and decision making purposes. This will involve defining membership and roles and responsibilities of a Project Management Committee together with a Research Advisory Board and a Business Advisory Board.
- **Project Planning Process:** During the initial phase of the project, the Project Management work package team will facilitate a co-ordinated planning process involving all work packages. The detailed work package plans will be integrated into an overall project plan for the first 18 months of the project. Key interdependencies will be identified, responsibilities for managing these defined and a critical path analysis undertaken. The project plan will be maintained on an appropriate project management system.
- **Project Management Processes and Reporting Standards:** All reporting formats for work package level, project level and commission level relating to project management will be designed. These will include work package scoping documents, progress reporting, deliverable sign offs etc. The reporting formats for project meetings will be developed along with common templates for agendas, meeting notes. The reporting schedules will be determined and integrated with meeting schedules.
- **Communications and Dissemination:** The project management work package team will liaise with the Communications and Dissemination work package team to provide guidance on the requirements for Project Management related communications mechanisms.

- **Initial Risk Assessment:** A risk assessment exercise will be undertaken based on the baseline project plan to evaluate the potential risks. The risks will be quantified and prioritised, with mitigation strategies and actions developed and assigned. An on-going risk management process will be developed and implemented.
- **Financial Control:** Financial control processes will be developed for project accounting (including budgeting, cost commitment, delivery, payment), financial reporting, and financial auditing. These processes will be consistent with the requirements of 'IEE Programme.'
- **Review and evaluation process:** A project evaluation and QA process will be designed, agreed and implemented to provide continuous review and advice on compliance to project management processes, controls standards and a broader assessment of project risks. The evaluation will use a structured approach based on good practice principles.

2. On-going Project Management

Once the structures, processes and tools have been set up, the Coordination Office will manage and monitor the project management activities throughout the project. These will include the following:

- **Planning:** These are activities that will maintain and update existing plans as well as co-ordinating the new detailed plans emerging from the work packages. Proposed activities include:
 - Continuous updating and maintenance of the project plan to reflect actual progress and any detailed plans developed as deliverables from the work packages
 - Co-ordinating a 12-monthly planning cycle to review the current project plan and to develop the integrated plan for the next 18 months
 - On-going management and monitoring of the critical path analysis and project
- **Executing:** These are the activities that support the execution of the programme plan, which include:
 - Co-ordinating the review and sign-off process for deliverables from the work packages
 - Tracking the success of the portfolio in achieving the project's goals and objectives
 - Monthly consolidation of work package progress and performances
 - Preparing the reports to the Project Management Committee and Advisory Boards and Commission
 - Monthly reconciliation of actual financial spend against forecasts
- **Control:** This would involve identifying, managing and reporting on the project risks, issues, conflicts, changes and performance. Typical activities would include exception reporting of risks, issues, and conflicts and managing the resolutions and communication of the corrective actions agreed, and managing the change control process and co-ordinating change requests resulting in agreed changes to the scope.

3. Quality Assurance

Throughout the project, various quality control mechanisms will be in place to ensure that good practice project management standards and processes are utilised, from the set-up through to the actual project management itself, covering:

- The Coordination Office at MCC-MDDA will be working with Oldham MBC who will establish a project review team, utilising the expertise of their European Team, to provide a monitoring and review service for all project partners. The deputy role of Oldham MBC will help further manage delegated responsibilities to the project

partners, while ensuring compliance with the review structures put in place. This will be supported by Manchester Knowledge Capital providing additional professional expertise on strategic energy policy issues to ensure that the project management process can monitor performance and delivery effectively in relation to the required outcomes of the project overall;

- On-going advice, quality assurance and project management supervision will be provided by MCC for the duration of the project, post the design and set-up phase. This will take the form of periodic management reviews and audits providing feedback on compliance with agreed project management standards and assessment of project risks.

Outcome of this work package:

Effective project management, performance and delivery. The project governance structures and processes would be fully operational within three months of the project starting, backed up with overview and supervision provided by the Coordination Office run by MCC.

Deliverable(s) of this work package:

D1.1 - A project governance structure design outlining: the project structure, roles and responsibilities of the Project Management Committee; roles and responsibilities of Project Leader and Deputies, and Work Package Leaders; decision making processes and conflict resolution process; meeting schedules and terms of reference. (T0+3)

D1.2 – An initial project plan for the first 18 months, including critical path analysis, log of key interdependencies and the initial risk management plan. (T0+3)

**Post the initial project plan developed, project plan updates will be produced on a regular basis by the Project Office

D1.3 – A Project Management Handbook defining all project management processes, including planning, monitoring and reporting processes and templates, as well as standards and processes around financial, change control, conflict and risk and issue management. Also, determination of requirements for project management related communications as input to the Communications work package. This deliverable would also include the project governance design as above. (T0+2)

**This will also include requirements and content for project management awareness and training on the Project Management Handbook.

D1.4 – Establishment, resourcing and training of the Project Office to provide the necessary on-going project management support. (T0+3)

**The Project Office will produce regular reports which will include: progress and performance reports for the Project Management Committee, Advisory Boards and European Commission/EACI; Control related reports, such as those that relate to conflict, risk and issue resolution and change control.

D1.5 – A revised integrated project plan including plans for the next 18 months will be produced on a 12 monthly cycle. (T+12)

D1.6 – Quality Review and Evaluation reports and good practice advice on-going throughout the project – to be provided on a regular basis, revised every six months, and to be co-ordinated as an input for Management Committee Meetings. (T0+6) (T0+12) (T0+18) (T0+24)

D1.7 – Website development plan and management plan for webtools

Role and contribution (tasks) of each partner in this work package:

Participant	Role & Contribution	Task N°/ Sub-task n°
City of Manchester – Manchester Digital Development Agency (MDDA)	Strategic management of project including development of the webtools, a full description of which is given in WP7, this will include the design and set up of the governance structure of the project and the project management arrangements, including monitoring and quality assurance procedures, regular reporting and maintenance of the central project office.	Tasks 1, 2, 3.2
Oldham MBC – European Team	Project review team which will support the project office in providing a monitoring and review service for all project partners including the collection and collation of monitoring data	Task 3.1
Knowledge Capital;	Strategic advisor to Coordination Office and to Project review team on energy issues drawing upon their expertise on renewable energy and sustainability.	Tasks 3.1 and 3.2
Malmo; SEA; Genoa; Murcia; Amaroussion; Exallon, Thessaloniki; ISD FEWE	Each of the other project partners will be members of the Project Management Committee, attending project management and other appropriate meetings and contributing to the ongoing monitoring and review process. Task allocations have been made on the basis of an equitable balance of commitments from all project partners to providing the central project office with data and local monitoring reports on progress at a local level on an ongoing basis.	Tasks 1 and 3

Major other specific costs (tasks and foreseen amount):

Development of webtools and Intranet/Extranet for project management and dissemination – 50,000 Euro. These are described in full in WP7 but they have been costed as part of the delivery of WP1 as they will be a strategic asset for the project. Additional content for the webtools will be produced as a result of related activities in WP2 and WP7.

Major subcontracts (tasks and foreseen amount, and name of organisation where available):

The sub-contractors identified / to be identified were / will be selected following the provisions of Article II.9 of the Grant Agreement on competitive grounds on the basis of best value for money.

6.2.2 Work Package 2: Knowledge exchange: identifying, analysing and sharing expertise

N° of work package: 2	Name of the work package: Knowledge Exchange
Duration in months: 6 (M3-M9)	Leader of the work package: Manchester Knowledge Capital

Description of the work

Overview:

The role of WP2 is to create a knowledge base drawn from the experience and expertise of the partners which will highlight best practice, as well as challenges and barriers, in terms of new approaches to energy planning at city region level. The knowledge base will be used to identify key issues which will then be prioritised in order to form the basis of the first set of pilot actions to be developed in WP3. This will be led by the Manchester Knowledge Capital Partnership with support from Genoa with a sub-contract to Eurocities, as a not-for-profit public network, which will work with the lead partners to develop the core knowledge base linked to its role in supporting the dissemination work of the project, as outlined in WP7.

The proposed knowledge base would be a repository for current European best practice in participatory community energy planning. It would provide a single centre where existing best practice collated during the initial phase of the PEPESec project would be archived. New knowledge developed during the project would be added to the knowledge base including the experiences gained from international workshops, study visits and the proceedings from the project conferences. Learning materials and best practice guidance developed during the project would be added to the Knowledge base. Partners and other European stakeholders involved in energy planning would be encouraged to add their work to the knowledge base.

During the project national, regional and local energy agencies, universities and energy research centres would be informed about the existence of the knowledge base and an organisation identified to act as the long term host/secretariat for the knowledge base after the end of the project.

Tasks:

1. To identify best practice and the key challenges and barriers faced by partners in developing energy planning and wider strategic planning to support sustainable energy communities and the ways that this can be used to improve energy planning processes in the participating city-regions and to enhance the scope and scale of the resultant energy plans;
2. To collect and collate case studies from partners and to identify commonalities in these in order to enable them to be used by the participating city-regions to improve their energy planning and on a wider trans-European basis;
3. To create the first iteration of the knowledge base, using the web based tools provided by the MDDA (as part of WP1), and to use this to inform the project partners responsible for WP3 in order to support them in the planning of the pilot actions in each participating partner city region;
4. To organise the first phase of study visits to each partner city region to expand the case studies for the knowledge base;
5. To collect and collate the results of the pilot actions in each participating partner city region in order to extend the knowledge base;
6. To create the second iteration of the knowledge base, using the results from further study visits, workshops and the work on business planning (WP5) and intelligent systems (WP6).

Outcome of this work package:

a) Knowledge base:

The creation of a knowledge base that the project and its partners can utilise to plan and implement the pilot actions (as in WP4). This aims to ensure that the project has an effective methodology for capturing and analysing evidence from city regions at three levels:

- a) through the collection and analysis of existing data from partner city-regions;
- b) through the project's intervention in seeking new examples and reference data which project partners will seek out during the course of the project and particularly during the nine months which will be the main focus of WP2 (M3-M11);
- c) through the study visits and workshops which will be held in each of the partner city-regions.

The data collection aims to create a case study matrix which will cluster together examples of good practice and challenges being dealt with in each of the participating city-regions. The project will establish an initial template of issues which each partner will be asked to provide examples of both existing and projected practice plus an opportunity to identify additional issues which add to and/or complement the initial list on the template. It is important that this is an iterative process. Although the project has established an initial list of priorities drawn from consultation with partners to date, it is not intended that this should be an exclusive list. The template is intended to be added to during the course of the project although the main focus will be the nine months of WP2. Each partner will have the opportunity to add case studies to the existing list as well as to suggest additional topics and request additional input from other partners on these topics. Initially 18 topics have been identified as follows:

- energy efficiency (strategy and promotion)
- energy efficiency (practical projects)
- transport (sustainable mobility projects)
- transport (use of renewable energy sources)
- energy from bio-waste (e.g. wood waste)
- intelligent and energy efficient buildings (both refurbishment and new build)
- street lighting
- social housing energy use projects
- citizen engagement and behavioural change initiatives
- business engagement initiatives
- renewable energy generation
- district CHP initiatives
- participative planning on energy and related issues
- flexible working
- use of ESCO financing models
- IT and other electrical/electronic equipment recycling
- Innovative low power IT initiatives
- Sustainable digital network development

Working on the assumption that most partners will provide input to at least 12 topics then it is anticipated that we will initially have some 120 case studies which will then be clustered together to provide a series of summary overviews. The aim is to have at least 200 case studies available by the end of the project.

The importance of this stage of the project is reflected in the hours allocated to this in terms of the efforts of KC and CG where it has always been intended that there will be the equivalent of one full time person allocated to this work during this period. This is regarded as an essential commitment during this period and phase of the project.

b) Study visits:

Each study visit will be planned by the host city in partnership with WP1 and will focus on the priority topics proposed by the host city with additional opportunities to discuss related topics as agreed by the Project Management Committee. Each host will be responsible for translating any appropriate printed and web based material which they are producing in their national language into English and, where appropriate, from English into their national language. A draft schedule and list of topics will be produced by the partners in M1. There are 6 sets of study visits, including one linked to the launch event to be held in Manchester. The others will take place in Malmo, Genoa, Murcia, Katowice and a joint set in Thessaloniki and Amarooussion (the part of Athens where most of the 2004 Olympics took place). In the case of most events there will be two participants from each city region plus an additional two from Manchester (from Knowledge Capital) in terms of co-financing. It is hoped that additional representatives will be able to attend where this is appropriate but the costs of these will not be co-financed.

The process of developing the study visit arrangement will give full regard to the needs of the cities themselves in terms of providing advance knowledge of what the visiting cities' want to learn during these visits. There will be a balance between sharing knowledge about what the host cities have to offer and the needs of the visiting cities. The WP leader will ensure that all cities provide input on this as part of the process of organising the study visits with each host city being briefed about the interests and requirements of the visiting cities well in advance of the visits taking place. The WP leader will also work closely with the host cities to ensure that there is a balance between knowledge exchange on technical issues and the opportunity to engage with key stakeholders, including local politicians and other senior decision makers. This will work both ways, enabling the visits to benefit not only from experiencing at first hand the political/policy context in which technical developments are taking place but also from developing a dialogue with stakeholders in the host city about future development work including the expertise being developed, the challenges being faced and the approaches being taken towards both. The outcome of this process is intended to be a demonstrable enhancement of the local knowledge base and an improved level of engagement of key stakeholders resulting from the shared experiences of the study visit process. A qualitative performance indicator for this outcome of the study visits is included in section 6.4. This will be monitored and assessed as part of the evaluation work undertaken by WP6.

c) Results

The results of this WP will then be used to underpin the project's evaluation work carried out by WP6 and the project's dissemination plan (WP7). As well the publication of data and analysis via the webtools there will also be a series of publications (as detailed in section 6.3.1 – Deliverables) both

produced by the project and through the publication of work in progress and results from the project through appropriate journals (both professional and academic), other publications and in the press and media (working closely with WP7).

Deliverable(s) of this work package:

D2.1 Report on best practice examples from project partners to form the basis for a pilot version of the knowledge base.

D2.2 First report on case studies.

D2.3 Established knowledge base as web based tool for project partners and report on work with WP3 to plan pilot actions.

D2.4 Report on organised study visits including the collection of additional case study material to add to the case study matrix and enhance the material previously included.

D2.5 Final report on case studies integrated with input from WP5 and WP6 and updated case study collection.

D2.6 Report on use of knowledge base to support dissemination plan and updated knowledge base.

Role and contribution (tasks) of each partner in this work package:

Participant	Role & Contribution	Task N°/ Sub-task n°
Manchester Knowledge Capital (KC)	WP Leader, coordination of work on developing the knowledge base and preparation of case study template, work with WP3 to initiate planning of the pilot actions, joint work with CG to plan and implement programme of study visits	T1-6
Genoa	WP Deputy Leader – joint work with KC in planning and coordinating the study visits, review and validation of material to be used for case studies and knowledge base	T2, T4, T5
MCC	Development of Webtools, and coordination of data collection in partnership with Eurocities as a subcontractor	T3, T6
OMBC	Monitoring of progress of study visits and support to KC and CG on review of results	T4
Malmo; SEA; Murcia; Amaroussion; Exallon; Thessaloniki FEWE	Collection of existing data for knowledge base Proactive data search for new examples and reference data in line with project's requirements Participate in study visits and data analysis of results Specific support will be provided to develop a knowledge exchange process and methodology appropriate to the socio-economic environment and regional development priorities of the Katowice city-region specifically and Poland generally.	T1-6

Major other specific costs (tasks and foreseen amount):

Major subcontracts (tasks and foreseen amount, and name of organisation where available):

Eurocities – a not for profit public body will work with KC and MCC to support the work on coordination of the data collection and analysis and provide data to support the webtools in line with T3 – 12,500 Euro – linked to work on WP7.

The sub-contractors identified / to be identified were / will be selected following the provisions of Article II.9 of the Grant Agreement on competitive grounds on the basis of best value for money.

6.2.3 Work Package 3: Action planning for partner engagement: developing pilot actions in partner cities

N° of work package: 3	Name of the work package: Action Planning
Duration in months: 12 (M6-M17)	Leader of the work package: Genoa

Description of the work

Overview:

Work Package 3 aims to identify and develop the role that active partner and stakeholder engagement can play in the delivery of energy plans and to highlight the role that dynamic energy planning can play in delivering sustainable communities.

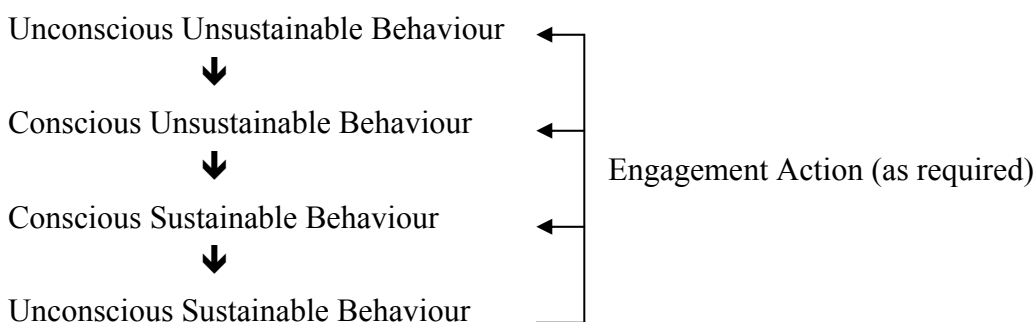
Fed by learning from WP2 and WP5, WP3 will collate and assess detail from stakeholder engagement methodologies from energy/environment/other projects and initiatives. It will also assess the value of transferable tools and ICT applications applicable to multi-stakeholder strategic plan development (e.g. OpenStrategy and PLANIT-NW).

WP3 will also map the local energy planning scenarios and identify the stakeholder groups in each municipality. A key element of this will be the identification of all key individuals/gatekeepers and mapping of their constituencies to gain full appreciation of what is required to motivate participation and action. This will capture learning and best practise from WP3.

Utilising this information, a trans-nationally-applicable community engagement methodology will then be developed that is adaptable to local conditions. Representatives of key stakeholder groups ('critical friends') will be involved in shaping this. Flowing from this will be a range of materials, media work, stakeholder workshops, intelligent systems and other stakeholder engagement tools.

Whilst such material is likely to have common local branding it will need to be adaptable to both the target audience and their stage in the attitudinal/behavioural change cycle and will include existing practice around LA 21 as an example.

Attitudinal/Behavioural Change Cycle



WP3 will then deliver a series of engagement actions to support WP4. These will be vision-led in terms of improving economic efficiencies, developing the low carbon economy, increasing RUE/RES and limiting the likelihood of dangerous climate change. These will be developed in partnership with the lead partner in each city-region and will support the establishment of the proposed SEC Forum in each area.

It is intended that the actions implemented will cover topics included in the case study matrix, as outlined in WP2, for example:

- Using renewable energy sources for more sustainable transport in one community and for more energy-efficient social housing in another;

- Creating innovative solutions for more effective recycling of organic material in one community and for non-organic material, e.g. electronic waste, in another;
- Creating behaviour change amongst citizens in one community, e.g. more flexible working, and amongst businesses, e.g. more flexible working practices, in another.

The objective is not only to demonstrate the impact of action in one community but also to create comparators to identify similarities and synergies across communities and to assess the added value of this. This will, in turn, feed into the energy plan development of the participating city-regions and enable them to benefit from the insights gained from the direct experience of developing this work in other communities. The primary effort of the participants will be focused on improving practice at a local level and to maximise the benefits of this work for local stakeholders..

WP3 will then engage relevant stakeholders through the local organisations and networks which will make up and support each SEC Forum, including local community forums, local strategic partnerships and city regional equivalents (e.g. Greater Manchester Forum in the UK), to support them in understanding the benefits of energy planning both for environmental planning and protection as well as socio-economic enhancement. Stakeholder groups will include local politicians and community leaders, regeneration partnerships, private sector businesses and organisations, public sector departments, non-governmental organisations and academic and research establishments.

Tasks:

1. Identifying best practice in stakeholder engagement methodologies

- Collecting and collating tools, techniques and learning from other energy/environment/other engagement methodologies
- Undertaking assessments of the applicability of multi-stakeholder engagement tools to the area of energy planning
- Providing practical support for each of the participating city-regions to enable them to improve their energy planning process and produce enhanced energy plans

2. Mapping local energy scenarios

- Undertaking evaluations of key stakeholder organisations relevant to energy planning in each partner city-region
- Identifying key gatekeepers and mapping their constituencies to gain full appreciation of what is required to motivate participation and action
- Identifying other non-technical barriers to successful energy planning and validating this with local partners
- Capacity building for partners to enable them to use these scenarios in the most effective way for their energy planning

3. Developing engagement methodologies

- Formation of local steering groups (supported by WP3) involving practitioners and representatives from key stakeholder groups (including ‘critical friends’) to form the core of a SEC Forum in each partner city-region
- Producing first iteration of engagement methodology, and ongoing refinement of this
- Adapting methodologies for application in each city-region
- Developing tailored action plan and timetable for each city-region
- Adapting existing, and develop new, engagement material, tools and marketing plan
- Integrating the best option locally into existing engagement groups/processes

4. Application of engagement plan methodology

- Undertaking tailored vision-led engagement activity (e.g. stakeholder forums, media activity, site visits etc.) as defined in each city-region’s action plan
- Undertaking an interactive process of self-evaluation / action plan improvement within each city-region, for sharing across WP3
- Collecting and collating learning from WP3 to feed both the learning capacity building work being developed by WP4 and the evaluation work in WP 6
- Applying the lessons learned from this process to support improved energy planning in each of the participating city-regions and implement stakeholder involvement in order to develop energy plans with a shared ownership and commitment of every involved stakeholder

Outcome of this work package:

When completed, this work package would result in:-

- Increased stakeholder understanding and capacity of practitioners to undertake effective engagement in the development an effective Energy Plan at City regional level
- Improved understanding of key stakeholders concerning the economic, social and environmental benefits of, and necessity for, energy planning
- Greater engagement, involvement and participation of key stakeholders in the energy planning process from all sectors
- Improved energy planning processes in each partner city-region and improved quality of the local energy plans.

This outcome would be assessed by a qualitative performance indicator relating to the increased awareness of key stakeholders of the benefits of energy planning and their commitment to participating in the process of engagement. A related indicator would be a measurable increase in the amount of media exposure and recognition of energy planning and related issues.

Deliverable(s) of this work package:

- D3.1 A well-developed, innovative and adaptable methodology for engagement, involvement and participation of communities in energy, including a suite of engagement materials and tools for application in each city-region
- D3.2 Application of adapted methodologies in 7 city-regions with the result of improved energy planning and improved quality of local energy plans

Role and contribution (tasks) of each partner in this work package:

Participant	Role & Contribution	Task N°/ Sub-task n°
Genoa	Work Package Co-ordination (inc. liaison with other WP leaders) and coordination of stakeholder involvement through liaison with each partner and ensuring that the action plans for stakeholder engagement in each city-region are prepared and validated	ALL
MCC + OMBC	WP Deputy Leaders – supporting Genoa in creating methodology for stakeholder engagement and developing the action plans, including collecting the best practice related to these	T1, T3, T4
MKC; Malmo; SEA; Murcia; Amaroussion; Exallon Thessaloniki; FEWE	development of local SEC Forums Provide data, support mapping process and preparation of engagement materials Identify and support the preparation of learning examples for use in WP4 Support the monitoring work on role and outcomes of each SEC Forum and feed results back into knowledge base developed by WP2 Engagement of partners in developing specific support for the Katowice city-region in terms of developing the strategic vision and process for successfully engaging local partners and supporting their SEC Forum	T2, T3, T4

Major other specific costs (tasks and foreseen amount):**Major subcontracts (tasks and foreseen amount, and name of organisation where available):**

The sub-contractors identified / to be identified were / will be selected following the provisions of Article II.9 of the Grant Agreement on competitive grounds on the basis of best value for money.

6.2.4 Work Package 4: Planning for sustainable energy communities

N° of work package: 4	Name of the work package: Planning for sustainable energy communities
Duration in months: 18 (M8-M26)	Leader of the work package: Malmo

Description of the work

Overview:

WP4 aims to support the emergence of European sustainable energy communities through increasing the use of local community planning for the efficient use of RES and conventional energy, demand-side management and associated mobility.

WP 4 will evaluate the implementation of intelligent energy planning strategies that have been instrumental in the establishment of pioneering sustainable energy communities in the EU. Critical success factors will be determined and training provided to enable the PEPSEEC partner communities to develop Energy Plans for their city regions. The Energy Plans will be developed with the use of innovative methodologies that can facilitate the engagement and involvement of politicians, planners, market actors and citizens, including innovative methodologies developed by NGOs, e.g. “Open Strategy”.

By supporting knowledge transfer across the project partners to help them in developing improved local Energy Plans with high levels of stakeholder and citizen involvement WP 4 will assist the PEPSEEC partner communities to work towards ambitious targets for improving the existing levels of RES and RUE penetration and the adoption of Low Carbon transport solutions, and assist in establishing methodologies for measuring progress. Malmo and SEA will also provide for a focus on linking energy and transport planning, including renewable fuel production and distribution e.g. the development of natural gas and hydrogen filling stations. This will also be a focus of the WP2 study visit to be hosted in Malmo which will cover integrating renewable energy systems in existing city-region systems for heat, electricity and vehicle fuel.

This will be complemented by the Best Practice Guide to be produced for each of the partner countries. This will enable the knowledge transfer process to take account of the varying policy frameworks and socio-economic environments in the six participating member states. This will be based on interpreting the differences and the commonalities of the approaches taken in this area by the six member states. This is important as the project does not want to see a ‘one size fits all’ approach to local development. The project partners are committed to ensure that the outcomes of the project are flexible and adaptable enough to meet the needs of the partners at a city-region and national member state level. The end result would be improved energy planning and enhanced Energy Plans in each of the participating city-regions.

WP4 will work closely with WP6 to ensure that the best practice approaches identified are evaluated to assess just how scalable and transferable they are to other partners and to the EU as a whole. Each member state will have different policy and regulatory contexts and different market conditions. The degree of privatisation of energy markets varies and the accessibility of energy data available in the public realm may vary significantly. In addition the level of capability and experience of energy planning will vary significantly, for example from Sweden where local energy planning has been a statutory requirement for many years to the UK where local authorities have as yet no requirement for

energy planning but are likely to have an increased role in respect of meeting CO2 targets. It would therefore be appropriate to adapt the levels of ambition and recommendations in best practice guides according to the present capability and capacity in each member state.

What is an Energy Plan?

An Energy Plan indicates how energy is supplied, distributed and used within a defined municipality and covers all types of energy needs - transport, heating, electricity etc. specifically for domestic, commercial and industrial use. It also describes the current energy flow rate from production to consumption, the resources used to generate and transport energy, sectors that are the final consumers of this energy, and an environmental impact assessment. The plan is developed with the involvement of all groups within society that are integral to its delivery and it will be approved by the elected representatives, such as the local council as the highest decision-making body in the town.

Strong motivation within consumers and producers of energy is necessary so that during the process the correct decisions are taken, and active choices made for using renewables and increasing energy efficiency.

The Energy Plans are likely to include:

- The vision, goals and objectives
- Demographic, economic and other detail about the area
- Detail on energy demand, supply and the electricity distribution and associated system
- Forecast of energy demand and supply based on current trends and development strategies (the “business as usual scenario”) and the associated environmental impact assessment.
- Forecast of demand and supply that can be achieved with the application of good practice, widespread RES and RUE measures (the proposed “low-carbon scenario”) and the associated environmental and socio-economic impact assessment.
- Existing renewable energy and energy efficiency practices
- Renewable energy resource potential (wind, biogas, biomass, solar, geothermal, hydro)
- Energy efficiency opportunities and mechanisms
- Non technical status of renewables and energy efficiency measures including economic, environmental and social issues, legislation etc
- Action plans for achieving energy use reduction, increased use of renewable energy and low carbon transport solutions.
- A timetable for action and a methodology for monitoring progress made.

The overview on the next page shows the different framework conditions for the energy plans at the different sites. More information on Murcia and the added value of PEPSESEC to their current developing of an energy plan (within IEE type 2 contracts) can be found in Appendix 3:

	Covered Area in PEPSEEC	No. of Inhabitants addressed in PEPSEEC	Existing Frameworks / Status Quo with respect to energy planning	Planned actions related to energy planning in PEPSEEC	Hours¹ (approximation)	Responsible Council/ Department to adopt energy plan elaborated in PEPSEEC
Greater Manchester	Manchester	440.000		Produce specific Energy Plan for municipality including 'test-bed' for intelligent energy systems and applications	1400	MCC
	Greater Manchester	2.200.000	Energy Action Plan – proposed high-level strategic framework to be developed	Demonstrate synergy between high-level metro-wide strategic framework and specific plans for two municipalities		
	Oldham	218.000		Produce specific Energy Plan for municipality	900	OMBC
Malmö	Norra Sorgenfri	Currently industrial area with ~1,000 employees. Planned re-development will include new residential population of up to 4,000 people	SECURE(IEE): General Energy Plan Malmo Report on actions for/by citizens aimed at energy efficiency	Thematic focus on specific locality in linking energy and transport planning in two contrasting areas to provide local neighbourhood based exemplars which are scalable and transferable to similar neighbourhoods	1800 [NB. 900 hours if divided equally between two areas]	CoM
	Western Harbour Area	2.000	SECURE (IEE): General Energy Plan Malmo Report on actions for/by citizens aimed at energy efficiency, agreed quality standards on energy (incl. responsibilities)	Thematic focus on specific locality in linking energy and transport planning in two contrasting areas to provide local neighbourhood based exemplars which are scalable and transferable to similar neighbourhoods		CoM

	Covered Area in PEPSEEC	No. of Inhabitants addressed in PEPSEEC	Existing Frameworks / Status Quo with respect to energy planning	Planned actions related to energy planning in PEPSEEC	Hours¹ (approximation)	Responsible Council/ Department to adopt energy plan elaborated in PEPSEEC
Genoa		618.000		Produce specific Energy Plan for municipality	1000	CoG
Murcia	Puente Tocinos	16.000	General Energy Plan Murcia in progress (IEE, type 2)	Specific Energy Plan for area on the edge of core city which will be facing challenges of future 'urban sprawl'	900 [NB. 450 hours if divided equally between the two areas]	MUR
	Sucina	1.500	General Energy Plan Murcia in progress (IEE, type 2)	Specific Energy Plan for area which will be facing challenges of rapid growth due to residential tourist developments		MUR
Amaroussion		100.000		Produce specific Energy Plan for municipality and provide second 'test bed' for intelligent energy applications	1300	AMA
Thessaloniki		750.000	REACM regional energy plan for Central Macedonia	Produce specific Energy Plan for municipality that recognises challenges for the city in the context of the regional energy plan as a strategic framework for the region as a whole	800	CoT
Katowice		320,000		Produce specific Energy Plan for city region	500	Katowice city-region

Tasks:**1. Developing methodologies for energy planning to promote best practice:**

* Organise a European workshop bringing together energy planners from exemplar sustainable energy cities/regions with the PEPSEEC city-region partners and stakeholders.

* Carry out an assessment of intelligent energy planning strategies that have been instrumental in the establishment of pioneering sustainable energy communities and identify the critical success factors, including a quantitative assessment of energy plan strategies and implementations, e.g. on energy consumption which will be published both in print and on-line formats

* Produce a best practice guide on energy planning strategies appropriate for each partner country together with a summary publication which will bring together all of the key issues, covering best practice and tackling challenges, in one comprehensive document which will be published both in print and on-line formats. This best practice guide will undergo thorough quality control by each country in order to maximise its usefulness to ensure that it will be of real practical support in similar communities, ranging from smaller neighbourhoods to larger city-wide areas. The quality control will elaborate on commonalities and differences between the types of sites and areas with the aim to draw conclusions and make recommendations on the transferability of the strategies. This will include which aspects are most easily transferable and which specificities would need to be considered more carefully where potential followers would like to apply similar approaches in different settings.

* Develop capacity building work to ensure that each partner city-region is able to make use of this best practice to improve their own energy planning and the consequent quality of their energy plans
This task will be led by Malmo with support from SEA

2. Provide training and support.

Provide training and support to planning partners in each PEPSEEC community to enable the necessary skills to be developed in each community to support improved energy planning. This will be based on mentoring and training provided directly to the project partners and key stakeholders, supported by joint work with Manchester to develop appropriate learning materials which can also be used for e-learning, including the capacity that will be available through the webtools being developed as part of WP1. These will also be used to support the development of the knowledge base (WP2), the action planning process (WP3) and dissemination (WP7). A helpdesk facility will be provided by SEA to support this.

This task will be led by SEA with support from one partner from each country.

3. Development of Energy Plans in each partner community

- Energy plans will be developed with the involvement of politicians, planners, market actors and citizens in each of the PEPSEEC Partner communities.
- Environmental and socio-economic impact assessments will be carried out in order to evaluate the impacts of the proposed strategies in comparison to business-as-usual scenarios.
- Methods of involving and motivating local citizens will be demonstrated and compared.

- In each case action plans will be established and methodologies for monitoring progress towards implementing the plans will be put in place. (for more detail see above description of energy plans)

Outcome of this work package: The overall aim of this WP is the increased understanding, and use of, best practice in Energy Planning for the efficient use of RES and conventional energy, demand-side management and associated mobility across European member states, resulting in higher quality and more effective energy plans.

- 1 European workshop will be organised (jointly with WP6)
- 8 Energy plans will be developed with associated socio-economic impact assessments plus 1 summary plan (for the Greater Manchester metropolitan area)
- Methods of engaging stakeholders will be tested.
- 6 country specific best practice guides will be produced.
- 1 comprehensive summary publication of best practice and tackling challenges will be produced
- Enhancing the framework for the take-up of low carbon technologies

Deliverable(s) of this work package:

D4.1 City Regional Energy Plans in participating communities

D4.2 6 Energy Planning best practice guides for each of the Partner countries

Role and contribution (tasks) of each partner in this work package:

Participant	Role & Contribution	Task N°/ Sub-task n°
Malmö	Lead and WP Co-ordination Develop methodologies for promoting best practice Quantitative assessment of energy plan strategies and implementations Organisation of international workshop Coordination of best practice guide production	ALL
Skane EA	Support to Malmö in developing methodologies for best practice and quantitative assessments Training and Support provider	T1 T2
Manchester and KC	Development of strategic energy plan for Gtr. Manchester Development of energy plan for City of Manchester	T3
Malmö	Development of additional local energy plans for 2 districts in Malmö	T3
Murcia	Development of energy plan for Puente Tocinos and Sucina Development of Best Practice guide for Spain	T3
Amaroussion	Development of energy plan for Amaroussion	T3
Exallon Thessaloniki	Development of energy plan for Thessaloniki Development of Best Practice guide for Greece	T3
FEWE	Development of energy plan for Katowice city-region Best Practice guide for Poland	T3
Oldham	Development of Best Practice Guide for UK Development of energy plan for Oldham	T3

Genoa	Development of energy plan for Genoa Best Practice guide for Italy	T3
FEWE	Specific support will be given to FEWE in terms of knowledge transfer to support work on the development of the local energy plan in the Katowice city-region and Best Practice Guide.	T3

Major other specific costs (tasks and foreseen amount):

Major subcontracts (tasks and foreseen amount, and name of organisation where available):

The sub-contractors identified / to be identified were / will be selected following the provisions of Article II.9 of the Grant Agreement on competitive grounds on the basis of best value for money.

6.2.5 Work Package 5: Intelligent systems to plan and manage sustainable energy communities

N° of work package: 5	Name of the work package: Intelligent systems
Duration in months: 19 (M8-M26)	Leader of the work package: Manchester

Description of the work

Overview:

A key aspect of this WP is the development of intelligent systems using new and innovative applications of Information Society Technologies (ISTs) for use in the development of sustainable energy communities, supporting city region regeneration, and their integration with other city systems to get the benefits of working in a holistic environment. Representative systems will be developed to support energy planning and management in terms of strategic decision-making, control and engagement and it will be shown how further systems could be produced to form a more widely integrated package to manage ‘smart’ buildings, ‘smart’ neighbourhoods and the wider built environment.

The WP will:

1. Produce a vision for the use of intelligent systems to support energy planning and sustainable energy communities in the knowledge society;
2. Identify intelligent systems to support improved decision making about strategic energy planning in city-regions;
3. Demonstrate systems that can be used to support energy planning processes and that engage citizens and businesses;
4. Show how these systems could be integrated with other city systems.

Report on how a holistic approach to all elements of intelligent systems being used in building, refurbishment and urban planning and design can lead to successful, sustainable energy communities.

Tasks:

1. Visioning: identifying ways in which the use of intelligent systems can support energy planning and sustainable energy communities, including setting targets and defining user requirements in order to create specifications for enhancing systems

2. Strategic Planning: creating a strategic framework to implement the outcomes of the visioning task, including the development of interactive models which can be used to predict possible city-region energy futures and the policy and behavioural changes required to support these, including documenting the process and preparing data for evaluation

3. Demonstrations: Capture of digital data of existing built environments with examples from each participating cities/region to demonstrate how IST applications can be used as an information base to enhance energy planning through the use of visualisations. This will enable partners and stakeholders in each partner city-region to undertake a pilot project using these tools in order to visualise consequences of different energy plans in order to use them as a tool for planners and other decision makers. The objective is to demonstrate through stakeholder meetings and other participatory approaches what impacts they would have to expect of which measures. In addition the deployment of these tools through the Web will enable an assessment to be made of the reaction of citizens and their potential use for influencing behavioural change which, in turn, will be part of a wider identification

and evaluation of how such tools can support social and economic inclusion within city-regions covering:

- a. Access in the home (via PC and iDTV)
- b. Access points and devices in community locations.

4. Accessibility assessment: Develop and test a set of criteria for evaluating the possible effects of IST systems on social and economic inclusion within SEC areas covering:

- a. Access to energy services (e-administration)
- b. Community capacity building (e-participation)
- c. New business models (e-business)
- d. The skill base (e-learning)

5 Evaluation: Devise evaluation criteria for all systems developed. Carry out formative and summative evaluation of demonstrator IST systems.

6 Production of reports.

Outcome of this work package:

- Evaluation of potential IST solutions to support SEC and energy planning more widely
- Producing results from a series of pilot and demonstration projects which will feed in to the best practice exemplars being developed in WP3, demonstrating how IST applications and intelligent systems can be used for energy planning and SEC
- Contribution to Energy Planning best practice guidance on intelligent systems and IST applications, prior to dissemination with participating partners and on a wider trans-European basis
- Predictions of impacts of energy plans, applied for stakeholder engagements

Deliverable(s) of this work package:

D5.1 Visioning report: A vision of an intelligent “networked” city-region for the Knowledge Society and targets for achieving the vision in terms of using innovative IST solutions for energy planning and SEC

D5.2 Strategic Planning: Production of analytical models for strategic energy planning in city-regions using intelligent systems and innovative IST applications

D5.3 Demonstrations: Documented prototype systems which can support the energy planning and design teams in communication and analysis, as well as supporting public participation in developing SEC

D5.4 Accessibility assessment: Concept system to illustrate how digitised data can be integrated with other types of city data related to energy planning, to support integrated intelligent city systems and link these to e-participation methodologies

D5.5 Intelligent systems management report: Report critically evaluating whether improved energy planning through use of IST systems can lead to outcomes that meet economic, social, and environmental needs of all citizens.

Role and contribution (tasks) of each partner in this work package:

Participant	Role & Contribution	Task N°/ Sub-task n°
MCC	WP Leader, coordination of visioning work and development of the strategic framework for implementation of outcomes, coordination of the development of interactive demonstrators, accessibility assessment, evaluation and production of documentation.	T1-5
Amaroussion (AMA)	WP Deputy Leader and support for developing demonstrators including validation of user requirements and assessment of outcomes	T3
MKC OMBC Malmo; SEA; Genoa; Murcia; Exallon Thessaloniki; FEWE	Each partner will identify which type of demonstration would be most appropriate to their city-region Partners will work with MCC and AMA to provide data for use in the demonstrators Partners will help to provide relevant examples and case studies of appropriate information society initiatives at local or national level that would be relevant for WP5 Support will be provided to the City of Katowice in terms of capacity building on uses of intelligent systems and good practice examples within Poland and other new member states	T3

Major other specific costs (tasks and foreseen amount):**Major subcontracts (tasks and foreseen amount, and name of organisation where available):**

Amaroussion would work with the Greek Centre for Renewable Energy Sources – CRES (www.cres.gr). CRES is the Greek national entity for the promotion of renewable energy sources, rational use of energy and energy conservation. In the modern demanding energy sector CRES is dynamically active, in the frame of the national and Community policy and legislation, for the protection of the environment and sustainable development. Working in the state of the art of technology development, CRES implements innovative projects and significant activities for the promotion and market penetration of new energy technologies – 20,000 Euro.

The sub-contractors identified / to be identified were / will be selected following the provisions of Article II.9 of the Grant Agreement on competitive grounds on the basis of best value for money.

6.2.6 Work Package 6: Evaluation

N° of work package: 6	Name of the work package: Evaluation
Duration in months: 6 (M24-M29)	Leader of the work package: Murcia

Description of the work

Overview:

WP6 aims to evaluate the result from all work packages and identify the key critical success factors from each participating region in development energy plans for sustainable communities. Critical success factors from each work practice and country will be evaluated and collated in country specific best practice guidance, in line with the approach taken by WP4. This will feed into the development of the best practice guides to be developed by WP4, the quality of which will of course also be monitored in order to ensure that it is able to meet the expectations of the target groups.

WP6 will then concentrate on identifying the commonalities and differences across the six member states and producing best practice guidance which complements and adds value to the country specific approach taken within WP4. This will support the transferability of results beyond the project partners. There will be a focus on the process of implementation as well as the results of it. This will involve engaging with the key partners in each city-region to evaluate both quantitative and qualitative data and to analyse the context in which the data is being produced, by which actors and for which reasons, e.g. legal requirements, meeting specific targets, responses to demands from citizens, NGOs etc. There will be a specific focus on the requirements of new member states and Objective 1 eligible areas and MCC and KC will be working with ISD to test out this element of the work in the context of FEWE's work in the Katowice city-region and Poland as a whole.

Tasks:

1. Producing an Evaluation Framework

This will involve setting up and maintaining a process for tracking the project's progress against:

- Project Plan
- Risks
- Issues
- Changes

Once this is agreed an implementation plan will be produced.

2. Undertaking Project Evaluation

The scope of the evaluation will include consideration of the following:

- Progress and achievements. How do these compare with/differ from those foreseen. (*For outputs this should include consideration of additionality*). Results should always refer back to the original assumptions, objectives and baseline information.
- How effective was the activity in achieving its objectives and why? Were plans/benefits outlined for special target groups/themes achieved (e.g. economic/social inclusion or environmental issues)? Were there any additional unforeseen benefits? How effectively was the project /scheme managed?

- Cost effectiveness. The answer may not always be as straightforward as cost alone, there may be qualitative issues to consider.
- How sustainable are the project/scheme's benefits?
- What the results imply for future projects.
- How efficient and effective was the project implementation? Which barriers were encountered and how were they overcome?

3. Coordinating sources of information

As well as analysing information derived directly as part of the project monitoring process, consideration will be given to securing information from other sources including consultation with stakeholders and other partners and agencies involved in delivery of the project and its beneficiaries or in the delivery of related projects, including, as required, the commissioning of specific surveys, research or studies.

4. Production of Evaluation Report

The Evaluation Report will be produced in draft form for validation by project partners and the Project Advisory Board being established as part of WP7. The final draft of the report will be presented to the final workshop to be held in Brussels and the feedback from the workshop included in the final version which will be available in both print and on-line formats.

This will include looking at a process cycle based on the following:

- The vision and how that is shared (or not). All partners will help develop a shared vision during the proposed workshops
- What resources are being allocated to support the achievement of this vision;
- What the challenges and barriers might be in terms of both objective factors and perceptions and what is being done to overcome these;
- What kind of value chains are being created to incentivise engagement with this process, e.g. new business models, carbon trading approaches, innovative investment models.

The process cycle identified will include the following stages:

1. **Assessing where we are now** – assessing the scope of activities in each of the project partners regions, including reviewing partners current situations and developed energy plans;
2. **Defining business priorities and the Vision** – assessing the strengths and areas of improvement which will have been identified as a result of WP4, from the assessment of the baselines and energy plans produced;
3. **Identify what needs improving** - “where do we need to improve?” will be one of the key questions to be addressed by WP4 and stage two of this cycle where each energy plan will be reviewed by the project lead and subject to a ‘peer review’ of how it is delivering the shared ‘vision’;
4. **Identify how to improve** - learning from the other partners through benchmarking and research where a benchmarking strategy will be developed that will help to direct efforts on ensuring that the energy plans will deliver the shared vision;

5. ***Journey towards excellence*** – identifying how each energy plan is working towards best practice and highlighting particular examples of specific achievements which can then be linked to communications and dissemination work within WP7.

Throughout this process, which is a similar approach to that used by the EFQM (European Foundation for Quality Management) model, cities will be able to see the barriers that partners face in delivering the vision at each of the workshops, linking to WP4. Best practice sharing will help overcome or address these barriers so cities avoid duplication or falling into errors already avoided by others and can work in a more proactive way to address challenges.

The project intends to use this as a framework for self-assessment (similar to the EFQM model) in evaluating the project based on five criteria:

- a) project coordination and leadership;
- b) project design and strategy;
- c) project management (finances and human resources);
- d) engagement of partners and stakeholders;
- e) the impact and outcome of the implementation process.

The intention is that all major project stakeholders will be involved in the self-assessment procedure, based on a written survey (with the option of using an on-line survey tool developed by MCC/MDDA) followed by moderated round-table discussions in each city-region and at the final workshop in Brussels.

Outcome of this work package:

- Evaluation of the project and its methodologies for energy planning development
- Evaluation of the best practice guidance produced by WP2
- Evaluation of project outputs prior to dissemination with participating city-regions and member states and to the wider EU audience

Deliverable(s) of this work package:

D 6.1 Evaluation report based on agreed methodology and process, outcome of the self-assessment procedure and validation in each city-region and at the final workshop.

Role and contribution (tasks) of each partner in this work package:

Participant	Role & Contribution	Task N°/ Sub-task n°
Murcia	WP Leader, coordinate production of the evaluation framework, validate this and produce implementation plan, coordinate project evaluation work, including self-assessment process, data coordination and production of final report	ALL
ISD	WP Deputy Leader, support for work focused on knowledge transfer to Objective 1 regions, supported by MCC and KC	T2, T3
MCC, KC OMBC Malmo; SEA; Genoa; Amaroussion	All other partners will support the work of the WP Leader in ensuring that data is provided, validation of results at local, and (where required) national level is undertaken and that the self-assessment process is implemented. Specific support will be given to the City of Katowice to identify how best the evaluation results can be used in the context of new member states.	T2, T3

Exallon		
Thessaloniki		

Major other specific costs (tasks and foreseen amount):

Major subcontracts (tasks and foreseen amount, and name of organisation where available):

The sub-contractors identified / to be identified were / will be selected following the provisions of Article II.9 of the Grant Agreement on competitive grounds on the basis of best value for money.

6.2.7 Work Package 7: Communications and Dissemination

N° of work package: 7	Name of the work package: Communications and Dissemination
Duration in months: [= Duration of the action] 10 – M8-10, M18-20, M27-30	Leader of the work package: Thessaloniki

Description of work

The project aims to promote its approach to energy saving, energy planning and the development of sustainable energy communities (SEC) in the following ways:

- a) Maximising the opportunities for communication with key decision makers in the each of the participating city-regions, by working with the other work packages to ensure that these decision-makers are supported by highlighting the development of new energy plans and the rationale for producing these;
- b) Supporting the development of effective community engagement with citizens both directly, working with the other work packages through awareness campaigns and events, and through representative organisations such as NGOs, social partners, community networks and social economy organisations;
- c) Creating networks of key professional actors, linking together officials working on energy planning, regeneration, community engagement and information society issues;
- d) Providing a framework for wider engagement, initially through the Eurocities network (as outlined below), which will create accessible networking for organisations and key people involved in energy planning on a wider basis (both in terms of other city-regions and other organisations with an interest in this field), including for dissemination.
- e) Proactively promoting the achieved results and spreading the elaborated documents and web based tools, especially the best practice guide on energy planning strategies of WP 4, to target groups at the national level (i.e. potential followers) as well as internationally.

The project's communication approach is focused on the four key elements of its "message", i.e. that, in order to achieve a 'step-change' in the commitment of city-regions to energy saving it is necessary to take a more holistic approach based on:

- Greater community engagement;
- Incentivisation of behaviour change, including new and innovative business models to stimulate market change;

- A more joined up approach across the three linked strategic areas of energy planning, regeneration and information society development;
- Greater take up of information society applications that can stimulate and support innovation.

The project partners are developing this project within the framework of the Eurocities Association (www.eurocities.org) which represents more than 120 of the largest city-regions in Europe. Manchester City Council was the President of Eurocities in 2005 and 2006 (The City of Lyon is the current President). Manchester was a founder member of Telecities, and its first President (1994-96), which is now the Eurocities Knowledge Society Forum – Telecities.

The project partners also have specialist expertise in ways of using web based tools and applications to develop a far more proactive and user focused approach to communications and dissemination. This means that interactivity and the use of user generated content will be encouraged as a key part of the project, through the active use of “Web 2.0” applications such as blogs, podcasts, social networking, wikis etc. This would be coordinated by the Manchester Digital Development Agency (MDDA – www.manchesterdda.com) and would work through a number of the European IS networks such as the Eurocities Knowledge Society Forum - Telecities and ELANET, the European Local Authorities’ Telematic Network which is supported by the Council of European Municipalities and Regions (CEMR). Eurocities has recently moved into a new building (in Brussels, 1 Square de Meeus) which is shared with CEMR and this enables the project partners to have access to a very broad and effective communications network with city-regions across Europe.

Further information about ELANET can be found at www.elanet.zonanet.it.²

One key element of this approach is to develop a specific programme of cooperation with the Environment Forum of Eurocities which meets four times per year, hosted by different member city-regions, and has recently launched a working group of energy issues. This will enable the project to start off with a ready made communication and dissemination forum enabling active engagement with key actors in the field in these city-regions, supported by the involvement of Manchester, Malmo, Murcia, Genoa, Thessaloniki and Katowice all being full members of Eurocities and Amaroussion being a member of the Eurocities Knowledge Society Forum - Telecities. This would be the first stage of the work in Year 1 to be followed by development work to build on these links with Eurocities providing support for extending communication and dissemination work through associated networks starting with CEMR.

It is proposed to have a Project Advisory Board which would support the communications and dissemination work of the project by bringing together the project partners and wider expertise from research institutes, the private sector and NGOs. It is envisaged that this would help to increase the profile of the project and ensure that it was more widely promoted through networks which both the project partners and other members would be part of. This would add value in a number of areas including:

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² “ELANET (CEMR) support to local and regional development of information society is three-fold:

- promotion of policy discussions and fora;
- implementation of mainstream European projects and other information society initiatives;
- dissemination of ICT solutions and projects results Europe-wide to local and regional governments through the institutional channels of the network and main European events, such as the EISCO conference.

Through its Policy Group, ELANET (CEMR) discusses the main issues related to policy-making at European level on the development of the Information Society (e.g.: exploitation of public information, European Research Area, eEurope, etc.). The results of the group discussion are communicated to the European institutions, especially the CoR and the European Commission and to the Associations of local and regional governments that form part of CEMR.”

- access to specialist publications and on-line publishing opportunities enabling articles, news stories and web links to be created on a much wider basis than just between the project partners;
- collaboration with other relevant research, business and NGO networks which would be able to promote the existence, the work and outcomes of the project;
- encouraging input from expertise outside of the core of direct project partners which would enhance both the quality of the internal discussions of the project as well as provide other exemplars of good practice and challenges faced elsewhere.

It is intended that each project partner would recommend one or two representatives and that the WP Leader and Project Coordinator would liaise to draw up a recommended list of members to be invited for endorsement by the project partners. This would aim to ensure that there was a balance from the three main areas, i.e. research, business and NGOs, and a total number of members of no more than 12. The aim is that the Advisory Board would meet face to face at least once each year, coinciding with a project meetings and/or workshop, and that at least one further meeting would take place each year via video conferencing. In addition members would have access to an Advisory Board virtual working group within the project Intranet where input and comment could be provided on aspects of the project's communications and dissemination work.

It is intended that the project's work with Eurocities will add value to the links and contacts that the individual partners have, providing additional credibility and profile for the project and a very effective route for communications and dissemination. Manchester, as project leader, and Eurocities will work together in seeking recommendations for members for this Advisory Board.

Thessaloniki will coordinate the WP as WP Leader, with support from Exallon. Manchester will be responsible for the work of Eurocities as sub-contractor.

Project Website:

WP7 will focus on the use of the project website and the webtools that will be based on it (the functionality and management of its development will be undertaken as part of WP1). The project website is intended to be not only an effective tool for project organisation, communication and dissemination but also a way of showcasing information society applications which are relevant to the project's themes. In order to do this the project intends to provide it with greater multimedia and social networking functionality than would normally be the case for a project website. This is seen as important for the following reasons:

- d) it will have a suitably flexible and robust content management system (CMS) which enable partners to upload a wide range of content quickly and easily;
- e) it will have secure intranet/extranet functionality to support project management and coordination;
- f) partners will develop multimedia content to demonstrate what is happening at a local level, including instant messaging with audio/video conferencing capability, blogs and podcasts;
- g) having an easy 'bolt-on' facility for integration of related web-based applications including web mapping, 3D visualisations and GIS;
- h) being able to add value through the incorporation of relevant data, services and rich content, such as geotagging of audio/visual material, RSS feeds to/from partners and third parties, video-streaming;
- i) providing opportunities for feedback, comments, responses, surveys, decision making and other interactions with stakeholders and partners via the web portal.

By investing in additional functionality, based on a range of open, accessible ‘Web 2.0’ applications, the project believes that the website will be better able to act as a showcase for the project as a whole, and specifically for the applications that are being promoted as part of WP5. This will involve integrating pre-existing and well used web tools within a more dynamic scalable web solution that will be developing new and more innovative tools during the course of the project.

In terms of WP5 the website will be developing parts of the project ‘toolkit’ as specific internet based web applications, including engagement and participation tools aimed at inviting local actors to take part in online surveys and participative decision making ‘games’. The aim here is to encourage involvement in energy planning in ways which would generate levels of engagement over and above that which would be possible through traditional means. The website would also have e-learning functionality so that materials would be developed and used online as learning tools which would support the work undertaken in WP4.

The aim is that a key set of tools would be used to proactively promote local engagement of interested actors/networks and would be available in the six languages of the project partners (i.e. English, Swedish, Spanish, Italian, Greek and Polish). The target groups would include:

- members of the SEC Forums in each city-region, including local decision makers, professional actors and citizen representatives;
- key players in community engagement in this field, including NGOs, social partners, community networks and social economy organisations;
- the creation of a ‘supporters’ or ‘friends’ network drawn from other projects, supporting networks, such as Eurocities, research advisors and other business and community networks, it is hoped that this would support the project advisory board and act as a virtual ‘critical friend’ upon which the project’s methodologies could be tested and reviewed.

This work would be supported by a content developer (initially working within the management team in Manchester for 2 days per week). This role will be to act as an ‘editor’ working with the partners to help them produce or repurpose their own content, making it relevant for the site, and taking audio/visual material that is available from, or being produced by, partners and making it more accessible via the website by editing and/or repurposing it. This will enable users to have enhanced access to additional functionality including the participative decision-making ‘games’, scenario development and data modelling tools, e.g. for mapping and visualising pollution.

Access pages and abstracts of key documents will be available in all of the six languages of the project partners. All other materials will be available either in English or in English plus the national language of the partner which has produced the material. Each partner will take responsibility for ensuring that any material which they wish to have disseminated on the website is translated into English.

The ‘alpha’ version of the website will be developed by M3, there will then be further user acceptance testing and validation and the ‘beta’ version will be available with the wider range of webtools in M6. Further roll-out and the development of new tools, e.g. for evaluation, will take place on an ongoing basis in consultation with the other WPs.

The services developed on the website would be available for users to access as open source applications using an appropriate 'open license' system such as Creative Commons*.

NB. The Creative Commons licences enable copyright holders to grant some or all of their rights to the public while retaining others through a variety of licensing and contract schemes including dedication to the public domain or open content licensing terms. The intention is to avoid the problems current copyright laws create for the sharing of information. It also provides RDF/XML metadata that describes the license and the work, making it easier to automatically process and locate licensed works. PEPESec aims to provide appropriate forms of free licenses so that copyright owners have the option to use these when releasing applications on the Web.

Tasks

1. Produce and implement communications plan for the project, including leaflets, newsletters, posters, other publications and marketing material, both in print and on-line formats
2. Develop webtools, programme and apply them with more innovatory approaches to raising the project's profile through the use of interactive applications including: simulations, visualisations, scenario building games, virtual environments (e.g. Second Life) and on-line broadcasting via RSS feeds and audio/visual material
3. Establish Project Advisory Board to provide a wider network platform for raising the project's profile, encouraging collaboration with other relevant networks and stimulating input which could improve the project's communications and dissemination
4. Dissemination of the results of the project's work, both in terms of work in progress and outcomes

Outcome of this workpackage:

- Process agreed and implemented for communication about the project
- Increasing profile achieved for the project and its work
- Growing user base established for project website and success achieved in terms of number of active users and quantity and quality of content within it
- Project Advisory Board successfully established and virtual advisory network established using webtools on project website
- Process agreed and implemented for dissemination programme and success achieved in terms of profile of the project and networking with other relevant projects and initiatives.

Deliverable(s) of this work package:

D7.1 Communications Plan

D7.2 Project website, webtools and interactive applications, leaflet, newsletter, poster and other dissemination material

D7.3 Project Advisory Board

D7.4 Dissemination process and results

Role and contribution (tasks) of each partner in this work package:

Participant	Role & Contribution	Task N°/ Sub-task n°
Thessaloniki,	WP Leader, coordination of development of the Communications Plan, including planning of the dissemination activities and monitoring of progress, and support for the Advisory Group	ALL
Exallon	Support for the WP Leader, implementation of the Communications Plan and dissemination activities	T2, T4
MCC	WP Deputy Leader, liaison with Eurocities and coordination of the development of the webtools and interactive applications	T1, T2
All other partners	Support for the dissemination process	T1, T2, T3, T4

Major other specific costs (tasks and foreseen amount):

Printing, to be coordinated by Manchester: 15,000 Euro

Major subcontracts (tasks and foreseen amount, and name of organisation where available):

Eurocities – a not for profit public body will support Thessaloniki and Manchester in coordinating the dissemination programme in line with T2 and linked to WP2 – 12,500 Euro

The sub-contractors identified / to be identified were / will be selected following the provisions of Article II.9 of the Grant Agreement on competitive grounds on the basis of best value for money.

6.2.8 Work Package 8: Common Dissemination Activities

N° of work package: 8	Name of the work package: Common dissemination activities
Duration in months: [= Duration of the action] 10 – M8-10, M18-20, M27-30	Leader of the work package: Manchester MCC

Description of work

The work package covers resources to contribute, upon request by the EACI, to common dissemination activities shared by the IEE projects in order to increase synergies amongst the projects and visibility of the project results.

Tasks

1. Contribution to the development of online information systems under EACI management (e.g. project fact sheets, reports, slides, electronic deliverables, images) in the quality and form specified
2. Participation and/or contribution, to information and dissemination events (contractors' workshops, conferences, briefing days, exhibitions, etc.) related to Intelligent Energy – Europe or other relevant EU programmes
3. Contribution to the preparation of common presentation material related to IEE actions, like the "Intelligent Energy News" newsletter and other printable or audiovisual media developed by the EACI

Outcome of this work package:

- Delivering of contributions to the online information systems and web-sites
- Participation in information and dissemination events, such as contractor's workshops, conferences
- Delivery of common presentation material and media tools

Deliverable(s) of this work package:

D8.1 Inputs to the EACI online information systems and web-site, (e.g. project fact sheets, reports, slides, electronic deliverables, images and regular up-dates thereof) in the quality and form specified.

D8.2 Project presentations and background material presented at information and dissemination events including feedback analysis thereof.

D8.3 Inputs to common presentation material related to IEE actions, such as articles for newsletters, posters, interviews, visuals etc.

Role and contribution (tasks) of each partner in this work package:

Participant	Role & Contribution	Task N°/ Sub-task n°
MCC	WP Leader	T1, T2, T3
All other partners	Support for the common dissemination process	T1, T2, T3

6.3 List of Deliverables and Schedule

6.3.1. List of Deliverables

Deliverable N°	Work package N°	Deliverable name ^a	Type of deliverable ^b	Size/Form ^c	Language(s) ^d	Target group ^e	Lead participant ^f	Dissemination level ^g	Month of completion ^h
D1.1	1	Project Governance Structure	Reports and Events	Update reports (project management format), monthly and quarterly usually about 10 pages long. Quarterly meetings involving all project partners	English	Project partners	MCC	CO	30
D1.2	1	Project Plan v1.0	Report	Approx. 15 pages	English, Spanish, Greek, Swedish, Italian, Polish	Project partners	MCC	PU	3
D1.3	1	Project Management Handbook	Publications	Approx. 10 pages	English	Project partners	MCC	PU	3
D1.4	1	Project Office	Report	Details of project office resources and facilities	English	Project partners and their main members/clients	MCC	PU	3
D1.5	1	Project Plan v2.0	Report	Updated version of D1.2	English	Project partners	MCC	PU	12
D1.6	1	Quality Review	Report	Summary report – up to 10 pages, revised every 6 months	English	Project partners	MCC with Oldham MBC	CO	6, 12, 18, 24, 30
D1.7	1	Web development plan	Report	Summary report – up to 10 pages	English	Project partners	MCC	CO	3
D2.1	2	Best practice v1.0	Webtool	Web based materials	English	Project partners	Manchester KC with Genoa	PU	12
D2.2	2	Case studies v1.0	Webtool	Web based materials	English	Project partners	MCC with Genoa	PU	12
D2.3	2	Knowledge Base v1.0	Webtool	Web based materials	English	Project partners	MCC, jointly with	PU	12

							Eurocities		
D2.4	2	Study Visits	Events	Report of each event	English, Spanish, Greek, Swedish, Italian, Polish	Project partners	MCC with Oldham MBC	PU	24
D2.5	2	Case Studies v2.0	Webtool	Web based materials	English , with summaries in Spanish, Greek, Swedish, Italian, Polish	Project partners	MCC with Genoa	PU	12
D2.6	2	Knowledge Base v2.0	Webtool	Web based materials	English , with summaries in Spanish, Greek, Swedish, Italian, Polish	Project partners	MCC	PU	12
D3.1	3	Stakeholder Forums	Events	Report of each event	English, Spanish, Greek, Swedish, Italian, Polish	Project partners	Genoa with MCC	PU	24
D3.2	3	Case studies v3.0	Webtool	Web based materials	English	Project partners	Genoa with MCC	PU	24
D4.1	4	City Region Energy Plans	Publications and Webtool	Report on each plan – up to 10 pages – plus Web based materials	Spanish, Greek, Swedish, Italian, Polish with summary of each plan in English	Project partners	Malmo and SEA with MCC	PU	24
D4.2	4	Best Practice Guide v2.0	Publications and Webtool	Web based materials	English	Project partners and first dissemination to other city regions (for feedback)	Malmo and SEA with MCC	PU	18
D5.1	5	Intelligent City-Region Vision	Report	Summary report – up to 10 pages	English, Spanish, Greek, Swedish, Italian, Polish	Project partners and subsequent dissemination to other city regions (for feedback)	MCC with Amaroussion	PU	24
D5.2	5	Intelligent Models	Report and Webtool	Web based materials plus summary report – up to 10	English	Project partners and first	MCC	PU	24

				pages		dissemination to other city regions (for feedback)			
D5.3	5	Prototype systems	Webtool	Web based materials	English	Project partners and subsequent dissemination to other city regions (for feedback)	MCC	PU	24
D5.4	5	Accessibility Assessment	Report and Webtool	Web based materials plus summary report – up to 10 pages	English	Project partners and first dissemination to other city regions (for feedback)	MCC	PU	24
D5.5	5	Intelligent Systems Management	Report	Summary report – up to 10 pages	English, Spanish, Greek, Swedish, Italian, Polish	Project partners and subsequent dissemination to other city regions (for feedback)	MCC	PU	24
D6.1	6	Evaluation Report	Publications and Webtool	Web based materials plus summary report – up to 10 pages	English, Spanish, Greek, Swedish, Italian, Polish	Project partners and first dissemination to other city regions (for feedback)	Murcia with ISD and MCC	PU	30
D7.1	7	Communications Plan	Publication and Webtool	10 page report plus web based	All 6 languages	Project partners	MCC with Thessaloniki	PU	6
D7.2	7	Project website, leaflet, newsletter, poster and other dissemination material	Webtool and publication	Web based	All 6 languages	Project partners and then open dissemination	MCC	PU	3 (alpha) 6 (beta)
D7.3	7	Project Advisory	Publications and webtool	Annual report (up to 10 pages) and web materials	English , with summaries in	Project partners	MCC	PU	12

		Board			Spanish, Greek, Swedish, Italian, Polish				
D7.4	7	Dissemination Report	Publication and webtool	10 page report plus web based	English	Project Partners	Thessalon iki plus MCC	PU	30

^d languages in which deliverable will be available

^f Name the participant of consortium who will coordinate the deliverable.

^g dissemination level uses one of the following codes:

PU = Public, to be freely disseminated, e.g. via the project website (if appropriate, the dissemination could be limited to the target group but please indicate) (in exceptional cases for sale but please indicate and be aware that revenues must be budgeted in Part I and by no means may the action generate profit)

CO = Confidential, only for members of the consortium including the Commission/EACI Services

^h Month in which the deliverables will be completed. Month 1 marks the start of the project

6.3.2 Schedule

Project phase / Duration of the project (in months)	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	
Work package 1: Management																															
Work package 2: Knowledge Exchange									x	x	x																				
Work package 3: Action Planning																															
Work package 4: Planning for SEC								x	x	x																					
Work package 5: Intelligent systems								x	x	x																					
Work package 6: Evaluation																															
Work package 7: Communications and Dissemination -																															
Workpackage 8: Common Dissemination Activities																															
Project meetings ^a	x				x							x						x						x					x		
Project reports to EACI ^b										PR									IR											FR	
Project deliverables ^c			D1.2 D1.3 D1.4 D1.7			D1.6 D7.1 D7.2						D1.5 D1.6 D2.1 D2.2 D2.3 D2.5 D2.6 D7.3						D1.6 D4.2						D1.6 D2.4 D3.1 D3.2 D4.1 D5.1-5.5 D6.1 D7.4					D1.1		

NB. WP4 and WP5 will start 3 months earlier in M8

^b interim report (IR – technical and financial)

final report (FR – technical and financial)

progress reports (PR)

(PR/IR within 1 month after the end of the period, FR at the latest 2 months after the end of the period, no costs can be claimed for those 2 additional months).

6.4 Performance Indicators

The potential energy and CO₂ savings targets savings that are used in the indicators are based on the European targets agreed to by the member states in 2007. However we do not expect each city-region's energy plan to all have the same targets and rates of progress towards the targets. Some areas naturally will be able to achieve certain targets more easily than others and this will be influenced e.g. by national targets and support mechanisms in place.

The energy plans are simply agreed proposed pathways to carbon reductions and those pathways will change as experience is gained and new priorities emerge. The plans will provide a means of monitoring progress towards targets. However it is helpful to make the city-regions aware of the ambitious targets that the member states have signed up to and this is why we propose to use these as a means of benchmarking the proposed targets of the energy plans, providing a flexible mechanism to highlight both progress made, and challenges encountered, in working towards these targets.

Performance indicator	Quantification of success ^a	Related work package and/or deliverable N ^o
No. of energy plans prepared	Minimum of 9	WP4 D4.1 – 4.6
No. of energy plans with ratification and agreement to action by senior decision makers (mayors or similar)	Min. of 6	WP4 D4.1 – 4.6
Co2 savings identified (Tonnes)	20% reduction (average)	WP4 D4.1 – 4.6
Potential renewable energy and targets agreed (MWh/yr)	20% of total energy demand (average)	WP4 D4.1 – 4.6
Targets agreed for uptake of biofuels (%age)	5-10% (average)	WP4 D4.1 – 4.6
Potential energy saving targets agreed (MWh/yr)	20% reduction (average)	WP4 D4.1 – 4.6
No. of site visits	Min. of 6	WP2
Dissemination of knowledge through the site visits	Qualitative assessment of the impact of site visits on participants from project partners	WP2
No. of local stakeholder organisations engaged in each city region	Average of 25 per city-region	WP3 D3.1- 3.3
Increase in the scale of stakeholder engagement during the course of the project	Qualitative assessment of increased involvement including media profile of relevant issues	WP3
No. of case studies on city regions which are implementing good practice in intelligent systems	Min of 3	WP5
No. of national best practice guides	6	WP4& 6
No. of delegates attending PEPSEEC seminars	100 relevant market actors per country	WP7
No. of stakeholders with increased awareness and understanding of energy planning	100 relevant market actors per country	WP7

European event participation	An average of 5 representative per city-region, i.e. a total of 35 people, with approx. 15 participant observers from outside of the participating regions	WP4

6. Appendix 1 Composition of the Consortium and the Role and Responsibility of the Participants

a) Participant List

Partic N°	Participant name	Participant short name	Country code	Main Role in Consortium
1 (CO)	Manchester City Council	MCC	GB	Project Management
2	Manchester Knowledge Capital	KC	GB	Knowledge Exchange
3	Oldham MBC	OMBC	GB	Project review
4	City of Malmo	CM	SE	Action Planning
5	Skane Energy Agency	SEA	SE	Energy Planning
6	City of Genoa	CG	IT	Action Planning
7	City of Murcia	MUR	ES	Evaluation
8	Municipality of Amaroussion	AMA	GR	Intelligent Systems
9	City of Thessaloniki	CT	GR	Dissemination
10	Exallon	EX	GR	Dissemination
11	Institute for Sustainable Development	ISD	PL	Evaluation
12	Polish Foundation for Energy Efficiency	FEWE	PL	Energy Planning

b) Rational for the composition of the consortium

The consortium represents a range of socio-economic environments which aims to present a representative cross-section of the EU25 (plus one Accession State). Most of the city-regions are members of Eurocities and this enables the project to use Eurocities as a ready made collaboration platform which will be able to underpin and add value to the new collaborations made possible by the PEPSEEC project. As outlined in WP2 and WP7 Eurocities, as a not for profit public body, will act as a sub-contractor to support the PEPSEEC consortium in the implementation of the workplans for the Knowledge Exchange and Dissemination activities for the project.

The Manchester City-Region Partnership will take responsibility for project coordination and management as follows:

- a) Manchester City Council (MCC) will be the lead and accountable body and lead WP1;
- b) Oldham Metropolitan Borough Council (MBC) will support MCC through hosting the Project Review Team (as outlined in WP1) and will be deputy lead partner for WP1;
- c) The Manchester Knowledge Capital Partnership – a public not-for-profit body – will provide specialist expertise to MCC and Oldham MBC to support these roles.

Each of the PEPSEEC project partners will either act as WP leaders or WP deputy leaders as follows:

WP2 – Lead: Manchester Knowledge Capital; Deputy Lead: Genoa

WP3 – Lead: Genoa; Deputy Lead: Manchester

WP4 – Lead: Malmo; Deputy Lead: Skane Energy Agency

WP5 – Lead: Manchester ; Deputy Lead: Amaroussion

WP6 – Lead: Murcia; Deputy Lead: ISD

WP7 – Lead: Thessaloniki; Deputy Lead: Manchester

WP8 – Lead: Manchester

7. Appendix 2 Description of Each Participant

1 – MANCHESTER

Manchester's European networking:

Manchester has been a member of the Eurocities Association of Metropolitan Cities (www.eurocities.org) since 1992. Cllr. Richard Leese, Leader of Manchester City Council was elected to the Executive Committee of Eurocities in 1997, served as Vice-President of Eurocities from 2001 to 2003 and was elected as President of Eurocities at the 2003 AGM for 2004-6. The 2006 AGM was hosted by Manchester in November 2006. Eurocities now has a membership of more than 100 of the major cities of the 25 EU members .

Manchester is a pioneer in the development of new information and communication technologies (ICTs) to promote economic regeneration and social inclusion, launching the UK's first community based computer information and communications system in 1990, establishing the first Electronic Village Halls across the city in 1992 and the Manchester Community Information Network in 1994. Manchester was a founding member of the European Telecities network and its first President in 1994-1996. The Telecities network is now the Knowledge Society Forum of Eurocities.

In 1996 Manchester was a founder member of the European Digital Cities programme supported under the 4th Framework Programme and the Infocities project supported through the TEN-Telecom programme. Since then Manchester has been involved in a wide range of trans-European programmes focused on e-government, social inclusion and the Information Society supported through Objective 2 Structural Funds, Community Initiatives (including EQUAL, Leonardo and Interreg II & III) and the 5th and 6th Framework Programmes.

Most recently Manchester is coordinating the Intelligent Cities – “IntelCities” project, funded under the EU's Sixth Framework Programme (FP6) as an Information Society Technologies (IST) Integrated Project (IP) – www.intelcitiesproject.com . The IntelCities project is one of the largest EU e-government projects and has 22 cities, 20+ universities and 30+ companies involved. Manchester is leading the project's work on regeneration and the use of new 3D visualisation technologies to support urban redevelopment, building design and community consultation and participation in new developments.

Manchester's role in European projects and partnerships:

Manchester's involvement in European projects and partnerships reflects the city's experience of working in a wide range of socio-economic environments. Manchester City Council, through its newly established Manchester Digital Development Agency (MDDA) – www.manchesterdda.com , represents a diverse, multi-cultural urban environment which is at the forefront of innovative approaches to regeneration. The city was recently called “Britain's regeneration capital” by the UK's Deputy Prime Minister. Manchester provides a dynamic test bed for applications and services being developed by its projects and partnerships, bringing together not only civic representatives, decision-makers and regeneration professionals at the highest level but also the local business community, research organisations, NGOs and community representatives. Manchester also plays a key role in networking and dissemination through the many European networks in which it is involved, such as Eurocities and Telecities (as outlined below).

Manchester will be working in partnership with Eurocities on the basis of a subcontract for work in relation to WP2 and WP8 to Eurocities. This is on the basis that Manchester is the current President and that, as Eurocities is a not-for-profit organisation, it is understood that such a pre-agreed subcontracting arrangement would be evaluated differently from that with any private sub-contractor.

2 – KNOWLEDGE CAPITAL (MANCHESTER)

Manchester: Knowledge Capital (M:KC) is a strategic partnership of Greater Manchester's ten local authorities, its universities, industry, businesses and other public agencies, concerned with the development of the knowledge economy. Competitiveness, innovation and sustainability are key components of this. Our strategic role is to help our partners identify and develop new ideas and new ways of working together; on a more operational level we also lead on key projects. One such initiative is the green energy programme Manchester is my Planet, which is developing a range of practical sustainable energy initiatives that can lead the city-region along the path to a low carbon economy. As part of the Manchester is my Planet initiative M:KC is testing novel ways to engage with the public on the matter of energy and climate change and to date over 15,000 people living in the city-region have taken the Manchester is My Planet pledge to help reduce CO2 emission by 20% before 2010. see www.manchesterknowledge.com and www.manchesterismyplanet.com

M:KC operates on a not-for-profit basis. The accountable body of M:KC is Manchester Enterprises. Manchester Enterprises is the economic development agency for Greater Manchester, with a strategic remit to deliver economic growth and to improve the prosperity of local people. Manchester Enterprises is responsible for economic analysis, economic development strategy formulation and implementation, and programme management.

3 - OLDHAM

Oldham Council provides a wide range of services for the people of the Borough and manages an annual budget totalling about £500 million. The work of the Council is undertaken by five Departments which are answerable to the Cabinet of the Council. The Cabinet is the decision making body of the Council and acts in line with the policy framework and budget of the Council. A Standards Committee on probity, licensing and planning committees and six Area Committees complete the municipal structure.

The unitary borough covers an area of 14,236 hectares comprising of an urban industrial /former industrial west (forming part of the Greater Manchester conurbation) and a rural/semi-rural upland east. Some 22% of the Borough is within the Peak District National Park. The population of the Borough is 218,000.

4 – CITY OF MALMO

The City of Malmö is the 3rd largest city in Sweden, the commercial centre of southern Sweden and an international city. This is expressed, not least, by the fact that Malmö has 270.000 residents who speak some 100 languages and belong to 164 different nationalities. Malmö is also undergoing a transition from being an industrial city to a city of knowledge. Older industries have been replaced by investments in new technology and training programmes of high calibre. Malmö University, which opened in 1998, is Sweden's latest venture in the field of higher education, accommodating some 20.000 students.

Malmö is very active in international and European cooperation. We are active members of several European networks as Energie-Cites, Union of Baltic Cities, Euro Cities, etc. Malmö takes part in more than 100 European projects and the Environment Department is one of the most active departments with 20 running European projects.

A breaking point for Malmö was the hosting of the European Housing Expo, Bo01-City of Tomorrow 2001. This was a major event with 400.000 visitors during 4 months. The housing expo

was a temporary exhibition but also the development of a brand new city district in the western harbour of Malmö. The objective was to show an international example of sustainable urban development. A holistic approach included all environmental aspects such as cleaning of brown land, waste management, construction and architecture, mobility, etc. The new district was supplied with 100% locally produced renewable energy. This innovative concept was awarded the European Commissions Campaign for Take-Off Grand Prize in 2000. The energy concept was supported by the FP5 programme, SURE/RESECO-project. The Bo01-Western harbour has been a motor for further development in Malmö towards sustainability and an inspiration to other development projects both in Malmö, Sweden and Europe.

5 – SKANE ENERGY AGENCY

Regional energy agencies are from the beginning an incentive from the EU SAVE-program. Today there are about 260 agencies established in Europe. The tasks for regional energy agencies in Sweden are to work for an increasing use of renewable energy and an efficient use of energy in their own region with consideration to national and international goals of energy and environment.

Skåne energy agency is a unit within the Association of Local Authorities in Skåne. Skåne energy agency has no basic funding from the local authorities whereas all our funding derives from projects we participate in and carry out. The projects our agency participates in can be found locally, regionally or internationally. Our work is directed towards all inhabitants and organizations in the region. It measures from industries to private citizens.

At this moment Skåne energy agency is involved in several projects. One of our basic tasks, is to handle guidance of energy matters for private citizens and smaller companies in four municipalities in Skåne. At the same time we coordinate a large project involving biogas matters in the region. The agency has a lot of experience of organizing seminars where different aspects of energy matters are discussed. We are also involved in a project that aims to reduce energy use in hospitals. Our last project, which we took initiative to, is energy planning in local authorities in Skåne. This is why, with this project in mind, Skane became a partner in the PEPSEEC project.

Energy Planning

With support from the national Swedish Energy Agency, Skane energy agency initiated the work with energy planning in municipalities in Skåne. The concentration of effort started with a seminar to consider the municipalities' interest in working with energy planning. As a result Skåne energy agency started to be active as project leader in the planning process in two municipalities. At this very moment we are in the middle of the planning process with these two municipalities and we have opened discussion with other municipalities. Along with the planning process we will arrange workshops about energy planning, open for all Skåne's municipalities. Our ambition is, that in a time spectra of about 2 years time, continue to assist 3-5 municipalities in Skåne to develop authoritative energy plans.

6 - CITY OF GENOA - "Comune di Genova" or "Genoa Municipality"

"Comune di Genova" or Genoa Municipality is the entity responsible for the management of a territory 243 sq. km located in Northern Italy, at the Northern edge of the Tirrenian Sea; city coordinates are Latitude: 44° 24' 39" N and Longitude: 8° 55' 56" E. Population is 618.438 inhabitants, as per march 31st, 2006; density averaging 2553 inhabitants / sq.km.

Genoa also is the capital town of the Provincia of Genoa, which has a surface of 1.838 sq. km and a population of 875.732 (Dec 2004 estimate) and of the Liguria Region, 5.421 sq. km and a population of 1.592.309. In Genoa are 69% of the Province and 38% of the Region population.

Genoa Municipality is organized under divisions, project units and task forces, all dealing with administration and regulation purposes. Moreover, it has a strong share participation in AMGA, the formerly municipal gas and water distribution company, involved in the capillary methane distribution in the city; this cooperates in giving a sound experience in clean-energy related matters.

As stated in the Italian Public Administration Organisation, Genoa Municipality Official Statute indicates, among others:

Title 1, Art. 3 - Main objectives

2. "a)... promotes the defence of life, of its quality and of health...e)...promotes the conditions for realisation of an efficient system of public and social services and best availability to all citizens, in particular the disabled...h)... operates to repair city real estate, to overcome lack of balance in living conditions...l) promotes the defence of nature, of living species and environmental and landscape resources n)...enhances the value of citizen's democratic participation to the formation of local community's will...

According to all of that, Genoa Municipality believes that assuring the liveability of the city means reducing the energy which is necessary in order to reach and live all its settings, by all the categories of people, without any discrimination based on gender, age or ability. The problem is very striking in Genoa, where the territory emphasizes the vertical dimension of the urban space. Accessibility thus means a quality of living that the city as physical entity must offer, and that thereby consists of adapting the different spaces by removing those obstacles that hinder a development of the whole potential autonomy and free choice by everyone, or by specifying alternative means of energy that allow to remove the same barriers with the lowest waste.

7 – MURCIA

The municipality of Murcia is located in the south east of the Iberian Peninsula, in the southern part of the Region of Murcia, at coordinates 38°2'N and 2°32'E. Murcia is the capital of the Autonomous Community (Region) of the same name, which, with its area of 11,317 km², is the largest autonomous community of only one province in Spain. According to census figures of population at the first of January 2006, Murcia counts around 420,896 inhabitants, placing it in the group of the seven most populated cities in Spain. Of this population, 45% live in the city and the others in the outskirts (54 districts).

Due to its status as regional capital, it is the home to official bodies, health and educational organisations (public and private Universities) which together with its flourishing service sector are a focus of attraction for the citizens of the whole region and even for those living outside the region. From an energy point of view, the City of Murcia receives more than 2.500 hours of sun per year. (Global insolation: 1,610kWh/m² year).

Since 1996, the City Council of Murcia has shown a firm commitment to ensuring that the criteria of environmental sustainability guide the development of our city. The process began with the "Programa Terra de Desarrollo Sostenible mediante Planeamiento" (Terra Programme of Sustainable Development through Planning). In 1999 it signed the Aalborg Charter, and began to design the Agenda 21 Local. In 2005, it joined, together with another 80 cities, the Red Española de Ciudades por el Clima (Spanish Network of Cities for Climate), which provides support to the cities in adopting the measures for fighting against Climatic Change, as well as promoting actions that favour the establishment of preventive policies in the Town Councils. The action plan which the member towns of the Network of Cities for Climate will adopt will be developed in two phases. In the first phase there are nine actions, including the approval of municipal bylaws regarding thermal solar energy for new constructions and for lighting, the progressive incorporation of energy efficiency systems and the implementation of renewable energies in municipal buildings and their dependencies and sensitising campaigns regarding the efficient use of energy. The second phase will include municipal energy plans, energy audits, design and approval of a Sustainable Mobility Plan, the promotion of means of transport that consume less energy and which are less pollutant, etc. In the financial year of 2005, an investment of 1,000,000 € was made on a national level.

According to that provided in Chapter III (Article 25, 26 and 28) of the Regulatory Law 7/1985 of the Bases of the Local System, the City Council of Murcia has responsibilities with respect to the Protection of the environment, and carries out complementary activities of Environmental Education. To this end, it carries out numerous actions, which would not have the desired effect without the necessary support of the general public. Therefore, for several years, the Regional Office for the Environment has been developing two complete Environmental Education Programmes, one for the general public and another for Schools and Associations within the City of Murcia, from which more than 200,000 school children have benefited during the 10 years since it was first implemented. In the latter Programme, a selection of 12 main urban environmental subject areas complement the teaching activity, with talks, workshops, visits, etc. These subjects include Transport and Energy.

8- Municipality of Amaroussion Development Company (AMA)

The Municipality of Amaroussion is situated in the northern part of the greater Athens region. Its population counts approximately 100.000 inhabitants. This northern part of the greater Athens region is one of the most developed and high-income zones. More than 50% of the population hold a Higher Education Degree. 82% of the active population is employed in the tertiary sector, while the unemployment rate is around 10%. In the last sixteen years the city has been gradually transformed into a constantly increasing business centre, while there is still a growing demand of a large number of companies, of all economic sectors (industry, commerce, and services), to transfer their head offices in the city. Today, more than 1000 companies with more than 60.000 employees have moved in Amaroussion. The city is also one of the most important locations in Greece for companies that are related to advanced technologies. Last but not least, the Olympic Sports Complex, where most of the summer Olympic Games 2004 took place is located at the outskirts of the Municipality.

A brief description of the activities of AMA is as follows:

- Carrying out studies, which are related to the interests of the Municipality
- Maintenance of facilities, that the Municipality possesses
- Provision of new services and improvement of existing ones
- Exploitation of any properties of the Municipality
- Participation in enterprises and companies (municipal and private), which aim at providing service to the citizens of Amaroussion
- Implementation of projects, which are related to the Municipality
- Execution of financial services in accordance with the existing legal framework

In relation to energy initiatives, the Municipality has formulated a plan for the rational consumption of energy and the control of electricity consumption in the municipal buildings. In addition, within the context of EU-funded projects, it has formulated a plan for the reduction of CO₂ emissions as well as the installation of a photovoltaic in selected municipal buildings with the co-funding both of the European Commission and of the Greek Ministry of Development.

9 – CITY OF THESSALONIKI

Thessaloniki, a modern Greek city, the second biggest city of Greece. The city is built in the beach of homonym gulf [mycho] in the wider marine region of [Thermaikoy] gulf. Thessaloniki is the centre of Northern Greece, capital of Macedonia. It is found in a separate geographic place with direct connection to the all directions and it constitutes crossroad where are met the countries of Western Europe with the new states Central and Eastern Europe. Thessaloniki is named after Alexander the Great Sister and was build around 315 B.C. Also during the Byzantine time it was the second biggest city of the Byzantium empire.

The municipality Thessaloniki is the central and biggest Municipality of urban group of Thessaloniki, with population of 750.000 residents. It constitutes a big organism with activities that cover's all spectrum of competences of local self-government. It is structured in seven Sub-Municipalities [Antidimarchies]. The city's airport serves over 2.500.000 population, for the greater area of Macedonia.

The city of Thessaloniki is the biggest employer in Northern Greece, with over 4.500 employees and with an annual budget of close to 300.000.000 €.

During the last years have Thessaloniki been very active in participating in EU projects in order to exchange best practices from various departments, such as Architecture, Clean Energy, Culture, and more.

During the Last 8 years our Mayor is Mr. Vasilios Papageorgopoulos who is having a successful mandate, have been very active in transforming the city in to a human big city. He has been very active in the cultural sector, in clean energy resources, and he is also responsible for the new Municipality building that will be standing ready on year 2008. Our Mayor is also responsible for the creation of the new Regional Library of Thessaloniki. He is active in transforming of the city's coast line, the ancient and historical places. During the last years our Mayor have also been pushing for the digitalization of municipality information and provide easy access to public.

Thessaloniki has 2 major universities with over 150.000 students, both national but also international.

Thessaloniki is active in the topic of clean energy. One of the Municipalities actions have been to create the Association of regional and municipal authorities of Greater Thessaloniki, Energy Department. The municipality have been active in national projects regarding the Clean energy, and have now turned towards the EU for learning more and disseminating its results from other EU countries.

The responsible person for EU projects:

Athanasios Papageorgiou, Senior Executive manager for EU projects.

Mr. Papageorgiou have been active for EU projects during the last 6 years and have handled projects from 50.000€ up to 4.000.000 €. He is the coordinator for the different departments of the municipality. Since the Municipality have so many different departments Mr. Papageorgiou have been the responsible one to coordinate and assign the projects to the experts in different departments.

Responsible departments

The department of Urban development & Architecture, and

The of Association of regional and municipal authorities of Greater Thessaloniki, Energy Department

10. Exallon

EXALLON is a specialist consulting company established in 2004 with staff who have been working in these fields for between 5 and 12 years. The company specialises in Project Management, Dissemination, IT/IS, e-Content, e-Government, Environmental, and Energy

Exallon's biggest customers are:

1. Public Authorities, Municipality of Thessaloniki, Prefecture of Thessaloniki, University of Thessaloniki, Municipality of Lachana.

2. Private sector, Euroceramica S.A, Pelle Fashion Shoe industries, Intracom S.A. OTA Meizonos Thessalonikis, SIEMENS S.A.

Some examples of projects Exallon have cooperated, since start as subcontractor are the following:

Project Management

- Film Cities,
- Ascend,
- Ionas,

- Lap's and Rap's. The Laps and Raps project seeks to address these six priority issues for NAPS by developing a common methodology for the development of Local and Regional Action plans for social inclusion which would focus on these policy themes.
- Early School Leavers. Young people leaving school early face a multitude of problems eg. decreasing job availability, lack of work experience, increasing casualisation of the labour market, and conflicting pressures to complete their schooling and/or to take on volunteer, unpaid or part-time work. If they do not complete their compulsory period of education, their problems are compounded. Wider contextual issues affecting them include increasing economic and social instability, social expectations, a growing incidence of homelessness and poverty, and problems of self-identity, particularly for those alienated by their school experience.

Dissemination

Exallon has been responsible for dissemination in the following projects for the municipality of Thessaloniki:

- Film Cities, Responsible of User requirement,
- Ascend, Responsible to identify best practices and to disseminate the results.
- Ionas, Responsible to identify best practices and to disseminate the results.
- For the prefecture of Thessaloniki, Responsible for working with the Governor of Thessaloniki, with dissemination activities. Mr. Psomiadis is now the Governor of the Prefecture of Thessaloniki.

Dissemination of the Best practices and the results of the projects by Organising Conferences, Design Brochures, design Maps, Leaflets, Organising Dissemination Material, for 2 TV Channels and 3 Radio stations, presenting the Projects to the appropriate authorities, involving scientists, such as Architects, Landscape architects, Environmentalists, and more.

- Film Cities, Brochures, CD's, Local conferences.
- Ascend, Brochures, CD's Local conferences.
- Ionas, design of the Brochure and Local Conference
- Lap's and Rap's, Presentation in Local TV and Radio Station
- Early School Leavers, Presentation in Local TV and Radio Station.

Private Sector (Intracom S.A.)

- eProcsee, Presentation of The product to Turkish Public Authorities. Organising a local conference, Brochures, and CD's.

IT/IS

- Call Center, (O.P.S.) Creation of a high tech Call center with IVR services. Cooperation with SIEMENS S.A. (*Private Sector*)
- VEPrIM a Process-centric business solution (*Private Sector*)

Process-centric solutions allow organisations to respond more effectively to any changes in their business landscape. Integrating solutions based around a process-centric model allows organizations to react rapidly and embrace change in their IT systems.

The VEPrIM approach creates a more flexible business model close matching the business systems within the business environment. The requirements for VEPrIM process centric solutions are to allow all the couplings of infrastructure components such as legacy applications, package solutions database and other resources (both automated and manual), through a rules-drive or business - process - driven model.

- Info Orasis, Web Content Management Tool, Exallon's Role was programming parts of the Tool (*Private Sector*)
- ADON, Intelligent Mobile Displays for outdoor Advertisement. Programming and Testing (*Private Sector*)

eContent Projects and TEN Telecom

Mr. Marinidis worked as an expert in the following projects.

For INTRACOM (*Private Sector*)

- eProcsee, User Requirements and Market Analysis and Business Plan,
- eMage, User Requirements and Market Analysis and Business Plan,
- eTender User Requirements and Market Analysis and Business Plan,

Environmental Projects

- CarbonPro, Exallon is a). The technical partner involving our Environmental Personnel. The project aims to share best practices for the management of forest systems, on the base of Kyoto Protocol policies. B). Providing dissemination services through disseminating the results of the project to the Forestry Authorities and awakening the public Authority of the area of Thessaloniki through various dissemination actions.

Thermaikos Lab.

- The creation of an environmental lab in the Area of Thermaikos gulf in order to be able to measure the pollution of the Thermaikos sea.

11 Institute for Sustainable Development - ISD

The ISD has operated since 1990 as an independent, non-governmental and non-profit organization. The mission is to implement and disseminate the sustainable development concept in Poland. It focuses on policy issues and practical application following the policies. The Institute deals with the fundamental problems of environmental policy aligned with economic and social development supplying the central government as well as local self-governments and NGOs with policy oriented, and multi-disciplinary expertise. Recently ISD is focusing on energy and climate issues.

ISD will act as a strategic partner working with FEWE to draw out key lessons in terms of the requirements of new member states and Objective 1 eligible areas. MCC and KC will be working with ISD to test out this element of the work in the context of FEWE's work in the Katowice city-region and Poland as a whole.

12. Polish Foundation for Energy Efficiency - FEWE

The Polish Foundation for Energy Efficiency (FEWE) is a non-for-profit, non government organization established in 1990. FEWE's mission is to promote economic development and protection of the natural environment through promotion of energy efficiency.

FEWE activity concentrates on:

- Studies of aspects of the global economy that influence the situation in Poland.

- Studies and analyses to support energy efficiency and environmental protection nationally, regionally and on a local scale.
- Support for initiative, including joint ventures with foreign companies as well as transfer of energy efficient materials, technologies and know-how.
- Training, consulting and the implementation of demonstration and pilot projects.
- Public education.

FEWE activity encompasses fuel and energy consumers (industry, trade and services, municipalities, households) as well as fuel and energy suppliers (electrical power engineering, gas engineering, heat engineering).

FEWE actively participates in the changes taking place in Poland and Eastern Europe. FEWE has been involved in approximately 600 different international and domestic projects in energy and environment and demonstrated capabilities in policy advice, project development and management, energy planning, demonstration projects, program evaluation, technical assistance, financial engineering, tendering, energy audits and training.

On national level the most relevant projects comprise:

1/ Guidebooks: “Integrated Planning in Energy Economy”, “How to Plan Heat Supply in Municipalities”, “Energy Policy of European Union”, “How to Plan Heat, Electricity and Gas Fuels Supply in Small Municipalities”, “How to Plan Heat, Electricity and Gas Fuels Supply in Small and Medium Municipalities”.

2/ Energy plans and energy guidelines to the energy plans for the following Polish towns and municipalities: Bielsko-Biała, Bojszowy, Dębno, Gryfino, Jasienica, Kamieniec Zabkowicki, Kłobuck, Kondratowice, Kostomłoty, Kostrzyn n. Odrą, Łędziny, Lubliniec, Łobez, Łódź, Marciszów, Marklowice, Miasteczko Śląskie, Międzychód, Międzyzdroje, Mikołajki, Mragowo, Nowa Ruda, Nowa Sól, Opatów, Przeworno, Radom, Raszyn, Rajcza, Rogoźno, Szklarska Poręba, Wąbrzeźno, Wiązów, Wilkowice, Włodawa, Zakopane, Żywiec.

3/ Development of Environmental Protection Programs for Municipalities in Silesian Voivodeship: Czechowice-Dziedzice, Czernichów, Goczałkowice – Zdrój, Gorzyce, Janów, Lipowa, Łodygowice, Mszana, Orzesze, Pszów, Powiat Bielski, Powiat Pszczyński, Powiat Wodzisławski, Powiat Tatrzański, Powiat Żywiecki, Pszczyna, Radlin, Rydułtowy, Wodzisław, Wiry.

4/ Energy and Environment Management in Silesian Municipalities (in public buildings): Będzin, Bytom, Czechowice-Dziedzice, Czerwionka-Leszczyny, Częstochowa, Gaszowice, Katowice, Lubliniec, Lyski, Orzesze, Rydułowy, Rybnik, Powiat Rybnik, Świętochłowice, Tychy, Województwo Śląskie, Powiat Wodzisławski, Żory.

List of FEWE's most relevant projects

PROPOSER	CONTRACT NO.	Contractor	TITLE (Programme)	STATUS
NEPAS, FEWE, CRES, ApE,		IEEA	SEC-BENCH; Sustainable Energy Communities – Benchmarking of Energy and Climate Performance Indicators on the Web	Approved
NEPAS, FEWE, IFE, PROFU, CRES, EFQM, SENTERNOVE M....	EIE/05/188/si2.4 19825	IEEA	3-NITY; 3 – fold Initiative for Energy Planning and Sustainable Development at Local Level	Ongoing
FEWE		Phare 2007	Increase of Social Awareness in Active Decision Making on Local Environmental Protection and Sustainable Energy Development	Ongoing
FEWE	3105/955/99/PZE	Bielsko-Biała Municipality	Energy Plan and Energy Guidelines to the Energy Plans (heat, electricity, gas fuels supply) for Bielsko-Biała Municipality	Completed
FEWE	77 GPA/03	Raszyn Municipality	Energy Guidelines to the Energy Plans (heat, electricity, gas fuels supply) for Raszyn Municipality	Completed
FEWE, Gertec GmbH	Contract with GmbH of 29/05/03 and with Local Fund for Env. Pr. 520/2003/28/PM/wm/D and with 19 municipalities	Gertec GmbH, Local Fund for Environmental Protection, 19 Silesian Municipalities	Energy and Environment Management in Municipalities	Completed
FEWE	25/K-ce/2003	Beskydy Fund for Sustainable Development	Development of Environmental Protection Programs for 21 Municipalities	Completed
FEWE	ZZP.342-61/04	Radom Town	Elaboration of the Most Optimal Model of Heat Services Organization for Radom Town.	Completed

FEWE has implemented several information and education projects with use of internet platform as information sources, for instance:

- promotion of energy renewable sources www.oze.info.pl
- energy and environment management in municipality www.eis.slask.pl
- energy planning in municipality and communication with society to build energy sustainable economy in municipality www.eplan.info.pl

- Increase of Social Awareness in Active Decision Making on Local Environmental Protection and Sustainable Energy Development – Częstochowa City - www.czestochowa.energiaisrodowisko.pl

The internal processes of FEWE will enable the projects to be accounted for separately. The projects PEPESec and other IEE projects run by FEWE will be strictly separated on financial grounds. Each project will have a separate account and all expenses connected to the given project will be paid only from the appropriate account. Moreover staff engaged in project will have a separate contract. All time will be accounted for separately for other FEWE projects and for the PEPESec project and will not exceed official full worktime. All work times will be able to be checked on worksheets. This will ensure that no duplication can occur.

Through PEPESec specific support will be provided to develop a knowledge exchange process and methodology appropriate to the socio-economic environment and regional development priorities of the Katowice city-region specifically and Poland generally.

The project will ensure that partners are engaged in developing specific support for the Katowice city-region in terms of developing the strategic vision and process for successfully engaging local partners and supporting their SEC Forum.

Specific support will be given to FEWE in terms of knowledge transfer to support work on the development of the local energy plan in the Katowice city-region and Best Practice Guide.

Support will be provided to the City of Katowice in terms of capacity building on uses of intelligent systems and good practice examples within Poland and other new member states

Katowice

The City of Katowice is one of Poland's most progressive urban centres. For decades it was considered a city of coal mining, steel manufacturing, and heavy industry. Its diversifying economy is helping establish it as a key centre for learning and commerce. The City of Katowice is also both the Capital city and the largest city in the Katowice Agglomeration .

While this project will concentrate on assisting the City of Katowice develop an energy management plan, the results will be particularly relevant to all 15 cities which are part of the Katowice Agglomeration. The Agglomeration is the heart of the largest and historically most important industrial region of Central Europe, and is dominated physically and economically by its massive complex of coal mines, metallurgic and chemical industries, and other heavy industries. In fact, the Agglomeration is a single mass of fifteen adjoining cities with a population of approximately 2.5 million – the most densely populated area in Poland. The largest municipality is Katowice with a current population of approximately 320,000 over an area of 164.5 sq. kilometres. Eight other municipalities have population in excess of 100,000, and there are also seven smaller municipalities. While all are independent legal jurisdictions, all share similar infrastructural and environmental problems.

With the City of Katowice being located in Poland's 'coal basin', almost 100 percent of power generation and heat production is based on coal from nearby mines. This has been the cause of obvious problems including its contribution to poor air quality in the region and being a important source of greenhouse gases. Helping the City of Katowice develop an energy plan and giving it the opportunity to both share its experiences and learn from the best practices of other European cities will provide a critical step for the City, and the Agglomeration as a whole, to address its energy issues.

8. Appendix 3 PEPSEEC and other projects

a) Murcia/ Puente Tocinos/ Sucina:

The new “Local Energy Agency of Murcia” (LEAM) will produce a strategic energy plan for the province, which is an outcome of this separately funded project (IEE, type 2). Within PEPSEEC, the Municipality aims to design additional, complementary energy plans for two dependent village areas within the city-region, Puente Tocinos and Sucina. These two areas have been specifically chosen as representative examples of other village areas which will enable the transferability of the results across the city-region. This is intended to enhance and add value to the overall Energy Plan for the Murcia city-region by concentrating on the specific needs of these areas, covering issues such as transport, lighting and making public buildings and newly constructed buildings more energy efficient.

Puente Tocinos: This village area has a population of 15,174, located in the centre of the Huerta de Murcia district, on the left bank of the river Segura. The territory is used for traditional market gardening and irrigated by a network of very old irrigation ditches dating from the Muslim period. It is characterised by its many tiny plots and its proximity to the city of Murcia (2 km away) gives rise to the village merging with the city. It has a small territorial surface area (5.33 sq km) and a very high population density (2,847 inhabitants per sq km). A large number of inhabitants live in smaller villages or are scattered throughout the surrounding rural districts.

Sucina: This village area has a population of 1,517 near Murcia that occupies a large surface area (65.36 sq km), planted with forests, dry and irrigated farming land only recently been implanted. It is further away from the centre of Murcia (29 km) and has a lower population density (23.20 inhabitants per sq km) concentrated in the centre of the village. An important increase in the population is envisaged during the forthcoming years, due to the residential tourist developments planned there, and it is important to focus the additional energy planning in developing a sustainable response to this..

The Municipality of Murcia will therefore be undertaking a separate work programme which will not only produce two additional energy plans, focusing on representative types of village area in the outer parts of the municipality area, but also provide additional results which can be used to enhance the overall energy plan to be produced for the city-region, which would otherwise not be possible without the support of the PEPSEEC project. This will result in more promotional and capacity building work being undertaken in these two additional areas aimed at increasing stakeholder engagement and this will, in turn, improve the engagement work undertaken in other similar parts of the city-region drawing upon the experience gained. The City of Murcia will also ensure that appropriate internal mechanisms are in place to ensure that project funding will be accounted separately and that no duplication can occur.

The table on the next page summarises differences in an overview:

Energy plans in projects LEAM and PEPSEEC	Local Energy Agency of Murcia (LEAM)	PEPESEC
Areas covered (geographical)	Murcia City-Region	Local areas of Puente Tocinos and Sucina.
Sectors covered	Reducing high energy consumption Combating climate change Increased use of renewables City-region wide behaviour change through 'top-down' engagement with senior stakeholders	Transport Public lighting Public buildings New buildings Behaviour change through 'bottom up' local capacity building and stakeholder engagement
Additional themes covered by PEPSEEC	...	Providing for more localised engagement with stakeholders and focusing on specific issues which are particularly relevant to these areas (as above) and ensuring that the experience gained is transferable to other similar areas across the city-region
Methodology	Institution building Strategic frameworks	Local stakeholder involvement Promoting sustainable energy communities
Dissemination actions	Promotion related to existence and tasks of energy agency for the city-region as a whole ...	Transferring specific local experiences and engagement methodologies to other areas within the city-region
Sharing of best practice	Exchange with partner energy agencies in "the project", expertise related to overall development of city-region wide Energy Agency and energy planning.	Following Swedish example, expertise related to behaviour change and the development of sustainable energy communities within local neighbourhood areas with specific needs..
Outcome	Energy Plan for City-region as a whole	Enhanced energy planning process plus two additional local plans

The added value of a close cooperation with LEAM in PEPSEEC is that additional experience will be gained of how to focus city-region wide energy planning on the specific needs of local neighbourhoods within the city-region, taking account of special needs within such areas and of how methodologies need to be adapted to meet those needs. This in turn will provide a wider range of tools and experiences, than would otherwise have been available, to use in transferring these approaches to other local neighbourhoods within the city-region. In particular the City of Murcia will be able to compare and contrast the 'top-down' stakeholder engagement approaches being used to develop the Energy Agency as an city-region wide institution with the 'bottom-up' approaches being used to develop stakeholder engagement at a local neighbourhood level in order to create sustainable energy communities which are as near to the citizen as possible. The Municipality of Murcia will be working closely with LEAM to ensure coordination between the energy planning actions of both the agency and the local neighbourhood areas through:

- Regular briefings and meetings between the LEAM staff and staff working in the two neighbourhood areas;
- Producing publicity materials, both in print and on-line, which present the work of LEAM to the two local neighbourhood areas and then present the work in the two areas within LEAM;
- Setting up a joint advisory board to bring together LEAM stakeholders and local stakeholders in Puente Tocinos and Sucina.

b) Malmo/SECURE (EIE/05/125)

The City of Malmö is now working with a general Energy Strategy for the city. The plan contains objectives and measures on a general level for the whole geographical area of the municipality. The energy strategy should be ready in autumn 2007. The EIE-project SECURE is supporting the work with the energy strategy in Malmö and 4 deliverables, reports, will be produced.

- Control instruments and fiscal incentives
- Potential for Renewable energy
- Potential for energy efficiency
- General Energy Action Plan (EAP).

The city of Malmö is developing very fast at the moment, the Öresund region with Copenhagen is one of the most expanding regions in northern Europe. The city of Malmö, for example, is planning for 1500 new apartments/year.

In PEPESec it is intended that Malmo will develop a much more localised version of energy plans for some of the most dynamic and expanding districts within Malmö. The aim is to bring the specific experiences from two key regeneration areas, the Western Harbour project and Norra Sorgenfri, and to develop new and innovative energy solutions for other areas. Both, new build and renovation projects will be included in PEPESec and this level of detail will simply not be there in the general Energy Strategy nor in the outcomes of the SECURE project. The PEPESec project, therefore, would provide an opportunity to significant added value to this practice and experience and increase the benefits to be gained by support for both projects.

The city of Malmö is also one of four municipalities that is a partner in the Swedish “Housing and building dialogue project”. This kind of dialogue project with public-private partners on the local level will be developed and focused on energy issues and be then developed as a model for other cities to use. This is again adding value to what would otherwise have been achieved only with the SECURE project.

To summarise: SECURE supports a strategy on the general level – PEPESec supports a considerable enhancement of this with a minimum of two much more focused and detailed energy plans on a local level. The Environment Dept. will coordinate both projects and ensure that any overlap will be avoided.