ANNEX I

Full tile of the proposed action:	**Best practice implementation of solar thermal obligations**
Action acronym:	**ProSTO**
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Duration of the action:	36 months

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1. Abstract

The objective of this action is to boost the use of solar thermal systems in the European countries by promoting an efficient implementation of solar thermal obligations. Solar Thermal Obligations (STO) are legal provisions obligating owners of buildings to install a solar thermal system on new/renovated buildings. A growing number of municipalities, regions and countries (e.g. SP, PT, IT) are already making use of solar thermal obligations. The main stakeholders regarding STOs are local authorities. The Region of Lazio, the Cities of Lisbon, Murcia, Stuttgart and Giurgiu have joined in this action, in order to create show cases of best practice STOs. They aim at the development of optimized STOs, consisting of model regulations, tuned criteria, efficient administrative procedures and flanking measures. The availability of practical tools and the dissemination of the project results through the authorities' networks address new potential communities.

2. SUMMARY

"Europe needs a competition among communities to push for the best concepts for a broad introduction of solar energy in housing construction and urban development."[1]

The overall objective of this action is to boost the use of solar thermal systems in the European countries by promoting an efficient implementation of solar thermal obligations. Solar Thermal Obligations (STO) are legal provisions obligating owners of buildings to install a solar thermal system, mainly for new buildings or for buildings undergoing major renovation. They are in most cases part of national or regional energy laws and often implemented by means of the local building codes on municipal level. A growing number of municipalities, regions and countries (e.g. SP, PT, the Lazio (IT), the Walloon (BE) and some Austrian regions) are already making use of solar thermal obligations.

STOs implemented so far evidenced the following points of improvement to be addressed:

- Clarification of the legal situation regarding STOs
- STOs need to be accompanied by a quality assurance scheme, control mechanisms and flanking measures improving their impact
- Criteria, procedures and model documents compatible with European standards need to be developed.

The main stakeholders regarding the local introduction of STOs are local authorities. Five such local governments of the Region of Lazio (IT), the Cities of Lisbon (PT, repr. by its Agency), Murcia (SP), Stuttgart (DE) and Giurgiu (RO) have joined in this action, in order to create five show cases of best practice implementations of STOs. In cooperation with scientific partners they aim at the following specific objectives:

- Development of optimized STOs, consisting of a model regulation, well tuned criteria, efficient administrative procedures, supporting flanking measures
- Pilot implementations of STOs (local show cases) and demonstration of their high impact
- Facilitation of replication by making model documents, practical tools and recommendations available
- Dissemination of the project outcomes to potential new local authorities in Europe and EU policy

The work of this action is organised in a multiple interaction between local pilot implementation of STOs and the availability and dissemination of practical tools and experiences at European level.

First a base line assessment (WP 2) is carried out aiming at a synthesis of existing experiences on STOs with the needs of the participating local authorities, resulting in requirements on what instruments have to be made available/developed.

A STO developer toolbox (WP 3) is created aiming at the availability of the STO instruments, both, for the local implementation by the local authorities and for the dis-

[1] Longo and Rogall, SWW, April 2004

semination at European level. These instruments will be optimised with feed-back from the pilot implementation at local level.

The participating local authorities pilot implement and monitor their STOs (WP 4 + 5). This pilot implementations are show cases and stimulate as such replication at European level.

Dissemination (WP 6) is carried out throughout the whole project, at first on information level, at a second stage with real practical tools, experiences and services.

The market impact of well implemented STOs has shown to be high (up to a factor of ten in one year). In the best case, this action leads to the implementation of efficient STOs in many European regions or even countries. This can lead to an accelerated growth of the solar thermal market with installation rates estimated up to 20 GW_{th} each year (~0,5 % of Europe's total heat demand for the residential sector).

2.1. Participant list

No	Participant name	Short name	Country Code	Main role in consortium
1	Ambiente Italia srl	Ambit	IT	Coordinator of the action, expert support to the Lazio Region, long term expert in cooperation with local authorities and solar thermal
2	City of Stuttgart	Stuttgart	DE	Large city in south Germany implementing the pilot STO, responsible for the pilot implementation phase (WP 5)
3	Steinbeis Forschungs- und Enwicklungszentren GmbH	SFZ Solites	DE	Expert support to Stuttgart, responsible for the STO developers toolbox (WP 3), long term technical expert on solar thermal
4	Lisboa E-Nova - Agência Municipal de Energia - Ambiente de Lisboa	Lisboa E-Nova	PT	Energy agency of Lisbon implementing the pilot STO in Lisbon with support of the municipality of Lisbon
5	Instituto Nacional de Engenharia, Tecnologia e Inovação	INETI	PT	Expert support to Lisboa E-Nova, responsible for the base line assessment (WP 2), long-term scientific organisation on solar thermal
6	Sociedade Portuguesa de Energia Solar	SPES	PT	Expert support to Lisboa E-Nova, regarding solar thermal communication and PR measures, long term experience on promotion of solar thermal
7	Murcia City Council	Murcia City Council	SP	Large city in south Spain implementing the pilot STO
8	Ecofys ema SL	Ecofys SL	SP	Expert support to Murcia, responsible for the STO preparation phase (WP 4), good insight into the STO of Barcelona, expert in the promotion of RES
9	Lazio Region - Councillorship for Environment and Cooperation among People	Lazio Region	IT	Large region in central Italy implementing the pilot STO
10	Reseda società cooperativa sociale integrata onlus	Reseda	IT	Local expert support to the Lazio Region for landing the initiative on the whole territory of the region. Long term experience in promotion and training related to soalr thermal
11	European Solar Thermal Industry Federation aisbl	ESTIF	EU	European expert in communication, dissemination, policy, link to solar industry, responsible for the dissemination activities
12	Giurgiu City Hall	Giurgiu City Hall	RO	Medium town in south Romania implementing the pilot STO
13	SC ASTER Consulting Ltd	Aster	RO	Expert support to Giurgiu, expert on cooperation with local authorities on the field of environmental protection

3. EXPECTED RESULTS AND POTENTIAL IMPACT

3.1. Direct outcomes of the action

- The partners of the project create five show cases of best practice implementations of STOs. These STOs are based on thoroughly elaborated technical, legal and administrative criteria and procedures and accompanied by suitable flanking measures. The impact of these STOs will be monitored. One of the major outcomes is the knowledge on how to do STOs in an optimised way. The practical prove and testing by the communities creates confidence of new local authorities in STOs and changes their attitude.
- The scientific project partners transfer the documents and procedures elaborated for the communities into tools to be used at general level. The fact that the communities test these tools during their pilot implementation will turn these tools into real practical instruments. The public availability of these tools further removes entry barriers of new communities for introducing STOs. This reduces also cost and risks. So it is possible for more local authorities to consider a STO.
- Due to dissemination activities this project results are known to thousands of local authorities in all European countries. In case of real interest they also receive concrete support by the STO help desk created by ESTIF.

3.2. Potential impact of the action

It can be expected that further local authorities in Europe replicate the STO models of the participating communities.

In the best case many regions or even countries in Europe follow the example and introduce a STO. Based on the project results these STOs will be of good quality and the municipalities in these new areas will be able to efficiently implement the regulation and thus achieve its maximum impact. This could lead to a growth of the European solar collector market of e.g. a factor of 10 in few years. In terms of solar collectors installed in Europe this corresponds to a yearly installation rate of approx. 20 GW_{th} per anno, i.e. every year 18.000 GWh **more** of heat are produced by solar thermal systems. This corresponds already to 0,5 % of Europe's total heat demand for the residential, agriculture and service sector, for which fossil fuels are substituted and CO_2 emissions avoided year by year. Jobs are created in this sector and Europe's important renewable energy export economy is strengthened.

4. TARGET GROUPS AND KEY ACTORS

The main key actors for the implementation of solar thermal obligations in Europe - **the primary target group of this project - are the governments and authorities of countries and local communities, i.e. regions, provinces and municipalities.**

This target group is directly **engaged as full and main partners** of the ProSTO action: namely four municipalities and one region from five different European countries. WP 2 of this project dedicates a complete task for tuning the whole project and thus the deliverables **to the needs of the local authorities**. In WP 4 and 5 the local authorities actively test the project deliverables by using them in pilot STO implementations. These measures guarantee a high usability of the project results for this target group.

The major objective of the dissemination activities in WP 6 is the early communication of project findings to other new local authorities and to reach an involvement of them into the project. WP 6 foresees that the project results will be disseminated mainly through the networks of the participating communities.

They themselves have the best and most convincing communication possibilities for disseminating the results to new communities. Further, dissemination is foreseen at three geographical levels 'local - national - international' but also at 3 levels of communication 'creating interest - information - direct support by a international help desk', in order to guide new communities to the start of a concrete STO implementation.

In order to strengthen the 'involvement' of new communities into the project, the project partners work towards the creation of **continuous thematic work groups on national and international level**. This is reached by starting with dissemination workshops and the STO help desk already at an early stage of the project and by giving them a continuous character. By targeted invitations these workshops will be composed by representatives of active authorities, expert/multiplying authorities, complementary authorities (municipal, provincial, regional, national) and/or representatives of authority associations. A **secondary target group** are those citizens, professionals, multipliers and branch organisations concerned by the introduction of a STO:

- Energy agencies
- Branch organisations of property developers
- House owners and house builders
- Construction companies
- Planners and architects
- Solar industry and solar thermal systems suppliers
- Installers and roofers
- Promoters and multipliers, willing to convince local decision maker of implementing a STO

These groups are integrated in the project at an early stage. Hearings by the local authorities are foreseen in order to understand the possibilities and needs of these groups and to consider them during the development of the STOs. Flanking meas-

ures and volunteer agreements between the authority and these groups shall lead to benefits on both sides (win-win) and shall lead to a wide acceptance of the STO. Opinion surveys among these groups are foreseen in order to monitor also the societal feedback.

Solar industry is particularly sensitive to local overregulated market criteria. After years of efforts invested in European wide standards and labels, solar industry's request for harmonized criteria is absolutely justified. Solar industry is represented in this project by ESTIF.

5. WORK PROGRAMME

5.1. Overview

Work package break down

WP No	WP title	WP leader		Start month	End month
1	Management	Ambit		1	36
2	Base line assessment	INETI		1	4
3	STO developers toolbox	SFZ Solites		5	36
4	STO preparation phase	Ecofys SL		10	18
5	STO pilot implementation	Stuttgart		19	36
6	Communication and Dissemination	ESTIF		1	36
7	Common dissemination activities	Ambit		1	36

The project work will be subdivided into seven separate work packages. Each work package represents a major and self-contained subdivision of the project involved and includes defined objectives, activities, deliverables and outcomes, as well as the definition of each partner's contribution, the time frame and foreseen resources. In order to assure an effective management and to monitor the progress of the project, the work packages are subdivided into different tasks, which are described below.

Every work package has a work package leader, who is responsible – besides the coordinator – for the cooperation and communication between the persons responsible for the different tasks of his work package. Every work package contains a strong cooperation, to exchange and to transfer the know-how between the translational partner organisations. Even if there are special conditions and frameworks in each partner country, the consortium will benefit from the cooperation on the European level. The exchange of experiences and the creation of innovative approaches, will lead to additional benefits for every project partner.

Within five specific work packages a multiple interaction between local implementation and European dissemination is organised aiming at the defined project objectives:

WP 2 aims at a basic initial analysis and an assessment of existing experiences on STOs (EU level) and of the the needs of the participating local authorities (local level) resulting in a set of requirements on what instruments have to be made available/developed in WP 3.

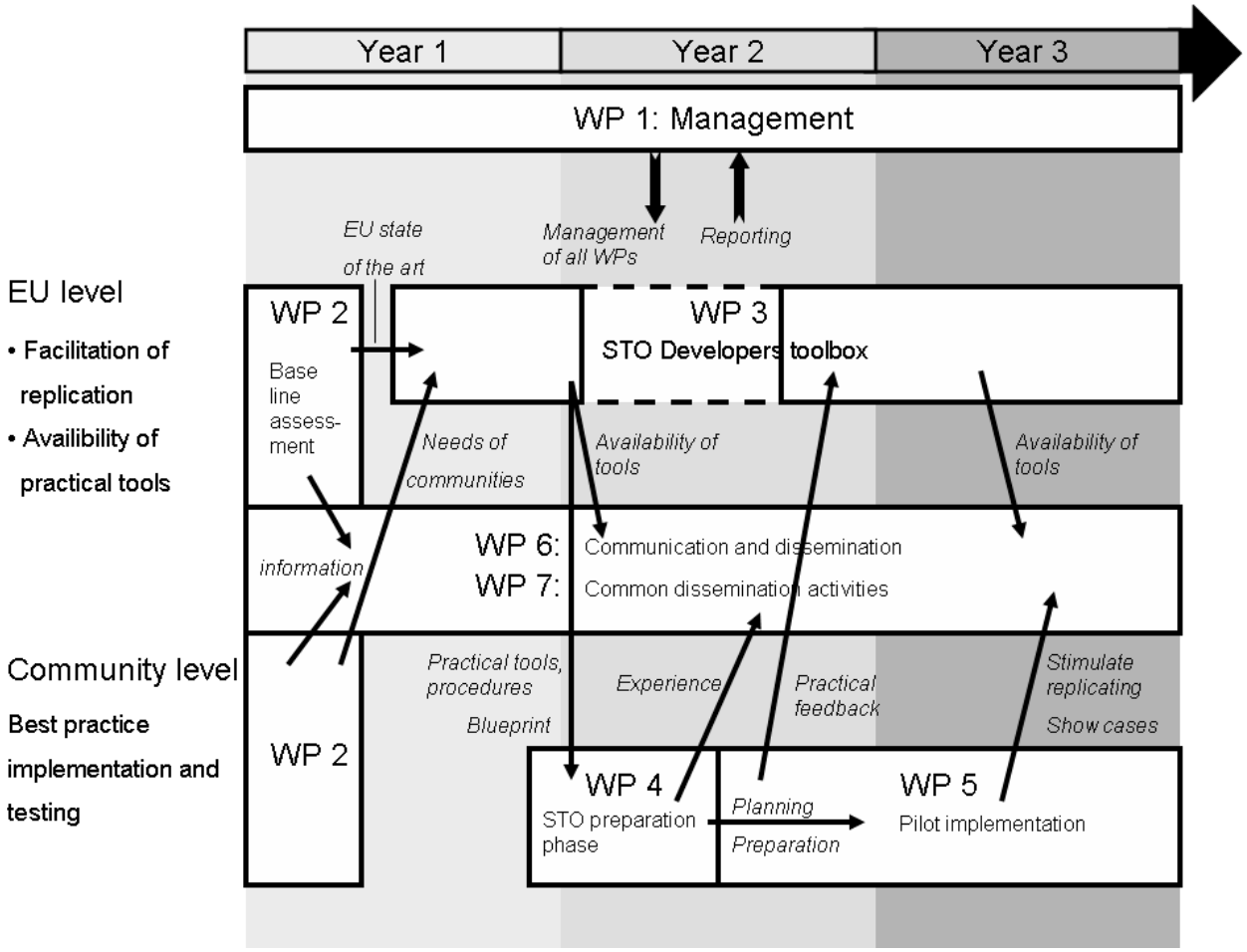
WP 3 aims at the availability of general STO instruments and tools, both, for the local implementation by the local authorities (WP 4 + 5) and for the dissemination at European level (WP 6 + 7). In a second phase these instruments will be optimised with feed-back from the pilot implementation at local level (WP 5).

WP 4 + 5 are the preparation phase and the pilot implementation of the local STOs of the participating communities. This pilot implementations are show cases and stimu-

late as such replication at European level (input to WP 6 + 7). They deliver valuable information on the suitability of the STO instruments (input to the second phase of WP 3).

WP 6: Dissemination is carried out throughout the whole project, at first on information level, at a second stage with real practical tools, experiences and services.

Project work flow chart



Task by task overview

WP 1 Management
Task 1.1 Consortium agreement
Task 1.2 Project Partner Committee
Task 1.3 Project meetings
Task 1.4 Online workspace
Task 1.5 Reporting

WP 2 Base line assessment
Task 2.1 STO state of the art in Europe
Task 2.2 European expert workshop analysing best practice STOs
Task 2.3 Identification of needs for successful STO implementation
Task 2.4 Assessment for each community

WP 3 STO developers toolbox
Task 3.1 STO best practices
Task 3.2 Model STO criteria and procedures
Task 3.3 Recommendations and references for flanking measures
Task 3.4 STO development blueprint

WP 4 STO preparation phase
Task 4.1 STO legal base
Task 4.2 Elaboration of an action plan of flanking measures
Task 4.3 Cost-benefit analysis
Task 4.4 Public hearing with the society groups concerned

WP 5 STO pilot implementation
Task 5.1 Pilot implementation
Task 5.2 Monitoring of the implementation
Task 5.3 Testing of STO tools

WP 6 Communication and Dissemination
Task 6.1 Implementation of a project website
Task 6.2 Production and Europe-wide distribution of dissemination materials
Task 6.3 National and international workshops
Task 6.4 Set-up of a international STO help-desk
Task 6.5 Preparation of a STO policy paper

WP 7 Common dissemination activities
Task 7.1 Contribution to the development of online information systems under IEEA management (e.g. project fact sheets, reports, slides, electronic deliverables, images) in the quality and form specified

Task 7.2 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

Task 7.3 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 IEEA

5.2. Work packages

WP No	**WP 1**	WP name	**Management**
Duration in months	36	WP leader	Ambiente Italia

Description of the work:

The objective of this work package is to manage the ProSTO project optimally. This includes managing the overall activities, the overall communication, the progress, the distribution of finances, the production of the deliverables and the reporting. Within this work package six project meetings are intended, including the kick off meeting.

Tasks:

1. Consortium Agreement

   A Consortium Agreement will be signed between the partners to secure a professional working co-operation and legal basis for each partner's responsibilities in the project. The agreement states the role of the Project Partner Committee and its voting procedures, the responsibilities of each partner regarding delivery of results and reporting inputs, actions to be taken if a partner defaults on his tasks, intellectual property rights and other administrative arrangements within the consortium.

2. Project Partner Committee

   The project partners will build a Project Partner Committee which is the main decision making body of the project. The project partner Committee is the project's central element for the exchange of experience, discussion, consensual decision-making and arrangements on the procedures and project results. The project Partner Committee meetings will be organized, prepared, chaired and documented by the project coordinator.

3. Project meetings

   A kick-off Meeting and five project meetings will be held in the course of the project (appr. every six months). These meetings will be the face-to-face platform for exchange and for organising cooperation between the partners. In case more consultations are needed, teleconferences will be deployed. The coordinator moderates the meetings and prepares the documentation.

4. Online workspace

   A reserved online workspace will be used as main communication tool between the project partners. This workspace will be a part of the project web site (see WP 6). All internal documents will be downloadable from this work space. An internal project partner mailing list service is included in the workspace.

5. Reporting

   An interim report and a final project report is handed to the European Commission, together with financial reports. Progress reports are elaborated for nine months intervals not covered by the interim and final report.

Outcome:

ProSTO is effectively implemented, administrated and managed. Also communication between the partners will be intense and efficient, stimulating the cooperation between them.

Deliverables:

D 1.1: Consortium agreement

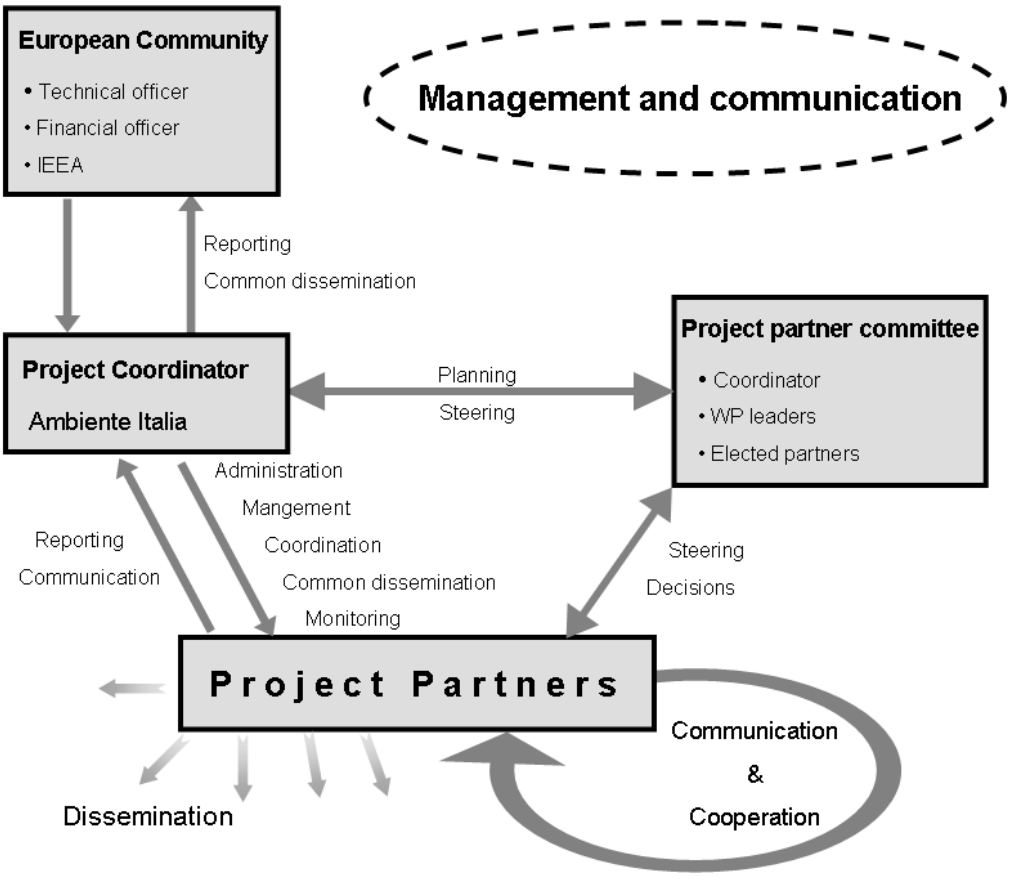
D 1.2: Six meetings and meeting reports

D 1.3: Online workspace

D 1.4: Two progress reports covering nine month periods

D 1.5: Interim report (technical and financial)

D 1.6: Final report (technical and financial)			
Role and contribution (tasks) of each partner:			
Participant	Role and contribution		Task No
Ambit	Overall project coordination Coordination and elaboration of all deliverables (D 1.1 to D 1.6)		all tasks
all other partners	Contributions to D 1.1 Attending of meetings, D 1.2 Contributions to all reports, D 1.4, D 1.5, D1.6		1, 3, 5
Major other specific costs (tasks and foreseen amount):			
Participant	Tasks		Foreseen amount
	no other specific costs foreseen		
Major subcontracts (tasks and foreseen amount, 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.			
Participant	Tasks	Organisation	Foreseen amount
	no subcontracts foreseen		



WP No	**WP 2**	WP name	**Base line assessment**
Duration in months	4	WP leader	INETI

Description of the work:

A thorough analysis of STOs is carried out in order to learn and benefit as much as possible from already existing experience. This analysis is not limited to technical aspects, but looks also in societal factors influencing the success or failure of STOs. Direct contact is created and a workshop is organised between the project participants and responsible persons of the most important STOs in Europe. On this base and taking into account their local particularities the participating communities can well define their requirements and needs to be addressed within the project and necessary for realising best practice STO. The assessment procedure developed in this work package is also of use for new communities interested in STOs. After this analysis phase all necessary information is available for creating efficient tools for STO facilitation (WP 3) and for preparing at local level the STOs in the communities participating in this project (WP 4).

Tasks:

1. STO state of the art in Europe

The objective of this task is to get an overview over existing STO cases on international level.

- inventory of all relevant cases of STOs and experiences, information, documents: Existing STO cases are researched. From all relevant STO cases documentation and information is asked, collected, viewed and analysed, in order to get a complete overview of international STO cases.
- horizontal evaluation of this inventory: Horizontal comparison of the STOs according to a matrix of characteristics and indicators. Identification of major similarities and differences, STO types or categories.

2. European expert workshop analysing best practice STOs

The objective of this task is to reach a maximum understanding of STOs in particular success and failure factors.

- deeper analysis of min 4 best practice STOs
- interviews with concerned persons
- identification of success factors and performance indicators

The in-depth analysis, the interviews and the direct contact with experts during the workshop leads to a maximum knowledge transfer from the existing best practice STO cases to the ProSTO project. In particular insider knowledge and soft factors become available to partners.

3. Identification of needs for successful STO implementation

The objective of this task is to identify on a **general level** what are the obstacles and needs of communities for implementing a STO.

- definition of elements necessary for a successful STO implementation based on the analysis in tasks 1 and 2, definition of a general ideal STO process model (structure of preparation and implementation phases) together with a set of requirements (e.g. local product and service availability, training structures, communication structures between involved partners etc) which should be fulfilled in communities were STOs are planned
- identification of the needs of communities for successful STO implementation

4. Assessment for each community

The objective of this task is to assess on a detailed and **specific level for each participating community** what are the obstacles and needs for implementing a STO.

- deciding on an assessment procedure for verifying the pre-conditions for the implementation of a STO in a community based on the requirements set-up in task 3. This procedure shall cover the whole range of influencing factors for STO (political, legal, societal, technical, economical etc.)
- each community carries out such an assessment of the base for developing a STO within its community boundaries

Outcome:

STOs are better analysed and understood and the needs of the communities identified. Requirements are defined on what instruments need to be developed in WP 3. An assessment procedure for analysing the local situation is available.

Deliverables:

D 2.1: Technical report on the state of the art analysis:

- state of the art of STOs in Europe
- results of the best practice analysis and the findings of the European expert workshop (task 2.2)
- definition of a STO process model
- set of success factors and performance indicators for STOs
- identified needs of the communities
- recommendations for STO tools to be researched or developed

D 2.2: European expert workshop and workshop report

D 2.3: Technical report on selected assessment procedures

D 2.4: Short report (mapping) of the local situation for developing a STO by each of the participating communities. This report presents the results of the assessment carried out by the participating communities as described in task 2.4.

Role and contribution (tasks) of each partner:

Participant	Role and contribution	Task No
INETI	WP coordination	all tasks
Ambit, SFZ Solites, INETI, Ecofys SL	Elaboration of the STO state of the art, analysis of best practice STOs, identification of success factors, elaboration of the assessment procedure D 2.1, D 2.3	1, 2
ESTIF, INETI	Organisation of the European expert workshop D 2.2	2
All partners	Participation at the workshop D 2.2	2
Stuttgart, Lisboa E-Nova, Murcia, Lazio, Giurgiu, Aster	Identification of needs for successful STO implementation, elaboration of the assessment procedure D 2.1, D 2.3	3
Stuttgart, Lisboa E-Nova, Murcia, Lazio, Giurgiu, Aster	Mapping of the local situation D 2.4	4

Major other specific costs (tasks and foreseen amount):

Participant	Tasks	Foreseen amount
ESTIF	cost for the workshop, allowances for invited speakers/participants	4000

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

Participant	Tasks	Organisation	Foreseen amount
	no subcontracts foreseen		

WP No	**WP 3**	WP name	**STO developers toolbox**
Duration in months	31	WP leader	Solites

Description of the work:

Based on the analysis and the identification of needs of the communities, the knowledge gained from the assessment in WP 2 is transferred into **a complete set of tools**, which facilitates the development and implementation of STOs by local authorities. These tools are of general use, i.e. they are useful for both the participating communities but also any external community reached by the dissemination activities of this project. These tools are:

- **a STO best practice database**. A set of best practices presented and disseminated will create confidence and motivate further communities to replicate STOs (task 1).
- the core of the toolbox will be **model texts, documents and references** which can be easily used as integral part of the STO laws or regulations. The idea is to as much as possible research, select and adapt criteria from already existing and harmonised European standards (e.g. EN standards, Solar Keymark). (task 2)
- A **catalogue of successful cases of flanking measures** (e.g. quality schemes, training measures) (task 3)

All tools and information is consolidated and structured:

1. in an internet base **STO developers toolbox**, i.e. a well structured download area on the project web site, and
2. in a **STO development blue print** (task 4), which will be a practical working document guiding communities through the process of developing and implementing a STO.

The STO toolbox is one of the major dissemination outputs of the project. Therefore, the downloadable STO tools will be presented on the website with high profile and in an appealing way.

Tasks:

1. **Set-up of a STO best practice database** as internet tool as part of the STO developers toolbox consisting of at least 10 best practice STOs. In this data base the specific characteristics of each individual best practice STOs are presented such as the motivation of local politicians, the experiences made, how the market developed, which flanking measures where implemented, which was the legal base and the administrative procedures of this individual STO, which technical criteria were required for installations etc.)

2. **Production of model documents for STOs as part of the toolbox**

The objective of this task is to provide a complete set of model documents which are generally needed by local authorities for the preparation of a local STO. In general these documents are:

- The local law document containing the obligation to install solar thermal systems itself

Several documents attached to the law, such as:

- A document specifying the quality requirements on the products (e.g. the collector has to be a certified product) or the quality criteria requirements on the installation (e.g. the installation has to be carried out by a qualified installer).
- A document with calculation procedures (e.g. 50 % of the hot water load shall be covered by the solar thermal system and the load shall be calculated according to EN standard)
- A document with procedures for quality control (e.g. a solar guarantied results contract has to be made for systems larger 100 kW_t)

In many STO cases of the past these documents were not of good quality and led to failure of the obligation or conflicts. The experts of this project will therefore prepare better model documents following the criteria below.

These model criteria and procedures included in the model documents will be of better quality than existing ones because they will follow the following approach:

- Technical criteria should refer as much as possible and be compatible with existing regulations and standards (EN standards, Solar Keymark). Hence no market barriers are created in Europe.
- They should be kept at the minimum necessary, in order to not overregulate the market, however, assure quality installations. Burocracy shall be limited.
- They should foresee only economically justifiable elements (e.g. no extensive and costly monitoring of

installed plants) and not bear unnecessary cost neither for house owners nor to administrations

These documents will be available as download from the toolbox part of the project web site and will be of general use for any local authority implementing a STO.

3. Elaboration of catalogue with recommendations and references for flanking measures as part of the toolbox

The objective of this task is to provide a catalogue with recommendations and references for flanking measures.

Flanking measures are activities by the local authority **that are not directly part of the STO** itself, but which are additional measures supporting the successful implementation of the STO. An example could be a series of training courses for the local professionals giving them the necessary preparation to deal with solar thermal plants. This catalogue will be a help for any local authority planning a STO. Also those local authorities outside the project. It will remain as a type of guideline also after the project. Wheras the five participating communities define their flanking measure in task 4.2. according to their local needs (-> action plan).

The **references** given in the catalogue enable the local authorities to find e.g. examples for such measures or service providers, which offer good quality services (e.g. training campaigning). The following list gives a summary of flanking measures which will be included as examples in the catalogue. The catalogue is of general use (like a guide line) and can be downloaded from the toolbox part of the project web site.

- communication measures with the society groups concerned (house owners, building sector, suppliers, installers, architects etc.)
- demand side measures (e.g. information and/or image campaign)
- supply side measures (training of municipality staff, training of professionals, marketing support, special offer agreements with suppliers or installing enterprises, guidelines on building integration)
- subsidies (also to applications not covered by the STO, in order to not disregard them)
- local best practice plants, e.g. on municipal buildings

4. STO development blueprint

- The blueprint is a document with a step-by-step process description on how to develop and implement a STO on local level. The blueprint will be a practical working document guiding through the STO process, integrating the results of the previous tasks of this WP, making reference to experiences made in the project, available tools, best practice examples and lessons learnt.
- The target group for the blueprint are administrations involved or interested in the development of a STO or other experts involved in this process.

Outcome:

Availability of practical and tested tools for the development and the implementation of STOs for use at European-wide level.

Deliverables:

D 3.1: Format for presenting STOs in the STO internet data base

D 3.2: Presentation of at minimum 10 best practices on the project web site (partially also in the brochure)

D 3.3: Complete set of model STO criteria and procedures (draft and final version)

- criteria and procedures for the obligation
- criteria for exemptions
- selection of calculation procedures
- quality assurance for both product and installation
- quality assurance for architectural integration and good system design
- function control of installed systems
- control procedures whether the obligation is followed

D 3.4: Catalogue with recommendations and references for flanking measures (draft and final version)

D 3.5: STO development blue print (draft and final version)

Role and contribution (tasks) of each partner:

Participant	Role and contribution	Task No
SFZ Solites	WP coordination	all tasks
Ambit, SFZ Solites, ESTIF	Format and questionnaire for STO best practices, internet presentation D 3.1, D 3.2	1
Ambit, SFZ Solites, SPES, Ecofys SL	deliver 10 best practice examples D 3.2 3 IT, 3 DE, 3 SP, 2 PT, 2 else	1
Ambit, SFZ Solites, INETI, Ecofys SL, Reseda, ESTIF, Aster	elaboration of tools (model STO criteria and procedures), elaboration of catalogue of flanking measures, D 3.3, D 3.4. The work sharing of this task will foresee complementary (and not parallel) working of the scientific partners on these deliverables (to be documented). This task represents a major effort of this project.	2, 3
Stuttgart, Lisboa E-Nova, Murcia, Lazio, Giurgiu	Review and comment the tools D 3.3, D 3.4	2, 3
Ambit, SFZ Solites, INETI, Reseda, Aster	Elaboration of the STO development blueprint, coordination by Solites, D 3.5	4

Major other specific costs (tasks and foreseen amount):

Participant	Tasks	Foreseen amount
Ambit, SFZ Solites, INETI, Ecofys SL, Aster	Cost for translation of D 3.3 and D 3.5 in the national languages	2800 €

Major subcontracts (tasks and foreseen amount, 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.

Participant	Tasks	Organisation	Foreseen amount
	no subcontracts foreseen		

WP No	**WP 4**	WP name	**STO preparation phase**
Duration in months	9	WP leader	Ecofys SL

Description of the work:

In this planning and preparation phase the participating communities elaborate their STOs, defining the legal base and the necessary administrative procedures of the STO, drafting the STO regulation text itself and defining an action plan of flanking measures. The tools developed in WP 3 will strongly facilitate this process regarding all technical aspects. Beyond the regulation itself the local authorities get also prepared for confronting reactions or resistances from the side of society groups concerned. Limited cost, shared benefits and early involvement of the relevant groups shall develop the STO versus a win-win-situation and social tenability. In this whole phase the scientific partners assist and train the staff of the community.

Tasks:

1. STO legal base

- elaboration of the legal base of the local STO regulation (e.g. national or regional law, local building code, town development plan, conditioned ground sales or lease)
- embedding of the STO into other present energy efficiency instruments e.g. EPBD, energy performance certificate for buildings
- legal verification of the legal base chosen
- drafting the STO
- elaboration of the administrative procedure for executing the STO

Note: In some of the partner countries national or regional STO regulation do already exist (e.g. Spain). However, also in these cases it is necessary to investigate, how this national regulations can be transferred to the local building regulation and administration procedures, which are in the competence of the municipalities. Respectively, feed-back is elaborated in order to render national regulation more suitable to the local legal instruments.

2. Elaboration of an action plan of flanking measures

- drafting of an action plan of flanking measures (minimum 2 years duration) adapted to the local situation (subsidies, tax breaks, information or image campaign on the demand side, awareness raising on the supply side, training measures, agreement with the sector professionals and enterprises etc.)
- gaining of partners among the stakeholders for these activities (e.g. sector associations, promoters)

3. Cost-benefit analysis

- internal cost-benefit analysis (for the administration)
- external cost-benefit analysis (for the community society in general and for the concerned house owners and building companies)
- social tenability, (the economic burden for citizens and enterprises in an acceptable frame , citiizens have to pay the solar thermal systems on their houses, which is a cost of about 2000-5000 €/family)
- indirect benefits of solar energy use (e.g. social effects, employment, decrease of pollution are also considered)

4. Public hearing with the society groups concerned

- series of hearings with the society groups concerned (house owners, building sector, suppliers, installers, architects etc.)
- revision of the STO according to the society feed-back

Outcome:

The local authorities have prepared all necessary documents and procedures for the STO. They have ready an action plan for supporting the implementation. Necessary communications and hearings with society group concerned have been carried out, in order to achieve a better acceptance and impact of the STO. The experience from this process at local level is available via summaries for dissemination.

Deliverables:

For each of the participating communities:

D 4.1: Technical report on the legal base of the STO and the link to other energy efficiency instruments, as well as the administrative procedures for each of the participating communities

D 4.2: Draft of the STO for each of the participating communities (complete set of draft documents)

D 4.3: Draft action plan of flanking measures (actions, partners, financing)

D 4.4: At least five hearings with society groups concerned

Common report:

D 4.5 Technical report summarising the cost-benefit analysis of the STOs in the communities

D 4.6 Technical report summarising the reactions and requests of the society groups in the communities

Role and contribution (tasks) of each partner:

Participant	Role and contribution	Task No
Ecofys SL	WP coordination	all tasks
Stuttgart, Lisboa E-Nova, Murcia, Lazio, Giurgiu	Elaborate legal base of the STO, legal verification, drafting of the STO, elaborate administrative procedure, elaboration of an action plan, cost-benefit analysis, hearings D 4.1 to D 4.6	1 to 5
Ambit, SFZ Solites, INETI, Ecofys SP, Reseda, Estif, Aster	Assist and train communities regarding deliverables D 4.1 to D 4.6 (e.g. adaptation of model documents and procedures to local conditions)	1 to 5
Ecofys SP	Coordination of technical reports D 4.5 and D 4.6	4, 5

Major other specific costs (tasks and foreseen amount):

Participant	Tasks	Foreseen amount
	no other costs foreseen	

Major subcontracts (tasks and foreseen amount, 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.

Participant	Tasks	Organisation	Foreseen amount
Lisboa E-Nova, Murcia, Lazio, Giurgiu	subcontract for an expert in administrative and construction law		Giurgiu, Lazio 2000 €, Lisboa E-Nova, Murcia 4000 €

WP No	**WP 5**	WP name	**STO pilot implementation**
Duration in months	19	WP leader	Stuttgart

Description of the work:

Implementation of the STO in each community within the bounds of the community's possibilities.

This implementation will work as field test for the best practice STOs developed in this project. All tools and procedures will be tested regarding their suitability and efficiency in practical use. Also the impact of the STO will be monitored as well as the public opinion and the feed-back of the professional groups concerned at that stage of implementation. The outcomes of this field test will result in further recommendations and a round of improvements of the tools developed in WP 3.

The success and the possibilities of implementation and the transferability of STOs strongly depend on the local boundary conditions and external factors. Some of these factors are in principle unforeseeable (e.g. political situation and decision making, development of the European and national legal boundary conditions, lobby and societal resistances).According to the individual conditions/political decisions it will come to a full or limited pilot implementation, e.g. in a limited area of the community or for a limited group (e.g. only new constructions or private buildings or public buildings). Further these individual characteristics will be analysed and described in order to understand how these can condition the implementation of STOs.

The concerned communities where the STOs will be implemented are: Municipality of Stuttgart, Municipality of Lisboa, Municipality of Murcia, Lazio Region and 20 selected Municipalities of the Lazio Region (378 municipalities, 5.4 Mio inhabitants) and Municipality of Giurgiu.

Tasks:

1. Pilot implementation

- implementation of the STO in each community within the bounds of the community's possibilities. According to the political decisions it will come to a full or limited pilot implementation, e.g. in a limited area of the community or for a limited group.
- implementation of the action plan of flanking measures (initial phase, i.e. the first year of the programme)

2. Monitoring of the implementation

- monitoring of the success of the STO according to the control mechanisms chosen
- public opinion survey
- opinion survey among professional groups concerned
- quantification of the STO impact

3. Testing of STO tools

- evaluation on the base of the practical use of the suitability and efficiency of the tools elaborated under WP 3 (STO developers toolbox)
- identification of strong points, weak points and possible improvements

Outcome:

Five best practice STOs are pilot implemented in the participating communities, monitored and evaluated. First figures on their impact are available. Experiences and lessons learnt are available for presentation and dissemination.

Deliverables:

For each community:

D 5.1: Pilot implementation of the STO (within the bound of the community's possibilities, full or limited implementation) through the appropriate legal means

D 5.2: Report on the performance of the flanking measures D 5.3: Technical report on the monitoring results and the STO impact achieved, experiences and lessons learnt

Common report:

D 5.4: Report on the experiences with the tools of the STO developers toolbox, improvements implemented

Role and contribution (tasks) of each partner:

Participant	Role and contribution	Task No
Stuttgart	WP coordination	all tasks
Stuttgart, Lisboa E-Nova, Murcia, Lazio	Implementation of the STO, performance of flanking measures, monitoring of the implementation D 5.1 to D 5.3	1, 2, 3
Ambit, SFZ Solites, SPES, Ecofys SP, Reseda	Assist communities regarding D 5.2 to D 5.3 In WP 5 the local authorities have to perform the practical implementation of the STO, i.e. the STO becomes a valid law/regulation/building code with all effects. In this critical moment the local authorities need a 'technical expert partner' at their side in order to be able to respond on public reactions. Further on the technical expert partners will take over the role as evaluators of the implementation, evaluating efficiency of the flanking measures and monitoring the impact of the STO (input to deliverables 5.2 and 5.3).	1, 2, 3
Solites	Coordination of the report D 5.4	3
ESTIF	Coordination of the report D 5.5	3

Major other specific costs (tasks and foreseen amount):

Participant	Tasks	Foreseen amount
	no other specific costs foreseen	

Major subcontracts (tasks and foreseen amount, 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.

Participant	Tasks	Organisation	Foreseen amount
Lisboa E-Nova, Murcia, Lazio, Reseda, Giurgiu	Cost related to print materials to be produced for local use within the pilot implementation phase Lazio () will print materials for distribution to all its municipalities	n.n.	Giurgiu 1280 Lisboa E-Nova, Murcia, Reseda, 2560 Lazio 18036
Stuttgart, Lisboa E-Nova, Murcia, Lazio, Giurgiu	Execution of flanking measures (e.g. qualification courses, information events, campaign activities, random controls, opinion surveys)	n.n.	Stuttgart 1920 Lisboa E-Nova, Murcia 11340, Giurgiu 2560 Lazio 5400

WP No	**WP 6**	WP name	**Communication and Dissemination**
Duration in months	36	WP leader	ESTIF

Dissemination approach:

The positive experiences made with the best practice STO implementations in the participating communities shall encourage a significant number of other European communities to follow these examples. The tested STO development tools made publicly available shall facilitate the replication. Beyond the creation of interest and providing information the dissemination foresees real support to interested countries and communities by a STO help desk run by ESTIF.

Target groups for dissemination:

Dissemination activities address the primary target group of the project as stakeholders for national and local STO implementation: national and local governments and authorities

Potential countries for STO replication are category I, II and III countries (see map)

Map: Priority EU countries for the application of Solar Thermal Obligations

Levels of dissemination:

1. Dissemination at local level
2. Dissemination at national level
3. Dissemination at European level

1. Dissemination at local level:

- Dissemination at local level is an integral part of the project. Local society groups concerned, professionals, enterprises and stakeholders are involved, heard and consulted right from the beginning of the STO development process, which might be the best way for locally disseminating project results. Local dissemination is crucial for the awareness and motivation raising at local level and thus for the success of the STO.
- The local authorities will use their natural channels for reporting projects results to the citizens (official publications, local press, own web page). Hearings of the society groups concerned are foreseen in WP 4.

2. Dissemination at national level:

National dissemination is aimed at stimulating and facilitating the replication of successful STOs by a significant number of other communities in the country. The positive experience and the availability of practical tools shall be communicated to potential interested communities. National dissemination will be performed mainly by the networks in which the participating communities are involved and event calendars to which dissemination activities

can be linked.

Creating interest:

- Breaking news on the experiences made with the STO in the local community in media relevant to the national target
- Leaflets to be distributed at events relevant to the national target

Information:

- Translation and adaptation of the main pages of the project web site into national language and active linking of the web page to relevant national web pages
- Presentation of the project results on national conferences and in national press
- Feed-in of the newsletter into national networks
- Public availability of the project deliverables, in particular the STO tools through the project web site
- Public availability of the national best practice STO implementation through the project web site
- National workshops on STO implementation

Further support:

- Referring of interested communities to the STO helpdesk run by ESTIF

Commission level:

- Influence on European and national policies in order to make STOs legally possible everywhere in Europe and to encourage their implementation (e.g. RES-H directive)

National/international networks and dissemination networks used by the participating communities are:

Stuttgart

- Stuttgart is member of the Deutscher Städtetag (German Association of Cities) on regional level (Baden-Württemberg) and national level.
- Stuttgart participates at the Conference of the municipal offices for the environment
- Stuttgart is member of the energy efficiency working party of German large cities
- At European level Stuttgart is member of the Council of European Municipalities and Regions (CEMR), Stuttgart's Mayor, Wolfgang Schuster, is president of the German section of CEMR, Stuttgart is active in CEMR's energy sector

Lisbon

- Lisboa E-Nova Website
- Lisboa E-Nova Newsletters (monthly)
- Lisboa E-Nova “Ponto de Encontro” (“Meeting Points”) - Open meetings with the citizens to present and discuss sustainability issues (1 meeting/week)
- Conferences (at least 2/year), Workshops (at least 4/year) and Exibitions (at least 1/year) organised by Lisboa E-Nova
- Events for which Lisboa E-Nova is invited (aprox. 1/month);
- Press partners activities (Construction, Arquitecture and Environment Magasines, Newspapers, …)
- Lisboa E-Nova Associates, who are active in very distinct sectors: e.g. ADENE – Agência para a Energia (National Energy Agency), DECO- Associação para a Defesa do Consumidor (Consumer Rights Association), EDP Energias de Portugal (National Energy Utility – Electricity Distribution and Production), EPUL - Empresa Pública de Urbanização de Lisboa (Lisbon Municipal Property Developer), Transgás – Sociedade Portuguesa de Gás Natural (National Energy Utility – High Pressure Distribution of Natural Gas)

Murcia

- Murcia is part of the Executive Committee of the Spanish Network of Cities for Climate
- Murcia is member of the Spanish Federation of Municipalities and Provinces (FEMP)
- Murcia is member of Eurocities Network's Environment Forum
- Murcia, through the commitments undertaken in the Charter of Aalborg (signed by the council in 1998) and Murcia’s Local Agenda XXI the Council hopes to make a special contribution to local strategies of sustainability, mobility guidelines and global climatic change.
- Ecofys SL supports the municipality of Murcia through its good contacts to Spanish authorities (Calatunya, Andalusia and Basque country) as well as its international branch offices of Ecofys

Lazio

- Lazio Region develops this project mainly for serving the communes within the region. All results and deliverables will be disseminated to all 377 municipalities in Lazio.

Ambiente Italia assists Lazio through the following channels:

- Ambiente Italia cooperates directly as environmental consultant and research institute for more then 100 municipalities, more then 40 provinces and 11 regions
- Membership of the national association for the coordination of the italian local AGENDA 21, involving about 300 local authorities
- Information feed-in for about 20 newsletters, with regional as well as national sprawling (e.g. newsletter ISES, Eco dalle città, Kyoto Club, Climat Alliance, Regioni e Ambiente, CLEAR campaign...)

Giurgiu

- The Association of the Romanian Municipalities
- The Federation of Romanian Local Authorities
- The League of Danube Counties
- Giurgiu is a twin city with the cities of Dunaivarosz (Hungary), Ismail - Ukraine, and Rousse - Bulgaria

3. Dissemination at European level:

Dissemination at European level is aimed at making the project and its results known in other countries and to stimulate and facilitate the replication of successful STOs by a significant number of European communities. The positive experience, the availability of practical tools and real support by and international help desk shall be communicated to potential interested communities.

European dissemination will be coordinated by ESTIF. It will be performed mainly by the international networks in which ESTIF and the participating communities are involved and event calendars to which dissemination activities can be linked.

Creating interest:

- International project newsletter
- Leaflets to be distributed at events relevant to the international target

Information:

- International project web site
- Public availability of the project deliverables and tools through the project web site
- International workshops

Further support:

- Creation and maintenance of a STO help desk giving direct support to interested communities
- Availability for national workshops in interested countries on request (not included in the project budget)

ESTIF itself will use the following communication channels for dissemination:

- ESTIF has more than 80 members (manufacturers, national solar thermal associations, suppliers and service providers to the sector), which collectively make up over 90% of the European solar thermal market turnover.
- ESTIF's well uptodate contact database contains more than 2000 contacts of which more than 1000 relevant contact persons from industry, associations, research institutes and policy makers.
- ESTIF hosts the bi-annual European Solar Thermal Energy Conference (estec), which took place already in 2003 and 2005 in Freiburg. More than 250 persons attended the last edition and ESTIF expects more than 300 participants at estec2007 and even more for 2009.

Tasks:

1. Implementation of a project website

The website is the major information and communication platform of the project. It is set-up as a professional, high profile and user-friendly website and is shaped to directly address the primary target group of the project (local authorities). It is regularly updated with news, information and project results. All public

deliverables are available as download from the website. The 'STO Toolbox' (see WP 3) is one of the major dissemination outputs of the project. Therefore, the downloadable STO tools will be presented on the website with high priority and in an appealing way. The website will be programmed in a content management system in order to allow content uploading by all partners. The website includes a work space reserved for the project partners. The main website will be in English language. Most relevant pages are available in the national languages of all countries participating (national dissemination). A main communication sub-site will be installed on the ESTIF website.

- Design and layout of the project website
- Draft and insert content
- Launch and maintain the website
- Monitoring of the site visits

2. Production, national and Europe-wide distribution of PR and dissemination materials

- press articles and press releases are produced and launched at national (at least 10 per country) and European level(at least 5 in total).
- A leaflet is produced in English language and each partner country language. The leaflet is targeted to interested local authorities and is used for national and international dissemination. It is distributed via the partner's national and international networks and let at events and conferences.
- A high quality brochure is produced in English language. The brochure promotes STOs by mainly presenting practical experiences made in best practice STO implementations from the view point of local authorities. The tools and services developed in the ProSTO project are presented in order to stimulate the website visits. The brochure will be 12-16 pages, four-color-printing, 4000 copies as well as an e-brochure version for the website and for mailings. It is distributed via the partner's national and international networks and let at events and conferences (600 copies per participating community + ESTIF).
- Five Project e-newsletters inform about STO related news and recent developments, project activities, results and events. The newsletter promotes the tools and services developed in the ProSTO project. The newsletter is distributed through the national and international networks of the partners.

3. National and international workshops

- In each participating country two national half-day workshops are organised with national policy makers and multipliers. In these workshops the project results are presented and discussed in order to share experiences, to stimulate replication and to activate a thematic work group on national level.
- One thematic expert workshop at European level addressed to STO experts, policy makers and multipliers will be used to discuss the project results and specific experiences. The workshop will be used to find a common view point regarding STOs and to commonly develop ideas for further promoting and creating STOs on the EC and national level.
- Two dissemination workshops will be held in countries not participating in the project.

4. Set-up of an international STO help-desk

ESTIF installs a help-desk that gives help to communities seeking for support on the implementation of STOs. The help-desk can be contacted by telephone or email. ESTIF delivers first information and documents and refers to experts for detailed support if necessary

5. Preparation of a STO policy paper

The policy paper is addressed to national and European policy makers. Its aim is to propose modifications or improvements to actual European and national regulations which could lead to or positively influence the legal situation in order to first make STOs legally possible everywhere in many European countries or secondly create STO-favourable conditions in those. The recommendations are based on the practical experiences made in this project.

Outcome:

Thousands of communities are informed about the show cases in the five participating communities. In case of interest the new communities find concrete support for proceeding with an own STO implementation.

Deliverables:

D 6.1: Project website

D 6.2: Documentation of national (at least 10 per country) and European (5 in total) press articles D 6.3: Project

leaflet targeted to local authorities, EN and all national languages

D 6.4: Five Project e-newsletters, EN

D 6.5: Brochure and e-brochure on STOs in Europe, EN

D 6.6: Presentation on national (3 per partner country) and presentations on international conferences (3 international conferences in total) D 6.7: Two national workshops in each country participating targeted to interested local authorities

D 6.8: International workshop

D 6.9: International STO help desk

D 6.10: Two dissemination workshops in countries not participating (central Europe and south-eastern Europe)

D 6.11: STO policy paper

Role and contribution (tasks) of each partner:

Participant	Role and contribution	Task No
ESTIF	WP coordination	all tasks
AI	Creation and maintenance of the project website	1
ESTIF	Coordinate the production of the project leaflet, brochure and newsletter	2
All partners	Contribute contents to the project website, project leaflet, newsletter	1, 2
Ambit, SFZ Solites, INETI, Ecofys SL, Reseda, ESTIF, Aster	Content management of the national web pages, translation of materials	2
All partners	Maintain the dissemination activities throughout the whole project, presentation at conferences	all tasks
Stuttgart, Lisboa E-Nova, Murcia, Lazio, Giurgiu	National workshops	3
ESTIF	International expert workshop, two international dissemination workshops	3
ESTIF	Creation of the STO help desk	4
ESTIF	Coordination of the STO policy paper	5

Major other specific costs (tasks and foreseen amount):

Participant	Tasks	Foreseen amount
Stuttgart, Lisboa E-Nova, Murcia, Lazio, Giurgiu, ESTIF	Cost for distribution of materials	500 per partner
Stuttgart, Lisboa E-Nova, Murcia, Lazio, Giurgiu, ESTIF	Cost for workshops	500 per partner ESTIF 1500

Major subcontracts (tasks and foreseen amount, 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.

Participant	Tasks	Organisation	Foreseen amount
Ambit	Graphic support for the development of project logo and style sheets	n.n.	1500
Ambit	Preparation of the project website	n.n.	5000
ESTIF	Cost related to the layout and print of the brochure (4000 pieces)	n.n.	5000
Stuttgart, Lisboa E-Nova, Murcia, Lazio, Giurgiu, ESTIF	Cost related to print materials (1000 leaflets per country, 2000 leaflets in english) for national and international dissemination	n.n.	3000 per partner

WP No	**WP 7**	WP name	**Common dissemination activities**
Duration in months	36	WP leader	Ambiente Italia

Description of the work:

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

Tasks:

- Task 1: Contribution to the development of online information systems under IEEA management (e.g. project fact sheets, reports, slides, electronic deliverables, images) in the quality and form specified
- Task 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
- Task 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 IEEA

Outcome:

- 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

Deliverables:

- Inputs to the IEEA 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
- Project presentations and background material presented at information and dissemination events including feedback analysis thereof
- Inputs to common presentation material related to IEE actions, such as articles for newsletters, posters, interviews, visuals

Role and contribution (tasks) of each partner:

Participant	Role and contribution	Task No
Ambiente Italia	Elaboration of D 7.1 to D 7.3	all
WP leaders	Contributions to D 7.1 to D 7.3	all

Major other specific costs (tasks and foreseen amount):

Participant	Tasks	Foreseen amount
	no other specific costs foreseen	

Major subcontracts (tasks and foreseen amount, 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.

Participant	Tasks	Organisation	Foreseen amount
	no subcontracts foreseen		

5.3. List of deliverables and schedule

5.3.1. List of deliverables

All public deliverables are available as downloads from the project website.

Deliverable No	WP No	Deliverable name	Type of deliverable	Size/form	Lanuage(s)	Target group	Lead participant	Dissemination level	Month of completion
D 1.1	1	Consortium agreement	Document	1 agreement	EN	Project partners	Ambiente Italia	CO	4
D 1.2	1	Six meetings and meeting reports	Report	6 reports	EN	Project partners	Ambiente Italia	CO	2, 7, 14, 21, 28, 35
D 1.3	1	Online workspace	Website	Website	EN	Project partners	Ambiente Italia	CO	4
D 1.4	1	Two progress reports covering nine month periods	Report	2 reports, pdf	EN	IEEA	Ambiente Italia	CO	9, 27
D 1.5	1	Interim report (technical and financial)	Report	1 report, 30 pp	EN	IEEA	Ambiente Italia	CO	18
D 1.6	1	Final report (technical and financial)	Report	1 report, 50 pp	EN	IEEA	Ambiente Italia	CO	36
D 2.1	2	Technical report on the state of the art analysis	Report	1 report, 30 pp, pdf	EN	project partners, local authorities, experts	INETI	PU	5
D 2.2	2	European expert workshop and workshop report	Full day event and report	1 report, 10 pp, pdf	EN	project partners, local authorities, experts	ESTIF	PU	4
D 2.3	2	Technical report on selected assessment procedure	Report	1 report, 15 pp, pdf	EN	project partners, local authorities, experts	INETI	PU	5

D 2.4	2	Short report (mapping) of the local situation for developing a STO by each of the participating communities	Report	1 report per community, 15 pp, pdf	ES, PT, IT, RO, D + EN summary	project partners, local partnership, local authorities	Communities	PU	5
D 3.1	3	Format for presenting STOs, questionnaire for a best practice survey	Document	1 document, 5 pp, this was only a comment	EN	project partners, local authorities, input to brochure	Solites	PU	7
D 3.2	3	Presentation of at minimum 10 best practices on the project web site (partially also in the brochure)	Project website	Project website	EN, D, ES, PT, IT, RO	potential replicators, local authorities, multipliers	Solites	PU	10 first 5 sets 33 completed
D 3.3	3	Complete set of model STO criteria and procedures (draft and final version)	Technical model documents	Documents 120 pp, pdf	EN, summary document (10 pp) in D, ES, PT, IT, RO	local authorities, administrations, experts, multipliers, local partnership	Solites	PU	10 draft, 36 final version
D 3.4	3	Catalogue with recommendations and references for flanking measures (draft and final version)	Technical document	1 document 80 pp, pdf	EN, executive summary in D, ES, PT, IT, RO	local authorities, administrations, experts, multipliers, local partnership	Solites	PU	10 draft, 36 final version
D 3.5	3	STO development blueprint (draft and final version)	Technical document	1 document 60 pp, pdf	EN, D, ES, PT, IT, RO	local authorities, administrations, experts, multipliers, local partnership	Solites	PU	12 draft, 36 final version
D 4.1	4	Technical report on the legal base of the STO and the link to other energy efficiency instruments, administrative procedures for each of the ommunities	Report	1 document per community	ES, PT, IT, RO, D + EN summary	local authorities participating, local partnership	Ecofys SL	PU	14
D 4.2	4	Draft of the STO (complete set of draft docu-	Document	1 set of documents	EN, ES, PT, IT, RO, D +	local authorities participating, local	Ecofys SL	PU	18

		ments) for each of the participating communities		per community	EN summaries	partnerships			
D 4.3	4	Draft action plan of flanking measures (actions, partners, financing)	Document	1 set of documents per community	EN, ES, PT, IT, RO, D + EN summaries	local authorities participating, local partnership	Ecofys SL	PU	18
D 4.4	4	At least five hearings with society groups concerned	Events + reports	5 reports, pdf	EN, ES, PT, IT, RO, D + EN summaries	local authorities participating, local partnerships, potential replicators	Ecofys SL	PU	18
D 4.5	4	Technical report summarising the cost-benefit analysis of the STOs in the communities	Report	1 summary report, 15 pp, pdf	EN	local authorities participating, local partnerships, potential replicators	Ecofys SL	PU	18
D 4.6	4	Technical report summarising the reactions and requests of the society groups in the communities	Report	1 summary report, 15 pp, pdf	EN	local authorities participating, local partnerships, potential replicators	Ecofys SL	PU	18
D 5.1	5	Pilot implementation of the STO (within the bound of the community's possibilities, full or limited implementation) through the appropriate legal means	Event + report	1 report per community, 20 pp, pdf	EN	local authorities, experts, potential replicators	Stuttgart	PU	33
D 5.2	5	Report on the performance of the flanking measures	Event + report	1 report per community, 15 pp, pdf	EN	local authorities, experts, potential replicators	Stuttgart	PU	33
D 5.3	5	Technical report on the monitoring results and the STO impact achieved	Report	1 report per community, 15 pp, pdf	EN	local authorities, experts, potential replicators	Stuttgart	PU	33
D 5.4	5	Report on the experiences with the tools of the STO developers toolbox, improvements	Report	1 report, 20 pp, pdf	EN	local authorities, experts, potential replicators	Solites	PU	24

		implemented							
D 6.1	6	Project website	Project website	Project website	EN, ES, PT, IT, RO, D	complete primary and secondary target group of the project, project partners	AI	PU	4
D 6.2	6	Documentation of press articles	Collection of press articles	1 collection per community, 1 at international level	ES, PT, IT, RO, D, EN	potential replicators on national level	ESTIF	PU	34
D 6.3	6	Project leaflet targeted to local authorities, EN and all national languages	Leaflet	1000 leaflets per country, 2000 in English	EN, ES, PT, IT, RO, D	complete primary and secondary target group of the project, project partners	ESTIF	PU	12
D 6.4	6	Five Project e-newsletters, EN	Document	e-newsletter 8 pp	EN, D, ES, PT, IT, RO	complete primary and secondary target group of the project, project partners	ESTIF	PU	6, 12, 18, 24, 30, 36
D 6.5	6	Brochure and e-brochure on STOs in Europe, EN	Document	4000 high quality image brochures, 4 colour print, print and pdf	EN, D, ES, PT, IT, RO	complete primary and secondary target group of the project, project partners	ESTIF	PU	20
D 6.6	6	Presentation on national and international conferences	Presentations at conferences + feedback report on in total 18 presentations	Summary report, 6 pp, pdf	EN	project partners, IEEA	ESTIF	PU	34
D 6.7	6	Two national workshops in each country participating targeted to interested local authorities	½ day events + reports	2 reports per country, pdf	EN, ES, PT, IT, RO, D + EN summary	local authorities, experts, primary and secondary target groups	ESTIF	PU	14, 33
D 6.8	6	International workshop	Full day event +	1 report, pdf	EN	Selected EU strat-	ESTIF	CO	28

			report			egy group			
D 6.9	6	International STO help desk	Event, report on the advises performed	1 report, pdf	EN	project partners	ESTIF	CO	34
D 6.10	6	Two dissemination workshops in countries not participating (central Europe and South-Eastern Europe)	½ day events + reports	2 report, pdf	EN	project partners	ESTIF	PU	21
D 6.11	6	STO policy paper	Political position paper	Position pa-per, 4 pp, pdf	EN	policy makers	ESTIF	PU	24

5.3.2. Schedule

WP / 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	31	32	33	34	35	36
WP 1:	Management																																				
WP 2:	Base line assessment																																				
WP 3:	STO developers toolbox																																				
WP 4:	STO preparation phase																																				
WP 5:	STO pilot implementation																																				
WP 6:	Communication and Dissemination																																				
WP 7:	Common dissemination activities																																				
Project meetings		x					x							x							x							x						x			
Project reports to EU										PR									IR									PR									FR
Project deliverables			D 1.2		D 1.1 + D 1.3 + D 2.2 + D 6.1	D 2.1 + D 2.3 + D 2.4	D 6.4	D 1.2 + D 3.1			D 3.2 + D 3.3 + D 3.4		D 3.5 + D 6.3 + D 6.4		D 1.2 + D 4.1 + D 6.7				D 4.2 - D 4.6 + D 6.4		D 6.5	D 1.2, D 6.10			D 5.4 + D 6.4 + D 6.11			D 1.2 + D 6.8			D 6.4			D 3.2 + D 5.1 - D 5.3 + D 6.7	D 5.5 + D 6.2 + D 6.6 + D 6.9	D 1.2	D 3.3 + D 3.4 + D 3.5 + D 6.4

Note:

The submission deadlines for reporting is fixed in the grant agreement (PR/IR within 1 month after the end of the period). The submission deadline for the FR is month 38 at the latest (60 days after the end of the action) but no cost will be claimed for these 2 months.

5.4. Performance indicators

Performance indicator	Quantification of success	Related work package and/or deliverable No
Quality of the management	Technical progress reports; Interim report, Final report, all reports submitted in time and accepted	WP 1, D 1.1 – D 1.6
Quality of the STO developers toolbox	More than 100 downloads of tools or of the STO development blueprint by relevant stakeholders > 70 % of the evaluations by the participating communities positive	WP 3, D 3.2 - D 3.5
Quality of the STO pilot implementation	5 pilot implementations of STOs Measurable impact of the STO on the local ST market (growth rate 30 % higher than average) > 70 % of the responses of the opinion surveys positive, good acceptance by the market actors	WP 4 + 5, D 5.1 - D 5.5
Quality of the dissemination of results	More than 6000 visits by different visitors to the information part of the project website (downloads see above) Conference presentations in front of more than 4000 persons 10 national and 2 international dissemination workshops with in total more than 300 participants 1 international expert workshop with more than 30 participants More than 40 concrete advises given by the STO help desk More than 10 new European local authorities starting concrete implementation of the implementation of a STO	WP 6 + 7, D 6.1, D 6.6 - D 6.11