

PROJECT AREA	Lighting: Replacement Incandescent Lamp – Future Bulb	Wet Appliances: Drier Promotion Competition	Copiers: Copier of the Future	Consumer Electronics: Energy Efficient TV sets, decoders etc.	Vending machines	Industrial Motors and Components: IEA Hi-Motors Competition	LED Traffic Lights
1. Main goals	30% more efficient 3,000 burning hours LCC goal Dimmable, appearance as GLS lamp	50% energy reduction on household electric tumble driers, maximum price.	Low-power standby mode >90% energy reduction, total direct energy reduction >60%. Short recovery time.	Reduction of electricity consumption by procurement or other more informative actions supporting other ongoing projects.	Energy-reduction opportunities for future actions: Cold-drink machines 60%; Hot-drink machines 30%.	Decrease losses 20-40% compared to average motors. Price & performance level guaranteeing long-lasting significant market share.	Reduced energy by 35-90%, longer life, LCC goals. Reduced costs for service and maintenance. Goal: pay-back time 1-5 years.
2. Project Manager	Project Manager Paul Davidson, UK. Project Co-ordinator Nils Borg, Sweden.	René Kemna, The Netherlands. Alternate: H-P Siderius, The Netherlands.	Rachel Schmeltz, Alison ten Cate, USA. Bernard Aebischer, Switzerland (during 1 st part of project)	Olof Molinder, Sweden (during introductory phase)	Eva Lembke/Preben Munter, Denmark (temporary, 1 st phase)	Heikki Härkönen, Finland.	Nils Borg, Sweden, on behalf of Swedish cities and in collaboration with The Netherlands
3. Interested countries	United Kingdom, Finland, The Netherlands, Sweden supporting ongoing US/DoD project.	The Netherlands, Sweden, United Kingdom, Spain, Finland, Denmark	Finland, The Netherlands, Sweden, Switzerland, United Kingdom, United States, Support: European Commission	Sweden, United Kingdom; Netherlands, United States (supportive participation) European Commission	Denmark, The Netherlands, USA (support.). Design competition planned in US for universities etc.	Finland as main actor; The Netherlands, United Kingdom, Denmark, Sweden, European Commission	The Netherlands, Finland, Sweden, United Kingdom, in collaboration with CEE in United States.
4. Technical specialists	Francis Rubinstein, LBNL, United States David Loe, United Kingdom	Jury: A. Klag, UK, H. Goerlitz/K. Koeppe, Germ. A. Horowitz, Sweden P. Terpstra, The Netherlands	Peter Jeanmaire, France Jeff Harris, US, Peter Hill, UK, Bruce Nordman, US, Göran Bryntse, Sweden.	Chris Evans, Consumer Association, United Kingdom.	Preben Munter, SEAS, Denmark.	Jorma Haataja and Juha Pyrhönen, Laapeenranta University of Technology, Finland.	Within City of Stockholm, Lighting Research Centre (Troy, NY, USA), National Road Administrations, technical consultants, user studies.
5. Project Status: - Preliminary studies - Performance spec. - Buyer groups	Ready Draft Oct. 96, final Apr. 97 Governments, housing comp., retailers, electric utilities	Ready February 1997 Retailers, utilities, housing and mail order companies; Workshop Nov. 15 1996	ZESM feasibility study ready September 1998 Governments, banks, insurance companies, universities, large corporations.	Partly ready. Developed for TV-sets. Hotels TV-set rental firms Procurement power supplies suggested by EC Nov. 97	Partly ready. Universities, hotel chains, governments, coffee and softdrink distributors.	Ready Ready June 1997 More than 30 industrial companies in Finland. No similar group in other countries.	Sept. 1999 Oct. 1999 - Nov. 2000 Sept. 1999 - Oct. 2000
6. Official pre-information	EU "Official Journal" 29 March 96 and 16 Apr. 97	EU "Official Journal", 15 May 1996	EU "Official Journal", 31 July 1996			EU "Official Journal", 19 September 1996	EU "Official Journal", 15 April 1999
7. Manufacturer contacts	At Hanover Fair 23 April 1996, and Hanover Fair 16 April 1997	Informal meetings 1996, 15 November 1996; Domotechnica Fair, Cologne, 19 February 1997	Meeting: Stockholm Sept. 11, 1996, Washington D.C. Dec. 2, 1997, Sept. 10, 1998 19 February 1997	General information at office equipm. Conferences & projects. EC/SAVE study /seminar Florence Nov. 97		Information meetings in connection with motor conferences in Lisbon Oct. 96 and in UK in Sept. 97	Important to have early and neutral contacts. Kick-off meeting in Stockholm, Sept. 1999
8. Call for tenders	Apr. 97 Hanover Fair, reissue Dec. 97, deadline Dec. 1998.	February 1997 at the Domotechnica Fair, Cologne.	September 22, 1998			24 June 97 on website; closing date opening round 15 Aug 98	June 2000 – Jan. 2001
9. Evaluation of bids and prototypes	Dec. 1998. Planned to start after receipt of poss. tenders.	Summer 97 – Winter 1998 (1 Jan. 1999)	Through Sept. 2000, accepting tenders every 6 th month.			15 Aug. 98 - 7 Dec. 98 (publ. jury report) Winner announced Feb. 99.	Sept. 2000 – April 2001
10. Products on market	During 2000	1997 – 1999	September 2001			Available on request	Sept. 2000 – 2002
11. Other information	The Buying Agency (TBA) in the UK willing to assist with call for tenders. No entry fulfilled all criteria. In a magazine a prototype presented Nov. 1999.	AEG 1 st Round Award Winner fulfilling all mandat. requirem. Ceremony 27 April 98. Start of Final Round Spring 98 closing date 1 Jan. 99. No entry in Final Round but a new product "Eco Dryer" launched in 99. Cost reducing program 2000 and prolonged campaign price.	Documentation available at: http://www.epa.gov/appdsta/r/esoe/techpro.html Ricoh 1 st Round Award Winner, Ceremony at COMDEX/Fall, Las Vegas, 16 Nov. 1999. Prototype and Award on show at CeBit, Fair, Hanover, Feb. .2000.	No pos. Reactions by Oct. 96 from US hotels. Project in rest mode. 2 procurement areas identified in EC/SAVE. Meetings 98-99 re opportunities. IEA workshop Paris Jan. 1999, Brussels Jan. 2000.	Testing method to be defined. Denmark stated March 97 no possibility to take Project Management. Project in rest mode.	Documentation available at: http://info.lut.fi/ente/sahko/Hi-Motors/Intro.htm Presentation at EEMODS, London, Sept. 1999. ABB Award Winner, Ceremony 24 Feb. 1999 at Annex III Workshop, London.	Two efforts: Short run: replacement lamps, further investigation, Local procurement activities Long run: Whole systems PM Sweden/The Netherlands

OVERVIEW OF ANNEX III EFFORTS

Compilation based on information supplied for the "End of Term Report for the IEA Demand-Side Management Programme", February 1998.

Industry participation in Annex III Meetings in 1997:

Industry representatives participating in formal Task Experts Meetings 0 out of 29

6 of 14 Annex III Experts had earlier industry background

Industry attendance at Seminars (open meetings) 740

Attendance by representatives from equipment supply companies at Task Meetings and/or Seminars 60

<u>Annex III meetings in 1997:</u>	Number of meetings	Number of participants
Technical Meetings and Workshops	2	29
Seminars and Conferences	12	300

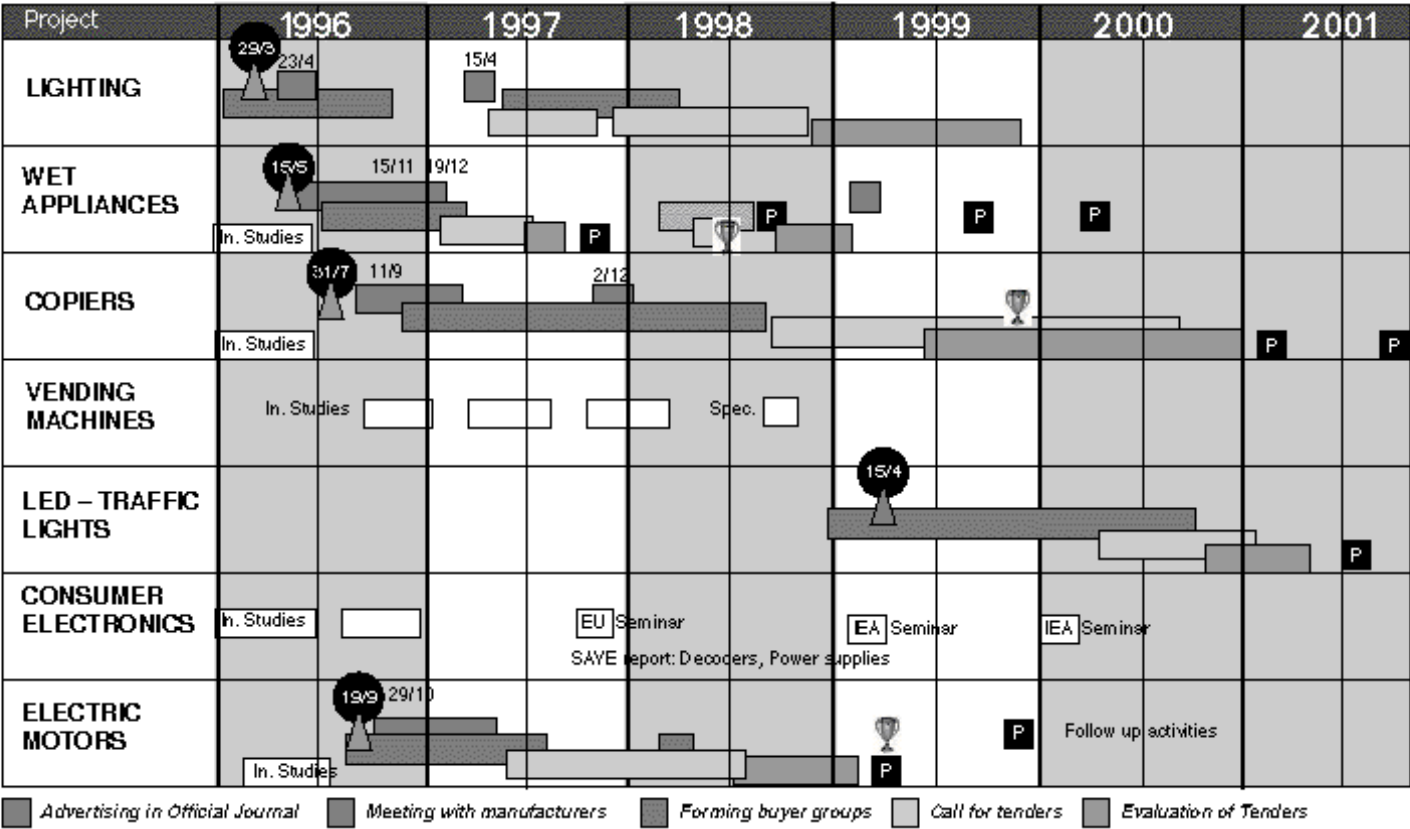
Annex III cost-sharing in 1997: USD 130,000

Annex III task-sharing in 1997: USD 550,000 33 person-months

Jan 28, 2000

PROMANDAT AB

ANNEX III – PROCUREMENT PROJECTS Time schedule 1996–2001



ANNEX III – LIST OF REPORTS

Examples of reports, working documents, specifications, competition documents and information material prepared by the Operating Agent and by/for the Experts during the years 1994 – 1999.

1994

- *Technology Procurement - Examples of Specifications of Requirements*, by Hans Westling, Promandat AB, Sweden: *Part 1* - February 1994, *Part 2* – September 1994.
- Material for overhead projection with *a summary of U.S. activities update about technology purchasing* prepared by Jeffrey Harris, LBNL, United States, March 1994.
- *Case Study - Clothes Washers and Dryers for Laundry Rooms in Apartment Blocks -Sweden*, report by Hans Westling, Promandat AB, Sweden, April 1994.
- *Technology Procurement for Household Appliances*, draft report by the Danish Energy Agency, Denmark, May 1994.
- *Product Specifications in the Netherlands, in terms of energy-efficiency, relevant to Annex III*. Van Holsteijn en Kemna, Netherlands, June 1994.
- *Accelerating the Development of High Efficiency, Dedicated Residential Compact Fluorescent Fixtures*, draft by Michael Siminovitch, Francis Rubinstein and Evan Mills, LBNL, United States, August 29, 1994.
- *Market research of the energy using equipment*, by H. Lempinen, Motiva, Finland, September 1994.
- Documents for the *Annex III conference "Market-Pull Activities and Co-operative Procurement of Innovative Technologies"*, Paris, France, November 29-30, 1994, prepared by Hans Westling, Promandat AB, Sweden:
 1. *Questionnaire*, (February 1994)
 2. *Summary of Report*, (September 1994)
 3. *Programme for Workshop*
 4. *Conference Documentation, Part 1 - Market Acceptance Process*
 5. *Conference Documentation, Part 2 - (Reports and memos ready before the Conference)*
 6. *Documentation from Workshops on - Copiers - Wet Appliances – Lighting*
 7. *Conference Documentation, Part 3 - Additional Documentation from Conference*.
- *Developing Markets for Energy-Efficient Copiers*, draft report by Jeffrey Harris, LBNL; Bernard Aebischer, ETH; Jim Clark, Energy Efficient Programs Div, Resources Canada; Cyane Dandridge, EPA; Olof Molinder, NUTEK; Bruce Nordman, LBNL, November 1994.
- *Comments on the experience of initiating a technology procurement programme in Finland*, by Heikki Härkönen, Motiva, Finland, November 1994.

- *Wet Appliances (Track II of the Workshop)*, summary by René Kemna, Van Holsteijn en Kemna, Netherlands, December 3, 1994.
- *The Electroheat, Motor of the Industrial Progress*, paper by Julio Peña, ADAE, Spain, for the World Energy Council, 15th Congress, Madrid, September 1992. (Presented for Annex III 1994)
- *European Commission Efforts to Promote More Efficient Use of Electricity: The PACE Programme*, by Paulo Bertoldi. From *Energy in Europe*, 23/1994. (Presented for Annex III 1994)

1995

- *Workshop Summary: Technical Opportunities and Market Development for Energy-Efficient Copiers*, by Jeffrey Harris, LBNL, United States, February 1995.
- *Electricity demand for domestic appliances in the rest state. Reducing standby power demand*. Proposal for an international project, by Olof Molinder, NUTEK, Sweden, February 1995.
- *Request for a proposal to the IEA DSM III agreement regarding planning for technology procurement of a light source*, by Egil Öfverholm, NUTEK, Sweden, February 1995.
- *Preparing for Pilot-Projects - Product Group: Wet Appliances*, memo by René Kemna, Van Holsteijn en Kemna, The Netherlands, May, 1995. (Further reference to a number of GEA reports.)
- *Energy Efficient Entertainment Electronics for International Hotels*, Project overview by Olof Molinder, NUTEK, Sweden, May 1995.
- *Cold & Hot Drinks Automatic Vending Machines - Preliminary Project on Improved Energy Efficiency*, report by Preben Munter, SEAS/Danish Energy Agency, Denmark, May 1995.
- *Notes from meetings at the Commission of the European Union 22-23 May 1995*, drawn up by Hans Westling, Promandat AB, Sweden, June 1995.
- *European Union Energy Efficiency Policy*, presentation by Paolo Bertoldi, DG XVII European Commission, at the Right Light Three Conference, Newcastle, June 1995.
- *Technical Specification for an Improved Efficiency General Lighting Service Lamp*. Final Report by Francis Rubinstein, LBNL. United States, October 1995.
- *Co-operative Procurement for Innovative Energy-Efficient Solutions*, paper by Hans Westling, Promandat AB, Sweden, for the Workshop before the ExCo Meeting in Fukuoka, Japan, October 1995.
- *Procurement of Copiers: Progress Report* by Bernard Aebischer, ETH, Switzerland, November 1995.

- *Progress Report. IEA-DSM Annex III Technology Procurement. Planning and Budget Scenarios. Working Group Wet Appliances*, by René Kemna, Van Holsteijn en Kemna, The Netherlands, November 1995.

1996

- *Co-operative Procurement. Market Acceptance for Innovative Energy-Efficient Technologies*. Report B 1996:3 NUTEK/IEA by Hans Westling, Promandat AB, Sweden. January 1996.
- *IEA DSM Agreement, Annex III Co-operative Procurement of Copiers*, by Bernard Aebischer, ETH, Switzerland, January 1996.
- *Energy Efficient Entertainment Electronics for International Hotels. A Way to Save Money and the Environment through International Procurement Program*, project outline by Olof Molinder, NUTEK, Sweden, January 1996.
- *Feasibility of Zero Energy Standby Mode (ZESM) for Electrophotographic Engines with copy speed in the range of 20 to 40 copies per minute or higher*. Report drawn up by Peter Jeanmaire, consultant, Switzerland, February 1996.
- *Technological Areas – Overview* (continuously updated) by Hans Westling, Promandat AB, Sweden, February 1996.
- *The Challenge - Annex III Information Brochure*, including inserts *Market Acceptance Process, Consumer Electronics, Lighting, Wet Appliances and Copiers*, February-June 1996. Hans Westling, Promandat AB, Sweden
- *Energy Consumption and User Behaviour Patterns for Copiers (Minolta EP 5400, Ricoh FT 3212)*. Report drawn up Arvid Levinsson and Anna Nicander, Dalarna University, for NUTEK, Sweden, March 1996.
- *Co-operative Procurement. A Tool for Accelerating Innovation*, paper by Hans Westling, Promandat AB, Sweden, for the Special Session of the ExCo Meeting in Paris, France, March 1996.
- *Methodology for the efficient technologies selection from a market point of view. Lighting and wet line cases*, presentation by Carmen Dávila, REE, Spain, for the Annex III Special Workshop in Madrid, March 1996.
- *Specification of Requirements for High Efficiency Induction Motors, Draft 2*. Report by Juha Pyrhönen, Jorma Haataja, Kari Luostarinen and Heikki Härkönen, for MOTIVA, Finland, April 1996.
- *Feasibility of Zero Energy Standby Mode (ZESM) for Electrophotographic Engines with copy speed in the range of 20 to 40 copies per minute or higher. Report 2: Extended Patent Search and Preparation of Discussions with Manufacturers*, drawn up by Peter Jeanmaire, consultant, Switzerland, May 1996.

- *Technology Procurement. Pilot Projects. Wet Appliances. An Invitation.* Brochure by René Kemna, Van Holsteijn en Kemna, The Netherlands, June 1996.
- *More efficient than incandescents, less efficient than CFLs - Why look for an improved efficiency General Lighting Service (GLS) lamp?*, summary by Nils Borg, Borg & Co, Sweden, June 1996.
- *Procurement of a replacement incandescent lamp: Progress Report to June 1996*, by Paul Davidson, BRE, United Kingdom, June 1996.
- *Cold and hot drinks automatic vending machines - continuation of project.* Description of project by Kenn Skau Petersen, Danish Energy Agency, Denmark, June 1996.
- *LED Traffic Signals*, background memo by Kalle Hashmi, NUTEK, Sweden, June 1996.
- *Department of Energy Efficiency - NUTEK: Energy-efficient lamps*, report drawn up by Johan Arndt and Mia Hårsman, Sweden, August 1996.
- *Co-operative Procurement of Innovative Copiers.* Summary report. Bernard Aebischer, ETH, Switzerland. September 1996.
- *Co-operative Procurement*, paper by Hans Westling, Promandat AB, Sweden, for the US GSA TEEM'96 Conference, Monterey, USA, September 1996.
- *Co-operative Procurement for Innovation and Energy Efficiency*, paper by Hans Westling, Promandat AB, Sweden, for the Energy Management: Opportunities in Changing Energy Markets conference in Sydney, Australia, October 1996.
- *Cold and Hot Drinks Automatic Vending Machines - Continual Project on Improved Energy Efficiency.* Report. Preben Munter, SEAS/Danish Energy Agency, Denmark. December 1996.

1997

- *Call for Competition Entries. IEA-DSM Drier Promotion Competition*, issued by The Netherlands Agency for Energy and the Environment, NOVEM on behalf of IEA-DSM Annex III. Dated Köln, Germany, 19 February 1997.
- *The Challenge.* Annex III Information Brochure and Inserts, updates. March 1997.
- *Replacement Incandescent Lamp - An International Energy Agency Technology Procurement Competition.* Issued by BRE (United Kingdom), NUTEK (Sweden), Motiva (Finland), NOVEM (The Netherlands) on behalf of the International Energy Agency (IEA), March 24, 1997. Date of issue: April 16, 1997. Including:
 1. *Competition Documentation*, April 16, 1997
 2. *Technical Background Report: Technical Specifications for an Improved Efficiency General Lighting Service Lamp*, Francis Rubinstein, LBNL USA, January 22, 1997
 3. *Energy Efficient Bulbs. A Swedish Market Study.* Johan Arndt & Mia Hårsman, Stockholm 1996-08-04.

- *Technology Procurement. An Innovation Tool for More Efficient Construction Solutions*, paper by Hans Westling, Promandat AB, Sweden, for the CIB W92's 1997 Symposium "Procurement – A Key to Innovation", Montreal, Canada, May 1997.
- *Competition Entries: IEA Hi-Motors Competition*, issued by Motiva on behalf of IEA DSM Annex III (Finland June 1997). Including *Technical Specifications and Data Required*. Date of issue: June 24, 1997.
- *Procurement of Innovative Copiers – Progress Report Summer 19997*, by Bernard Aebischer, ETH, Switzerland, August 1997.
- *Buyer Co-operation for More Efficient Solutions*, paper by Hans Westling, Promandat AB, Sweden, for the DA/DSM DistribuTECH Europe 97 conference in Amsterdam, The Netherlands, October 1997.
- *Korea Energy Management Corporation, KEMCO*, information leaflet, October 1997.
- *Presentations of Annex III on the Internet* (www.stem.se/IEAprocure/), continuously updated, including:
 1. Annex III Co-operative Technology Procurement
 2. Co-operative Procurement. Market Acceptance for Innovative Energy-Efficient Technologies
 3. The Challenge and The Market Acceptance Process
 4. Replacement Incandescent Lamp
 5. Wet Appliances and Drier Promotion Competition
 6. Efficient Copiers
 7. High Efficient Induction Motors
- *Presentation on the Internet* (<http://www.epa.gov/appdstar/esoe/techpro.html>) of the *Copiers of the Future* procurement.
- *Presentation on the Internet* (<http://info.lut.fi/ente/sahko/Hi-Motors/Intro.htm>) of the *IEA Hi-Motors Competition*.

1998

- *Report of the Jury - IEA-DSM Drier Promotion Competition 1997/1998*, issued by The Netherlands Agency for Energy and the Environment NOVEM, April 1998.
- *Drier Award Ceremony - Press Conference Material*, NOVEM, The Netherlands, April 1998.
- *Improving Three-Phase Induction Motor Efficiency in Europe - The Challenge for Manufacturers*, article in the "Power Engineering Journal" by J. Haataja and J. Pyrhönen, Finland, April 1998.
- *IEA Hi-Motors Competition - Project Report Summary*, Heikki Härkönen, Motiva, Finland, May 1998.

- *Internationally Coordinated Procurement of Innovative Copiers. Project Management October 1995-September 1997*, Bernard Aebischer, ETH, Switzerland, May 1998.
- *Technology Procurement Preparations for Collaborative Buying Actions for Energy Efficient Equipment*, final report to the European Commission, DG XVII, by Hans Westling, May 1998.
- *Collaborative Performance-Based Purchasing For Sustainable Innovation*, paper by Hans Westling, Promandat AB, Sweden, for the CIB World Building Congress 1998, Gävle, Sweden, June 1998.
- *Copier of the Future Technology Procurement Project - Competition Documentation (draft)*, Alison ten Cate, EPA, United States, June 1998.
- *Stockholm LED Traffic Signal Procurement Project*, draft background report, Nils Borg, Borg & Co, Sweden, June 1998.
- *Collaborative Performance-Based Purchasing for Sustainable Innovation*, paper by Hans Westling, Promandat AB, Sweden, for the CIB World Building Congress in Gävle, Sweden, June 1998.
- *Annex III LED Traffic Light Proposal*, background report by Nils Borg, Borg & Co, Sweden, August 1998.
- *Technology Procurement as a Market Transformation Tool*, paper by Alison ten Cate, EPA, USA, Jeff Harris, LBNL, USA, John Shugars, consultant to LBNL, USA, and Hans Westling, Promandat AB, Sweden, for the 1998 ACEEE Summer Study, Asilomar, USA, August 1998.
- *Copier of the Future Technology Procurement Project - Competition Documentation*, by Alison ten Cate, EPA, United States. First published September 1998, last revision November 1998.
- *Buyer Collaboratives and Performance Criteria for Greener Buildings*, paper by Hans Westling, Promandat AB, Sweden, for the Green Building Challenge '98 Conference, Vancouver, B.C., Canada, October 1998.
- *IEA Hi-Motors Competition - Jury Report*, issued by Motiva, Finland, December 1998.

1999

- *Proceedings from the Annex III Workshop 'Accelerate Innovation and Market Transformation of Energy-Efficient Products*, London, United Kingdom, 24-25 February 1999. Compiled by Hans Westling, Promandat AB, Sweden, July 1999.

Examples of presentations and reports prepared for the Annex III Workshop and included in the Workshop Proceedings:

1. *Overview of Annex III Work - Procurement Process, Pilot Projects and Self-Evaluations*, report by Hans Westling, Promandat AB, Sweden.
 2. *IEA DSM Annex III Co-operative Procurement - Case studies*, short presentations by Hans Westling and the Project Managers.
 3. *Lighting Energy Efficiency Partnership, LEEP - Case Study*, short presentation by Keven Verdun, The Lighting Association, United Kingdom.
 4. *Annex III Technology Procurement - Copier Pilot Project: Evaluation Case Study*, presentation by Alison ten Cate, EPA, United States.
 5. *IEA-DSM Annex III - Co-operative Procurement: Project Update - Future Bulb*, by Paul Davidson, BRE, United Kingdom..
 6. *U.S. Energy-Efficiency Technology Procurement Projects: Evaluation and Lessons Learned*, report by Marc Ledbetter, PNNL, United States.
 7. *Evaluation of Annex III on Cooperative Procurement of The International Energy Agency's Demand Side Management Agreement*, report by Peter Lund, Solpros, Finland.
 8. *The European Union Policies and Programmes for Market Transformation of End-use Equipment*, presentation by Paolo Bertoldi, DG XVII, European Commission.
- *Kemco 1998 Annual Report*, (Korea Energy Management Corporation), February 1999.
 - *Regulation for the promotion of the dissemination of energy-saving office equipment/appliances*, presentation by Kwang-Hong Shin, KEMCO, Korea, April 1999.
 - *High efficiency energy equipment/appliance certification system*, presentation by Kwang-Hong Shin, KEMCO, Korea, April 1999.
 - *Technology Procurement for Efficient Systems*, paper by Hans Westling, Promandat AB, Sweden, for the CIB 99 Joint Triennial Symposium "Customer satisfaction: A focus for research & practice", Cape Town, South Africa, September 1999.
 - *Documentation for the Copier of the Future Award Presentation*, prepared by Rachel Schmeltz, EPA, United States, November 1999.
 - *Documentation before and after the LED Traffic Signals Workshop*, prepared by Nils Borg, Borg & Co, Sweden, September and December 1999.
 - *IEA Hi-Motors Competition. Notes presented at the IEA DSM Annex III Experts Meeting in Stockholm on 1 December 1999*, by Heikki Härkönen, Motiva, Finland. December 1999.

In addition to the documents presented above, extensive pre-meeting documentation and minutes have been compiled by Hans Westling, Promandat AB, Sweden, for every Annex III Experts Meeting during the years.

ANNEX III – COST-SHARING CONTRIBUTIONS AND SPENDING 1994 - 1999

Amounts in USD 1,000 (VAT not included)	1994	1995	1996	1997	1998	1999	
	Outcome	Outcome	Outcome	Outcome	Outcome	Budget	Outcome
TOTAL CONTRIBUTIONS¹⁾	105	121	121	131	140	140	130 ²⁾
COSTS							
1. Operating Agent: Time paid in full by NUTEK/STEM, Sweden.	0	0	0	0	0	0	0
2. Documentation, typing, printing, copying, distribution for Experts meetings ³⁾	30	41	40	45	45	45	45
3. Travel expenses	15	15	17	14	17	20	19
4. Paris Conference 1994	48 ⁴⁾	-	-	-	-	-	-
5. Funds reserved for specialists	12	-	-	-	-	-	-
6. Experts' reports for functional requirements for technological areas, Phase I	-	20	-	-	-	-	-
7. Common costs for specification for technologies and technical evaluation	-	11	48	38	35	20	-
8. Consultation of legal expert (tendering process)	-	9	6	5	10	-	-
9. Some general common costs for tendering documentation & information	-	24	6	22	10	10	5 ⁵⁾
10. London Workshop 1999 on lessons learned incl. Documentation	-	-	-	-	20 ⁶⁾	45	61 ⁷⁾
Total cost-sharing costs	105	120	117	124	137	140	140
TOTAL COST-SHARING COSTS 1994 – 1999							883

1) Fluctuations in exchange rates between currencies.

2) European Commission contributed to the Workshop instead.

3) Additional contributions from NUTEK/STEM to varying extent over the years.

4) Additional contributions were also received from NOVEM, DOE, CEE and NUTEK.

5) 5' set aside for Award ceremonies.

6) Includes 20' set aside as planned for 1999 Workshop on Lessons Learned.

7) Additional contributions see Appendix 5:2.

ANNEX III - DETAILED COST-SHARING CONTRIBUTIONS

Amounts in USD 1,000	1998	1999
	Decided by ExCo March 1997, 1 year	Decided by ExCo March 1998, 1 year
Denmark	6,913	6,913
EC	10,000 ¹⁾	10,000 ²⁾
Finland	7,021	7,021
Korea	10,381	10,381
Netherlands	8,923	8,923
Spain	11,404	11,404
Sweden	8,077	8,144
UK	21,000	21,000
USA	57,633	57,633
World Bank	0 ³⁾	0 ³⁾
Total	141,352 approx. 141'	141,449⁴⁾ approx 141'

- 1) Total: 20,000 ECU incl. VAT through a contract with the Operating Agent
 - 12,000 ECU, approx. 13,300 US\$ received 1997
 - 8,000 ECU, approx. 9,000 US\$ received 1998
- 2) EC has contributed ECU 14,750, approx. 16,000 US\$, to the Annex III Workshop on Lessons Learned in a contract with the Building Research Establishment (BRE), UK.
- 3) Funding only possible through task-sharing within already decided projects/programmes with specific countries.
- 4) For the Annex III Workshop on Lessons Learned additional financing has been identified see below:

Additional Contributions for Workshop on Lessons Learned

	<u>ECU</u>	<u>USD</u>
- United Kingdom ⁵⁾	7,500	8,500
- United States	6,750	7,500
- Finland	2,250	2,500
- Sweden	9,000	10,000
- The Netherlands	6,000	7,000
- European Commission	<u>14,750</u>	<u>16,200</u>
Total funding	46,250	51,700

- 5) Further contribution by United Kingdom with time for some persons.

ANNEX III – LONDON 1999 WORKSHOP ON LESSONS LEARNED

	In 1,000 units		
¹⁾	SEK	USD	EURO
FUNDING			
From cost-sharing 1998		20	
From cost-sharing 1999		45	
Extra contributions ²⁾		52	
Total		117	109
COSTS			
For UK expenses in London through BRE		64	59
Operating Agent ³⁾ for preparations and Documentation	138	16	
External Evaluation	256	30	
Report on US cases		7	
Total		117	

¹⁾ There have been fluctuations in the exchange rates between the currencies during 1998 and 1999.

²⁾ United Kingdom has also contributed EURO 13,545 in staff time.

³⁾ Operating Agent's time paid in full by STEM, Sweden.

ANNEX III – PARTICIPATING EXPERTS, PROJECT MANAGERS AND SPECIALISTS

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ANNEX III – LIST OF MEETINGS

Year	DSM Executive Committee Meetings	Annex III Experts Meetings	Annex III Workshops / Seminars	Annex III Meetings, Seminars with manufacturers and industry and Award Ceremonies
1993	Stockholm, Sweden, 1-2 April Kerkrade, Netherlands, 28-29 October	Copenhagen, Denmark, 18-19 November		
1994	Madrid, Spain, 24-25 March Washington D.C., USA, 13-14 October	Delft, Netherlands, 3-4 March Washington, D.C., USA, 15-17 May ²⁾ Helsinki, Finland, 29-30 September ²⁾ Paris, France, 1 Dec.	Initial Workshop "Market-Pull Activities and Cooperative Procurement of Innovative Technologies", Paris, France, 29-30 November	Informal seminar at the ACEEE Summer Study, Asilomar, USA, in August
1995	Schaffhausen, Switzerland, 23-24 March Fukuoka, Japan, 19-20 October ¹⁾	Zurich, Switzerland, 1-3 March ²⁾ Valbonne, France, 12-13 June ²⁾ Washington D.C., USA, 14-16 Nov. ²⁾		Informal seminar at the ECEEE Summer Study in Mandelieu, France, 8 June
1996	Paris, France, 21-22 March Sydney, Australia, 31 Oct. – 1 Nov. ¹⁾	Madrid, Spain, 11-13 March ²⁾ Stockholm, Sweden, 24-26 June Oxford, United Kingdom, 9-10 Dec. ²⁾	Seminar "Future-oriented buying for innovative, more efficient products and systems", at The World Bank, Washington D.C, USA, 6 September	Meetings about the coming competitions: - In <i>lighting</i> , Hanover Fair, 23 April. - In <i>copiers</i> , Stockholm, 11 September. - In <i>motors</i> , Lisbon, October. Seminar at ACEEE Summer Study, Asilomar, USA, Aug. Informal meeting at the TEEM'96, Monterey, USA, Sept.

¹⁾ Presentation about Annex III at special meeting in conjunction with Executive Committee Meeting

²⁾ Workshop/Seminar with national specialists held in connection with Experts Meeting

Year	DSM Executive Committee Meetings	Annex III Experts Meetings	Annex III Workshops / Seminars	Annex III Meetings with manufacturers and industry & Competition Award Ceremonies
1997	<p>Helsinki, Finland, 10-11 April</p> <p>Oslo, Norway, 10-13 September</p>	<p>Copenhagen, Denmark, 5-7 March</p> <p>Espoo, Finland, 22-24 September</p>		<p>Meeting and launching of the <i>Drier Competition</i>, at the Domotechnica Fair, Cologne, 19 Febr.</p> <p>Meeting and launching of the <i>Lighting Competition</i>, at the Hanover Fair, 16 Apr.</p> <p>Informal seminar at the ECEEE, Czech Republic, June.</p> <p>Presentation of the <i>Hi-Motors competition</i> at international motor conference in United Kingdom, September.</p> <p>EC seminar about <i>Consumer Electronics</i> Florence, November</p> <p>Manufacturer meeting about the coming <i>copier competition</i>, Washington D.C., 2 December</p>
1998	<p>Seoul, Korea, 25-27 March</p> <p>Chester, United Kingdom, 7-9 October</p>	<p>Utrecht, Netherlands, 19-20 February</p> <p>Washington D.C., USA, 24-26 June ³⁾</p> <p>Amsterdam, Netherlands, 22 September</p> <p>Vienna, Austria, November 18-20</p>		<p>"IEA DSM Award of Excellence" ceremony in the <i>Drier Competition</i>, Hague, 27 April</p> <p>Meeting and launching of the <i>Copier of the Future competition</i>, at conference "Improving Electricity Efficiency in Commercial Buildings", Netherlands, 22 September</p>

³⁾ Workshop/Seminar with national specialists held in connection with Experts Meeting

Year	DSM Executive Committee Meetings	Annex III Experts Meetings	Annex III Workshops / Seminars	Annex III Meetings with manufacturers and industry & Competition Award Ceremonies
1999	<p>Copenhagen, Denmark, 16-14 April</p> <p>Amsterdam, Netherlands, 28-29 October</p>	<p>London, United Kingdom, 25-26 Febr.</p> <p>Brussels, Belgium, 30 June-1 July</p> <p>Stockholm, Sweden, 1-2 December</p>	<p>Workshop on Lessons Learned: <i>"Accelerate Innovation and Market Transformation of Energy-Efficient Products"</i>, London, United Kingdom, 24-25 February</p>	<p>"IEA DSM Award of Excellence" ceremony in the <i>Hi-Motors Competition</i>, at the Annex III Workshop on Lessons Learned, London, 24 February.</p> <p>Informal seminar at the ECEEE Summer Study, France, June.</p> <p>"Kick-off" meeting for <i>LED Traffic Signals</i>, Stockholm, 27-28 September.</p> <p>"IEA DSM Award of Excellence" ceremony in the <i>Copier of the Future Competition</i>, at the COMDEX/Fall, Las Vegas, 16 November.</p>