SPEEDIER

SME Program for Energy Efficiency through Delivery and Implementation of EneRgy Audits

D9.7 – DRAFT CWA PROJECT PLAN

Lead Contractor: TFC Research and Innovation Limited

Author(s): Tom Flynn
Bernice Clarke

Date: 29th August 2020

This document is the SPEEDIER draft CWA project plan corresponding to D9.7 (M15) led by TFC Research and Innovations Limited (TFC) and defines the workshop project plan in line with CEN CWA development protocol.

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 847034*.*

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Project details			
Project acronym	SPEEDIER	**Start / Duration**	June 2019/ 30 Months
Topic	LC-SC3-EE-8-2018-2019 Capacity Building programmes to support implementation of energy audits	**Call identifier**	H2020-LC-SC3-EE-2018
Type of Action	CSA	**Coordinator**	Jo Southernwood (IERC)
Contact persons	Jo Southernwood jo.southernwood@ierc.ie, info@speedierproject.eu		
Website	www.speedierproject.eu		

Deliverable details			
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Work Package	9		
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Deliverable Contributors		
Deliverable leader	**Name**	Tom Flynn
	Organisation	TFC
	Role/Title	Work Package 9 Leader
	Email	t.flynn@tfcengage.com
Contributing Author(s)	**Name**	Bernice Clarke
	Organisation	TFC
	Role/Title	Work Package 9 Assistant
	Email	info@tfcengage.com
Contributing Author(s)	**Name**	Natasha McCrone
	Organisation	TFC

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	Role/Title	Work Package 9 Assistant
	Email	n.mccrone@tfcengage.com
Reviewer(s)	**Name**	Diana Romeu
	Organisation	ITEC
	Role/Title	Work Package 3 Leader
	Email	dromeu@itec.cat
Review and quality approval	**Name**	Jo Southernwood
	Organisation	IERC
	Role/Title	Senior Research Engineer
	Email	jo.southernwood@ierc.ie
Final review and submission	**Name**	Jo Southernwood
	Organisation	IERC
	Role/Title	Senior Research Engineer
	Email	jo.southernwood@ierc.ie

Document History

Date	Version	Name	Changes
06/03/20	0.1	Tom Flynn / Bernice Clarke	First draft version.
26/03/20	0.2	Tom Flynn / Bernice Clarke	Advancement of the WS project plan.
04/04/20	0.3	Diana Romeu	ITEC review and joint TFC/ITEC discussion.
06/05/20	0.4	Tom Flynn / Bernice Clarke	Further advancements to the WS project plan.
26/06/20	0.5	N. McCrone	Internal review.
31/07/20	0.6	Tom Flynn / Bernice Clarke	Updated accordingly.
14/08/20	0.7	Jo Southernwood	Review and QA'd.
20/08/20	0.8	Tom Flynn.	Updated based on review and QA.
29/08/20	1.0	Jo Southernwood	Approved release.

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Executive Summary

SPEEDIER is a highly innovative *one-stop-shop solution* that aims to apply an integrated approach to energy management, providing information, advice, capacity building, energy assessment, financing, as well as implementation of energy efficiency solutions and monitoring of impacts. SPEEDIER aims to deliver a self-financing, outsourced energy management service with much benefit to SMEs, enabling them to implement energy conservation measures (ECMs) and also access the energy services market. The SPEEDIER Service will be available via energy consultants, auditors and experts (SPEEDIER Experts) and will facilitate the uptake of energy audits and the subsequent implementation of energy efficiency measures in SMEs.

SPEEDIER targets groups of SMEs in 4 European pilot regions:

1) In **Spain,** we aim to test a location-based approach, engage with SMEs based at a single business park to demonstrate the advantages of clustering SMEs to give them better access to the economies of large-scale projects;
2) In **Ireland** and **Romania,** we aim to test in SMEs from the manufacturing and hospitality sectors respectively;
3) In **Italy**, we aim to apply a more general test approach, accessing SMEs from any sector via ESCOs.

This document presents the CEN Workshop agreement project plan (i.e. CWA WS project plan). It is a living document and updating it on an ongoing basis is part of the process. Section 1 is an introduction, while Section 2 addresses the SPEEDIER CWA Project Plan and is supported by the detail provided in Annex A1. The development of the SPEEDIER pre-standardisation process is managed and overseen by Tom Flynn (TFC), Work Package 9 Leader, who liaises closely with the SPEEDIER partners in the process and in particular the Project Coordinator, IERC, and the SPEEDIER Tool developer, ITEC. The undertaking follows CEN CWA development protocol proceedings and involves the appointment of a secretariat, which at the time of producing Deliverable D9.5 was not made.

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Abbreviations

CEN	European Committee for Standardisation
COVID-19	Coronavirus disease 2019 is an infectious disease caused by severe acute respiratory syndrome coronavirus 2 (SARS-CoV-2)
ECM	Energy Conservation Measure
IERC	International Energy Research Centre
ITEC	Institut de Tecnologia de la Construcció de Catalunya
H2020	EU Research and Innovation programme (2014 – 2020)
SME	Small or Medium sized Enterprise
TFC	TFC Research and Innovation Limited
WP	Work Package
WS	Workshop

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Contents

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1 Introduction

1.1 Aims

The aim of this Deliverable, (D9.7) is to define the draft CEN Workshop Agreement Project Plan (i.e. CEN CWA Project Plan) in line with CEN CWA development protocol. Annex 1 defines the draft CWA WS Project Plan. The plan, as part of protocol, is updated on an ongoing basis during the course of producing the pre-standardisation CEN Workshop Agreement.

The process is managed by Work Package (WP) 9 Leader, TFC Research and Innovation Limited, working in close collaboration with the SPEEDIER Project Coordinator, International Energy Research Centre and Institut de Tecnologia de la Construcció de Catalunya, who have developed the SPEEDIER Software Tool, which will be used by the Energy Experts engaging with the SMEs as part of the SPEEDIER Service.

1.2 Scope

This deliverable is scoped to address the CEN CWA Project Plan for SPEEDIER and is limited to this part of the CEN CWA process. A CWA Project Plan can be updated several times as part of the ongoing pre-standardisation process.

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2 Background

The SPEEDIER project is led by the experienced International Energy Research Centre (IERC), which is an integral part of the Tyndall National Institute, Cork, Ireland (www.tyndall.ie/ierc). Work Package 9 (Quality Assurance), which includes a task for the management of standards, is led by TFC Research and Innovation Limited (www.tfcengage.com).

2.1 Brief overview of the Proposed SPEEDIER Service

SPEEDIER (www.speedierproject.eu), is a highly innovative *one-stop-shop solution* that applies an integrated approach to energy management for SMEs, providing information, advice, capacity building, energy assessment, financing as well as the implementation of energy efficiency solutions and for the monitoring of implementation impacts. Project SPEEDIER, delivers a service that is self-financing for outsourced energy management with several benefits for SMEs. The Service enables the energy, cost and carbon savings associated with the implementation of Energy Conservation Measures (ECMs) to be more readily realized. The composition of the SPEEDIER Service includes the development of a software tool for use by energy experts during the energy assessment process. The tool provides a clear framework that will assist energy experts in gathering the data required to carry out a robust energy assessment and enables them to present to the SME a range of possible ECMs, classified into no-cost, low-cost, medium-cost and high-cost categories. The information gathered and entered into the SPEEDIER software tool supports the energy expert to identify the package of ECMs that are most appropriate for the SME, calculate the likely energy and cost savings and measure the actual savings post ECM implementation against the baseline. Ring-fencing of the subsequent cost savings will enable the SME to invest in further ECMs.

2.2 CWA Project Plan

The capability of related energy management tools and platforms to interconnect and communicate with the SPEEDIER software tool will further strengthen the ability of energy experts and energy managers to accurately predict and measure the impact of the proposed ECMs. This will further contribute to reducing energy consumption and the associated carbon emissions that lead to adverse climate change.

SMEs are reported to be responsible for approximately 13% of total energy demand[1] and across the EU, buildings account for 40% of wide energy consumption. Article 8 of the Energy Efficiency Directive (EU EED) requires the European Member States (EU-28) to develop instruments (i.e. Projects, Tools and Policies) that encourage SMEs to undergo energy audits and to implement their recommendations. Addressing the fulfilment of Article 8 is the cornerstone of the SPEEDIER project. It is focused on assisting Member States to realize the requirements of Article 8, initially across four target regions - Spain, Italy, Romania and Ireland.

[1] Accelerating Energy Efficiency in Small and Medium-sized Enterprises, 2015, International Energy Agency

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Interoperability has been identified as a key characteristic for the SPEEDIER software tool to support Article 8 implementation and is central to the development of the draft CEN Workshop Agreement (CWA). The SPEEDIER CWA will define the Vocabulary and Application Programming Interface (API) constructs of a common information space for the sharing of knowledge at semantic level. The newly created capability will enable other related software tools and platforms to engage with the SPEEDIER tool, strengthening the take-up of the SPEEDIER Service, benefiting European based SMEs and the furthering of efforts to combat irreversible man-made climate change.

The sponsor of the draft CWA is the International Energy Research Centre (IERC), Cork, Ireland (http://www.ierc.ie/). Given CEN/CENELEC approval of the WS Project Plan, and should the project continue on this pre-standardisation route, the undertaking will be driven by TFC Research and Innovation Limited in conjunction with the IERC and the ITEC. It is expected that the development of the draft CWA will be completed by Q4, 2021.

The SPEEDIER CEN Project Plan is defined in Annex A1.

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3 Conclusions

This Deliverable, D9.7, presents the draft CEN CWA Project Plan for SPEEDIER, which is due to the European Commission at Month 15 of the project. Details of the WS Project Plan are contained in the Annex of this document. The SPEEDIER CWA WS Project Plan is a living document and periodically updating it at key milestones is part of the normal proceedings. A CWA Project Plan defines the means for the delivery of the CEN Workshop Agreement document. Delivery of the SPEEDIER CWA follows CEN protocol proceedings in line with CEN/CENELEC Guide 29. A CEN CWA is a pre-standardisation mechanism. Other means of delivery exist. We may explore alternative pre-standardisation options depending on the feedback for the issued secretariat tender.

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ANNEX

A1 – CEN CWA WS Project Plan

The following pages specified the CEN CWA WS Project Plan.

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DRAFT

Project Plan for the CEN or CENELEC Workshop on

SME ENERGY EFFICIENCY SPEEDIER SERVICE – INTEROPERABLE COMPONENT DEFINITION – SS-API

Workshop

The content of the Project Plan is structured into chapters. These chapters represent the Project Plan's minimum content and will evolve. There is no restriction on the addition of further chapters if this is deemed useful.

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1. Status of the Project Plan

Initial draft Project Plan, to be further developed, prior to submission for approval.

2. Background to the Workshop

Market Environment

Small-to-medium-sized enterprises (SMEs) remain a cornerstone of individual European economies. They account for 99.98% of European enterprises.[2] SMEs are businesses whose personnel numbers fall below certain limits (Table 1). The abbreviation "SME" is used by international organisations such as the World Bank as well as the European Union, the United Nations and the World Trade Organization (WTO). Globally and economically, they are very important for society, employment, trade investment and the environment. In the past, SMEs have not been given sufficient attention with regards to energy efficiency at European level. Today, they are more prevalent in this important societal and economic area. The magnitude of its importance has increased given today's pandemic. The SME contribution to tackle climate change will be an even great focal point for a sustainable world once the pandemic virus has been eradicated.

Article 8 of the Energy Efficiency Directive (EU EED) requires European Member States to develop programmes (i.e. Projects, Tools and Policies) that encourage SMEs to undergo energy audits and to subsequently implement their recommendations. Article 8 has now been transposed into national legislation in all EU Member States and today SMEs are encouraged to comply with the energy audit obligation. SMEs are reported to be responsible for approximately 13% of total energy demand[3] and across the EU, buildings account for 40% of wide energy consumption. Addressing the fulfilment of Article 8 is the cornerstone of the SPEEDIER project. It is focused on assisting Member States to realize the requirements of Article 8, initially across four target regions - Spain, Italy, Romania and Ireland.

In Europe, as defined by the European Commission, SME's are the enterprises that meet the following definition of staff headcount and either the turnover or balance sheet total definitions:

Table 1 - SME Categories

Company category	Staff headcount	Turnover	Balance sheet total
Medium-sized	< 250	≤ €50 million	≤ €43 million
Small	< 50	≤ €10 million	≤ €10 million
Micro	< 10	≤ €2 million	≤ €2 million

[2] Muller, P, et al; 2017; Annual Report on European SMEs 2016/2017, Focus on self-employment; European Commission

[3] Accelerating Energy Efficiency in Small and Medium-sized Enterprises, 2015, International Energy Agency

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Legal environment (Directives and relevant national legislation)

According to the International Energy Agency, energy efficiency is seen as a "first fuel".[4] It is recognized as a cost-effective way to concurrently improve the security of supply, as well as to enhance competitiveness and to contribute to the overall energy and climate goals[5],[6]. Meeting these goals necessitates an efficient and effective transposition of European energy policies[7] in the Member States (MS). Both energy audits, assessment and energy management systems have been identified as a helpful means to improve energy efficiency in companies [8] [9] [10] [11] [12]. In recognition of their benefits, the European Commission (EC) politically set about endorsing the implementation of energy audits since 2006 by requiring its Member States (MS) to implement "high quality energy audit schemes" according to the European Energy Service Directive (ESD, 2006/32/EC) (Art. 12 (1) ESD; EC 2006). Due to the poor response and lack of impressive progression towards meeting the 2020 energy efficiency targets, the EC decided to establish the Energy Efficiency Directive (EED, 2012/27/EU), which entered into force on the 4th December 2012 (EC 2012a). With this directive, the EC enforced the implementation among others by requiring all Member States to oblige large companies to regularly conduct mandatory energy audits unless they implement an energy management system (Art. 8 (4, 6) EED). However, at the EU summit in October 2014, EU countries agreed on a new energy efficiency target of 27% or greater by 2030. Yet in 2017, global energy demand rose by 1.9% – the fastest annual increase since 2010. The forces driving up energy demand, led by strong economic growth had outpaced progress on energy efficiency. As a result, energy intensity – primary energy use per unit of GDP – fell by just 1.7% in 2017, the slowest rate of improvement this decade, which is a concern as evidently carbon emissions globally are having an immense negative impact. The European Union (EU) aims to achieve an energy efficiency target of 32.5% by 2030. The Energy Efficiency Directive (EED, 2012) and the Energy Performance of Buildings Directive (EPBD, 2010) are the main EU pieces of legislation for reaching these goals.

[4] IEA, 2019 https://www.iea.org/commentaries/energy-efficiency-is-the-first-fuel-and-demand-for-it-needs-to-grow
[5] EC (European Commission), 2010. (ed.): Communication From the Commission to the European Parliament, The Council, The European Economic and Social Committee and the Committee of the Regions. Energy 2020 – A strategy for competitive, sustainable and secure energy. SEC (2010) 1326. COM (2010) 639 final.
[6] EC (European Commission), 2014. (ed.): Communication From the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions. A policy framework for climate and energy in the period from 2020 to 2030.
[7] https://www.sciencedirect.com/topics/engineering/european-energy-policy
[8] Scheich, 2014, Do energy audits help reduce barriers to energy efficiency? An empirical analysis for Germany Int. J. Energy Technol. Policy, 2, pp. 226-239
[9] T. Fleiter, J. Schleich, P. Ravivanpong, 2012, Adoption of energy-efficiency measures in SMEs—An empirical analysis based on energy audit data from Germany,
[10] K. Wohlfahrt, W. Eichhammer, B. Schlomann, U. Mielicke, 2017, Learning networks as an enabler for informed decisions to target energy-efficiency potentials in companies J. Clen. Prod., 163 (2017), pp. 118-127.
[11] M. Schulze, H. Nehler, M. Ottosson, P. ThollanderE, 2016, Energy management in industry e a systematic review of previous findings and an integrative conceptual framework
J. Clean. Prod., 112 (2016), pp. 3692-3708
[12] A. Kluczek, P. Olszewski, 2017, Energy audits in industrial processes J. Clean. Prod., 142 (4) (2017), pp. 3437-3453

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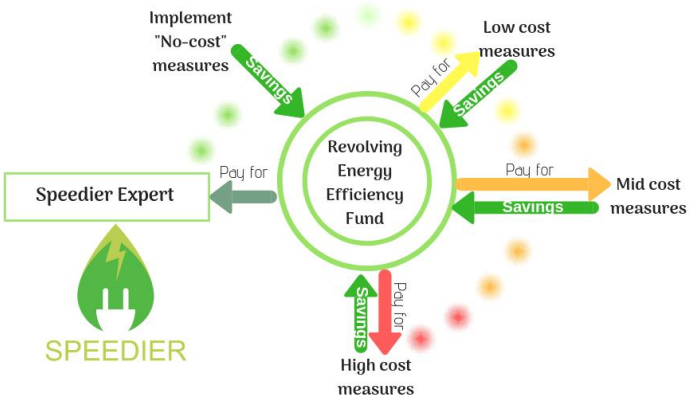

Figure 0-1: SPEEDIER Service self-financing mechanism

Today, Article 8 now requires Member States to set up national incentives to assist SMEs to undertake energy audits. Clearly, SMEs have enormous potential to save energy and contribute towards the ability of the EU 28 to achieve their collective targets under the EED of a 32.5% improvement in energy efficiency by 2030. To date, little of this potential has been realised with studies estimating that only 25% of SMEs in Europe have undertaken an energy audit[13] and a range of studies citing barriers that include lack of time, resource, in-house expertise, finance and the low priority nature of energy efficiency compared to other business needs[2, 14]. Article 8 also requires large enterprises to undertake energy audits every 4 years, yet a recent study suggests that only 11% of large enterprises undertaking an audit intend to implement any of its recommendations[15]. Interesting is the fact that 2 in 5 businesses cite the lack of funding or finance as a reason for this inaction.[16] It is against this background that the challenges for the #H2020 SPEEDIER project are set (https://speedierproject.eu/). Through surveys and focus groups conducted by the SPEEDIER project consortium it was found that SMEs from each participating pilot country would consider outsourcing energy management to an external energy consultant who would propose and assist with the implementation of a range of ECMs as they lack the in-house resource (in terms of knowledge, time and finance) to do so themselves. They also agreed that having an external energy manager to create awareness on energy efficiency would be effective in enhancing energy culture among employees. This shows that there is a great need across the pilot regions for a service like SPEEDIER that can assist and guide SMEs through the capacity building of employees and implementation of complex ECMs, (i.e. more than just upgrading lighting systems), for example, those relating to optimization of heating and cooling equipment, variable speed drives, upgrades to more efficient technologies and building fabric upgrades. Addressing interoperability engagement to enable different platforms and tools to communicate at technology sematic level will also strengthen energy efficiency uptake in the quest to overcome these challenges. This covers an integral area of the SPEEDIER Service at European level that strengthens interest both from a sustainability, engagement and operational perspective of the SPEEDIER tool and Service take up. In 2017, the European Commission issued its' Directive [COM (2017) 134] for the European Interoperability Framework – Implementation Strategy. This has a significant impact basis for European climatic warming resilience, industry and for the future of energy management services.

[13] CHANGE Project report; *Energy Efficiency in SMEs: Success Factors and Obstacles*, 2010, EUROCHAMBRES
[14] Fresner, J, et al, 2016, *Energy efficiency in small and medium enterprises: Lessons learned from 280 energy audits across Europe*, Journal of Cleaner Production
[15] SGS; *Bridging the gap to further energy savings;* 21st March 2016; https://www.sgs.co.uk/en-gb/news/2016/03/sgs-bridging-the-gap-to-further-energy-savings
[16] UK Department for Business, Energy & Industrial Strategy; *Evaluation of the Energy Savings Opportunity Scheme;* October 2017; Crown copyright

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Motivation for the creation of this Workshop

The European Commission H2020 project, SPEEDIER, is a highly innovative *one-stop-shop solution* that applies an integrated approach to energy management for SMEs, providing information, advice, capacity building, energy assessment, financing as well as the implementation of energy efficiency solutions and for the monitoring of implementation impacts. Project SPEEDIER, delivers a service that is self-financing for outsourced energy management with several benefits for SMEs. The Service enables the energy, cost and carbon savings associated with the implementation of Energy Conservation Measures (ECMs) to be more readily realized. The composition of the SPEEDIER Service includes the development of a software tool for use by energy experts during the energy assessment process. The tool provides a clear framework that will assist energy experts to gathering the data required to carry out a robust energy assessment and enables them to present to the SME a range of possible ECMs, classified into no-cost, low-cost, medium-cost and high-cost categories. The information gathered and entered into the SPEEDIER software tool supports the energy expert to identify the package of ECMs that are most appropriate for the SME, calculate the likely energy and cost savings and measure the actual savings post ECM implementation against the baseline. A financial ring-fencing service will subsequently be applied. Furthermore, the ability for other energy management tools and platforms to be able to communication with the SPEEDIER software tool strengthens the ability of energy experts as well as energy efficiency manager to deliver greater ECM impact and results for SMEs by avoiding the need to enter the same data into different tools. Interoperability is a key ingredient for the demonstration of European leadership and this is a characteristic of the SPEEDIER software tool supporting Article 8 implementation. It is central to the development of the draft CEN Workshop Agreement (CWA). The SPEEDIER CWA will define the Vocabulary and Application Programming Interface (API) constructs of a common information space for the sharing of knowledge at semantic level. The newly created capability will enable other related software tools and platforms to engage with the SPEEDIER tool, strengthening the take-up of the SPEEDIER Service, benefiting European based SMEs. This undertaking strengthens European efforts to combat irreversible man-made climate change. The inclusion of a pre-standardisation document in support of the SPEEDIER Service and SPEEDIER tool for Experts thus strengthens the integrity of the SPEEDIER energy assessment, advice and financial ring-fencing approach. It will also support the quality of the SPEEDIER Service training provision.

3. Workshop proposers and Workshop participants

- Consortium member of the Horizon 2020 project SPEEDIER.
- Other invited interested parties to the kick off meeting.
- CEN/CENELEC national member holding the post as the workshop secretariat.
- Registered participants who will have approved the current Project Plan and will be listed in the Annex.

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4. Workshop scope and objectives

The workshop will deliver one Workshop Agreement centred on interoperability for data engagement and communication with the SPEEDIER Service software tool. It will define:

1. Resource Description – Vocabularies to describe the different types of resources to enable the different related energy management platforms, tools or ecosystem to technically exchange resources.

2. SPEEDIER Services Tool – Agree on a minimal set of APIs (Application Programming Interface) to be implemented by any platform / software tool operating in the energy management domain, through which requests for services can be made.

3. Security & Accessibility Profile for Resources and Services – Set of security specifications to be associated with resources and services maintained on the SPEEDIER software tool.

The CWA defines the data formats, data relationships and related tables, the data relationships and related tables to connect with the SPEEDIER software tool and its content for wider use.

5. Workshop programme

The working language will be English. The CWA will be published in English.

Assuming that the CWA will be elaborated upon and the work can be synchronized with Horizon 2020 project SPEEDIER, it is proposed to complete the first CWA within a period of 18 months, in line with the duration of the project.

Work plan

Tentative workshop schedule, based on the following outline, will be drawn up after a secretariat is appointed:

Date:	Place:	Meeting:	Activity of item	Responsibility
TBD	TBS/or Virtual	Kick off meeting	1. Appointment of Chair and Secretariat 2. Approval of Business Plan Including: - Introduction and rationale on interoperable data sets.	Workshop participants

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			- Presentation of attendees and area of expertise; - Session on current obstacles and definition of data brokerage; - Expected needs and requirements from data brokers (what brokers will do); - how to standardize brokers 3. Approval of the Work Programme.	
TBD			Delivery of pre-draft CWA to Secretariat for editing to meet CEN Drafting rules.	Chairperson, Workshop participants
TBD			Delivery of the First CWA draft.	Chairperson, Workshop participants.
TBD	Virtual		Review and comments - Online discussion and delivery of revised 2nd draft CWA.	Workshop participants.
TBD	Virtual	2nd meeting	First discussion of the draft CWA.	Workshop participants.
TBD	Virtual	3rd meeting	Second discussion of the draft CWA. - Approval of draft CWA for 60 days.	Workshop participants.
-	-	-	60-day public comment period.	-
TBD	TBS	Adoption of CWA and WS closure meeting.	Comments resolution meeting Approval of the final text of the CWA.	Workshop participants.
			Submission.	

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6. Workshop structure

The responsibilities of the workshop chair include the following tasks to:

- chair workshop plenary meetings;
- ensure that the workshop delivers in line with its business plan;
- manage the process for finding an agreement;
- draft the 1st CWA (draft) and incorporating received comments and feedback to produce revision 2 documents.

A Standards body yet to be appointed will provide the workshop secretariat, subject to formal acceptance of the business plan at the kick-off meeting.

The responsibilities of the secretariat cover the co-ordination of administrative duties involved in the organization of the Workshop including, to:

- maintain the meeting schedules and arrange location for the physical meetings;
- distribute the agenda and other documents for the plenary sessions;
- prepare draft minutes of the plenary sessions;
- ensure the timely availability of the working documents for meetings; ensure that the CWA is available in time on the appropriate CEN format;
- interface with CCMC regarding strategic issues, problems arising, external relationships; etc.

The CWA content will be delivered primarily by members of the SPEEDIER project. The development project runs mainly as a gathering of experts responsible for commenting the drafts and suggesting improvements and will be carried out primarily online. All communication shall be copied to the Secretariat and all participants to ensure transparency, openness and equal treatment of all stakeholders.

7. Resource requirements

All costs related to the participation of interested parties in the Workshop's activities have to be taken by themselves. There is no fee for registered participation in the Workshop.

The SPEEDIER project will contribute to the drafting of the CWA, providing text and comments, if necessary.

SPEEDIER project will provide the Workshop Secretariat, subject to formal approval of the Project Plan at the kick-off meeting. The Secretariat costs will be covered by the SPEEDIER project.

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Participation to this workshop is open to all interested parties and physical meetings will be held in Europe. The kick-off meeting may be held virtually due to the COVID-19 pandemic. Online meetings will be encouraged as much as possible. All documentation shall be drafted and electronically distributed.

8. Related activities, liaisons, etc.

Will be defined.

9. Contact points

Proposed Chairperson:

Tom Flynn

TFC Research and Innovation Limited

172, Sarto Lawn, Sutton, Dublin 13, Ireland

t.flynn@tfcengage.com

www.tfcengage.com

Secretariat:

Name: To be assessed and determined

CEN or CENELEC Member

CEN-CENELEC Management Centre

To be determined

Programme Manager

CCMC

Avenue Marnix, 17

B-1000 Brussels

www.cen.eu

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Annexes

Annex A SPEEDIER Brochure Factsheet

To be included in a later release.

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