



## **PROJECT PLAN**

### **IB2009 - benchmarking exercise**

international benchmarking of water services covering 2009

Version 1.0  
January 20, 2010

# DOCUMENT MANAGEMENT

## 0.1. Revision history

Version	Date	Occasion
0.1	January 12, 2010	First draft
1.0	January 20, 2010	Final version

## 0.2. Distribution list

Organisation	Name
Programme Committee EBC	Peter Dane (Vewin, chairman) Bertel Ifversen (DANVA, secretariat) Carlos Diaz (Vewin) Jan Egelund Andersen (DANVA) Ole Lien (NORVAR) Irina Nordman (Turku Water Works) Jussi Pirinen (Helsingin Vesi) Mika Rontu (FIWA) Oyvind Ryenbakken (Oslo kommune VAV) Lise Tarp-Johansen (Københavns Energi)
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# 1 Introduction

The European Benchmarking Co-operation is a not-for-profit water-industry initiative for benchmarking water services internationally. The co-operation was initiated in 2004 by the national water associations and several water utilities of Denmark, Finland, the Netherlands, Norway and Sweden.

Objective of the co-operation is to facilitate water utilities in the continuous process of improving efficiency and transparency by:

- offering an international benchmarking programme for water services;
- providing a platform for exchanging best practices of management and operations;
- exchanging knowledge and experiences on benchmarking.

EBC's benchmarking programme is fully supported by the International Water Association (IWA).

This project plan details IB2009, EBC's next international benchmarking project with data of 2009.

# 2 Project objectives

First objective of the IB2009-project is to benchmark water services of utilities in (primarily) European countries, with data of 2009.

Additional objectives:

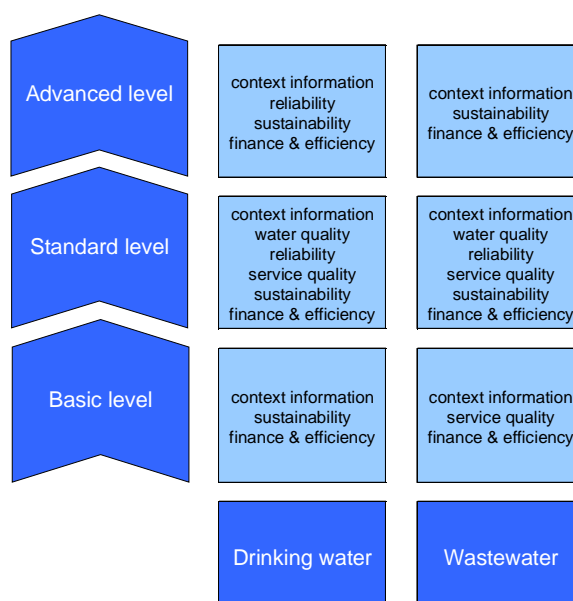
- to interest other potential partners for international benchmarking (individual utilities, national water associations) to join;
- to raise transparency of the programme.

# 3 Starting points

Project starting points are:

- benchmarking drinking water- as well as wastewater services;
- data of 2009;
- final reporting by November 2010;
- performance assessment according to EBC's assessment model. This model distinguishes three different benchmarking levels (basic, standard and advanced).

Participants are encouraged to join all three levels, depending on the availability of reliable data, their benchmarking experience and their ambition.



To indicate the data collection efforts: at its full extension (advanced level), EBC's performance assessment model requires 209 variables for drinking water services and 118 variables for wastewater services<sup>1</sup>.

	Drinking water services		Wastewater services	
	variables (input)	predefined PI's (output)	variables (input)	predefined PI's (output)
Advanced level	107	88	23	40
Standard level	57	63	57	64
Basic level	45	15	38	20
Total	209	166	118	124

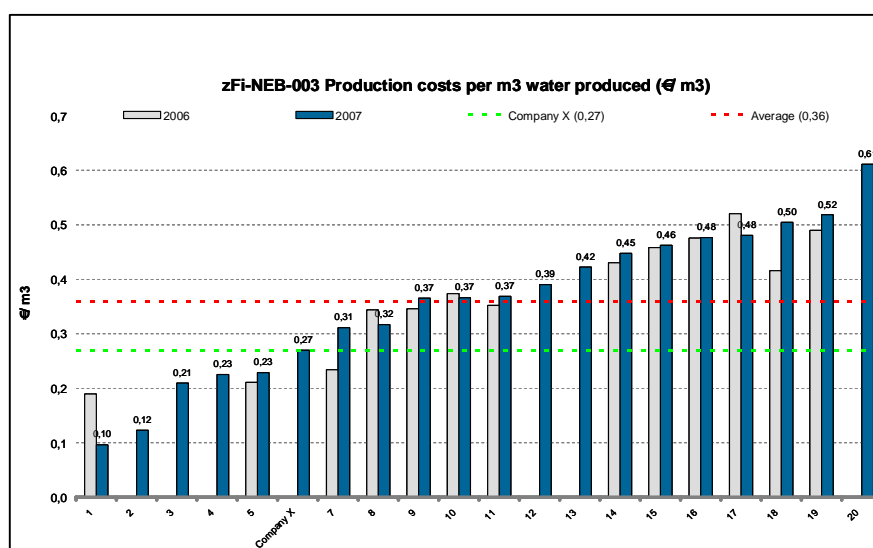
Experience shows that benchmarking at the advanced level requires more effort, but pays off in terms of more detailed analysis and better insight;

- participants can compare themselves with other utilities at the benchmarking level they choose to participate at and as far as they have entered the required data;
- EBC-partners and participants endorse the EFQM European Benchmarking Code of Conduct [Reference 1] and act accordingly;
- names of the participants and their general characteristics are considered to be public information;
- EBC-partners and participants confidentially handle all individual utility data/-results that is submitted/exchanged within the project;
- meetings are as limited as possible because of time and travel- and accommodation expenses;
- the project language is English. This includes all communication, documents and tools.

## 4 Project deliverables

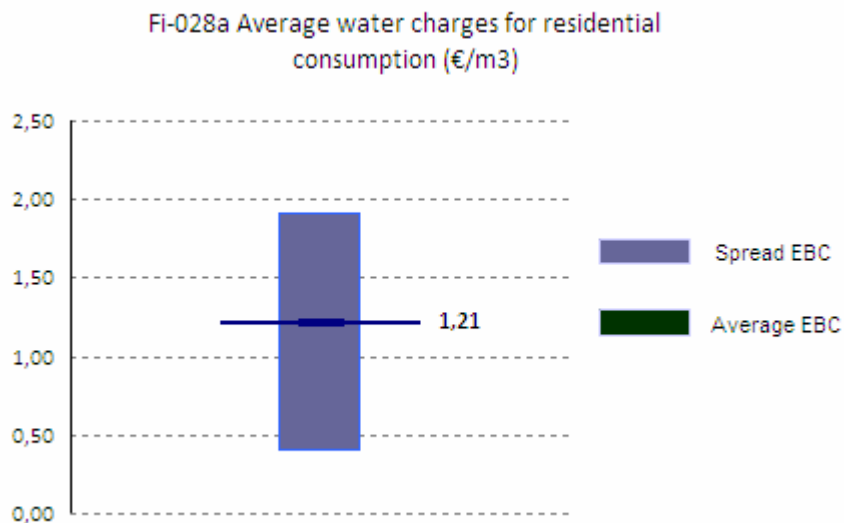
Deliverables of the project (output) are:

- possibility to view detailed (confidential) results on-line (until one year after finalising the project);
- individual (confidential) management summaries in which – for selected key performance indicators - utilities are compared with the other participants in an anonymous way. Figure 1 shows the standard way of PI-comparison:



<sup>1</sup> According to the methodology used in the previous benchmarking exercise IB2008. The number of variables / PI's might change slightly in IB2009 due to methodology improvements / participants' suggestions.

- a workshop to discuss results, exchange best practices and prepare improvement measures;
- a (fully anonymous) public report, to inform stakeholders about the benchmarking programme, the participants and main results at group level. Figure 2 shows an example of a graph to illustrate group results without disclosing individual performance information:



- an evaluation of the methodology, the tools and the project.

## 5 Target group

The EBC-partners, supported by IWA, encourage European water utilities that are interested in business improvement to join this leading-edge project. Utilities from outside Europe are also welcome, but might be in a different operating environment that need special attention when comparing. The aim for the IB2009-project is to have at least 50 participating utilities, larger as well as smaller ones, water as well as wastewater.

## 6 Organisation

### EBC

The project is organised under the responsibility of EBC's Programme Committee and supervised by EBC's Steering Committee.

On behalf of the Programme Committee, Vewin, the Association of Dutch Water Companies, acts as the Project Co-ordinator.

The programme is managed by a Programme Manager (Mr. Peter Dane from Vewin) and an Administrator (Mr. Carlos Diaz from Vewin).

### Participants

On the registration form, participants indicate which persons will represent the utility in the contacts with EBC:

- a management contact for official communication and
- a benchmarking co-ordinator, responsible for operational matters and –communication.

## 7 Project outline

### Process

At the start, a training/kick-off meeting is organised. This meeting aims to inform participants (benchmarking co-ordinators) in detail about the benchmarking process and (changes in) the methodology.

Participants collect the required data themselves and enter these in EBC's database via a secured, web-based data collection tool. Explanatory documents and help-sheets are available on-line. For assistance with data collection/definition issues EBC offers a helpdesk, to be contacted via e-mail or telephone (the "Administrator"). If necessary (to be judged by the Project Co-ordinator) there will be limited on-site assistance. The benchmarking co-ordinator of a utility is responsible for timely data submission and project communication.

After the draft reporting, a workshop is organised to discuss (draft) results, identify best practices and prepare improvement measures. For this workshop, EBC recommends that utilities are represented by their benchmarking co-ordinators as well as management- and business process representatives.

### Overall planning

Activities / milestones	Planning
Call for registration	February - March 2010
Training/kick-off meeting	April 14, 2010
Data collection	May - July 2010
Analysis of data	August 2010
Draft reporting	September 2010
Workshop to discuss draft results, best practices and improvement measures	October 7 - 8, 2010 *
Evaluation	October 2010
Final reporting and project closure	November 2010

\* preliminary date

## 8 Participation costs

The costs for the benchmarking project consist of:

1. costs of activities of participants themselves, like:
  - o labour costs;
  - o travel and accommodation costs for attending the training/kick-off meeting and the workshop;
2. common project costs, like:
  - o labour costs, travel and accommodation costs of the Project Co-ordinator;
  - o external assistance of the Project Co-ordinator by a consultant;
  - o organisation of the training/kick-off meeting and the workshop;
  - o IT-costs (like the website, database, certificates, licenses);
  - o communication costs, printing, mail.

Participants cover the costs of their own activities themselves.

Additionally, to cover the common project costs, participants pay a (not-for-profit) participation fee of € 8.250, -. Since the EBC-partners want to encourage smaller utilities (defined as serving less than 100.000 inhabitants) to join, these utilities pay a reduced fee of € 1.200, - when just joining the basic level.

Depending on sponsoring opportunities, attendants of the workshop may be required to pay a separate (still to be determined) fee to cover the costs of the venue and catering.

## 9 Conditions for participation

Conditions to participate in the IB2009-benchmarking project are:

- to complete and sign the registration form;
- to handle all individual utility data and -results that is exchanged within the project confidentially;
- to endorse the EFQM European Benchmarking Code of Conduct [Ref. 1] and act accordingly;
- sufficient knowledge of the English language for the utility representatives;
- availability of an internet connection and software like Windows<sup>®</sup>, Internet Explorer<sup>®</sup> and Office<sup>®</sup>
- to pay the applicable participation fee and other to be charged costs, if any, within 30 days after invoicing.

For a successful benchmarking exercise, EBC expects participants to:

- provide the Project Co-ordinator in time with the necessary company information (profile, annual report);
- submit the required data in time, with sufficient confidence grade;
- adequately respond to questions of the Project Co-ordinator;
- attend to the workshop and actively contribute to it.

## 10 Registration

Interested utilities can register by submitting the attached, completed Registration Form. Closing date for registration is April 1, 2010, to be in time to attend the training/kick-off meeting.

Utilities that wish to join after this date are still very welcome, however late registration might results in not being included in the written reporting. In case of doubts, please contact he Project Co-ordinator.

If, unexpectedly, the number of registered utilities at the closing date would be too low to cover the common project costs, EBC has the right to stop the project or – in co-ordination with participants - continue it in an alternative way.

## 11 References

1. EBC (2009). *Methodology Part I – Management Summary and Methodology Part II – Reference Guide*. European Benchmarking Co-operation, c/o Vewin, the Netherlands.
2. EFQM (2007). *EFQM European Benchmarking Code of Conduct*. European Foundation for Quality Management, Belgium.