



## Manual – Datasheet

General instructions for the queries and the handling of the data-collection datasheet for WP4 and WP5

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## 1. GENERAL INSTRUCTIONS FOR WORKING WITH THE DATASHEET

The Data collection file is an excel workbook with 3 sheets:

1. The datasheet – This is the tool to collect the data of your regular interviews and it is set up to be used for an entire year<sup>1</sup>.
2. The calculation sheet – This is a sheet used only for calculation of averages and aggregations, it's hidden and you don't need it.
3. The overview sheet – This is the overview of the data you are entering in "datasheet". It contains all the data you need to transfer to the data interface. After every data collection you need to export it to a new file (yellow button) and send it to HFA, WIP and FORCE.

Please use **an extra file for each country** you are responsible for. E.g. if you are responsible for datacollection in France and Belgium, than use 2 files, one for France, the second for Belgium.

The datasheet is equipped with several formulas on the top. The area containing the formulas is protected and hidden.

To prevent distruction of the datasheet important parts are protected. Only those parts necessary for data entry are unprotected. Still the unprotected parts require special formats (see also "conditional formats") which could accidentally be transferred to other cells by copying. Therefore please

- ⇒ **You can fill in and delete text in the unprotected cells and numbers in the cells but:**  
**never copy/paste any!!!** – by copy/pasting a cell, the formats can be changed.
- ⇒ **If you need to copy data into the unlocked cells than please do this with the function "paste special" by selecting "values" (see figure 1). You can find "paste special" in the "Edit" menu**

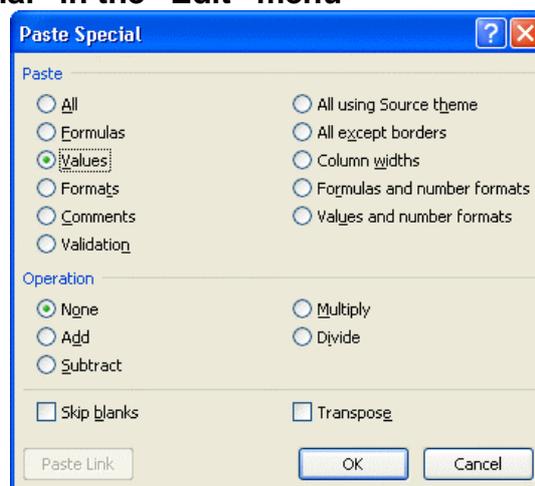


Figure 1: Window-menu of the paste special function in excel.

<sup>1</sup> The datasheet contains the monthly and quarterly data (prices and storage) from the actual year, and the annual data of the previous year.

Several formulas calculate aggregated data. To ensure that all data entries are recognised by the formular, keep to the following instructions.

- ⇒ **Numbers have to be entered without dots inbetween (Thousands-Separator) and without units (Examples: 20 instead of 20%, 1500 instead of 1.500 tonnes).**
- ⇒ **If you have no data to fill in and no drop down available leave the cell empty (make no other entries like "--")!**
- ⇒ **The **LAST UPDATE** has to be written like dd.mm.yyyy.**
- ⇒ **If available (**STANDARD**, **FOREIGN COUNTRY**) always choose one of the answers of the drop downs. Only in the columns **CONTACT DATAS** and **DATA SOURCE** you are allowed to write your own text.**

The former data sets of producers, traders/retailers (note the new definition<sup>2</sup>) and consumers were united in one file. For the process of questioning it is essential to know the business operating area for each company.

- ⇒ **Define for each company the relevant **BUSINESS OPERATING AREA** (mark the appropriate cell with "x"). You are allowed to mark more than one **BUSINESS OPERATING AREA** per actor.**

Questiones which are not relevant for a company will show grey coloured cells (as soon as the **BUSINESS OPERATING AREA** is defined).

- ⇒ **You don't need to fill in grey cells. If grey cells still contain text or numbers check the definition of the **BUSINESS OPERATING AREA** (see also conditional formats).**

In the prefilled files you got from HFA, the existing data sets of producers, traders/retailers and consumers have been united in one sheet. Therefore there are double records for all producers because they have been added to the list of traders/retailers previously.

- ⇒ **Transfer all data of the double mentioned producers in only one data set and make sure that no data are lost. Remember to assign the company to the relevant **BUSINESS OPERATING AREA**.**

## 2. TECHNICAL COMMENTS ON THE DATA-COLLECTION-SHEET

### 2.1. Macros

The Data collection file contains Macros which you should activate when you open the file. This may not work because of the security settings of your excel program. In this case you should change the security settings. To do this by selecting tools -> macro -> security and set the security from very high or high to medium (see

<sup>2</sup> A **wholesale merchant** or **trader** operates in the chain between producer and retail merchant. Some wholesale merchants only organize the movement of goods rather than move the goods themselves. Please note: If a producer is selling to traders or retailers than he is also considered as a trader. A **retail merchant** or **retailer**, sells pellets to end-consumers (including businesses). A shop owner is a retail merchant. If a producer sells to endconsumers he is also a retailer.

figure 2). Then save the file, close it, and when you open it again you will be asked if you want to activate the macros. Answer this box by activating the macros.

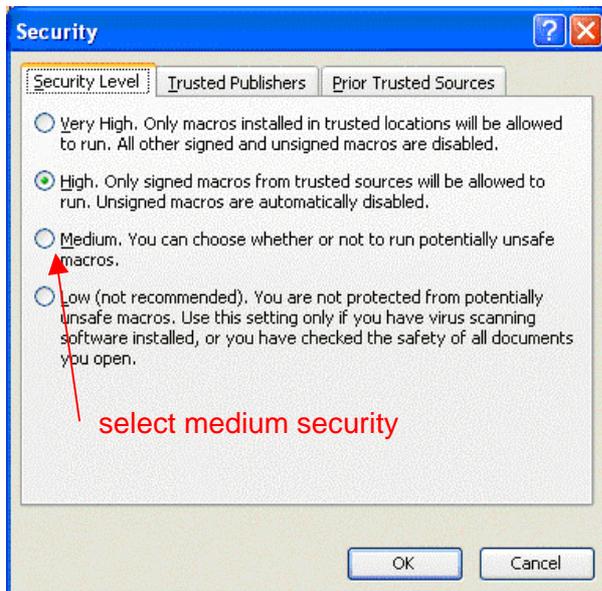


Figure 2: Changing the security settings of your excel.

## 2.2. Conditional Formats

The cells provided to fill in data have been equipped with conditional formats. I.e. the formats of the cells change automatically depending of the data you have filled in the datasheet. That's intended to be a support in finding data gaps and inconsistencies. Three formats have been defined; in the following the meaning of the formats will be explained:

- ⇒ **Cells in dark grey:** The Market actor is not part of the interview sample (e.g. because he doesn't wish to be interrogated or the company is too small) but the **CONTACT DATA** of this market actor are still listed on the web page. In **PART OF INTERVIEW SAMPLE** (column T) is selected "no", thus no data have to be filled in the cells. In the column T the value "no" is predefined, in the way that all empty lines appear dark grey.
- ⇒ **Cells in light grey:** No data have to be filled in the cell because the market actor is not active in the business operating area. Example: for a pure retailer no production capacity has to be entered.
- ⇒ **Cells in red:** Data are missing in this cell or group of cells or the entries are not consistent. Example 1: For each market actor a business operating area needs to be defined. As long as no business operating area is defined, the cells with basic data appear red. Example 2: For each trader or retailer you need to insert a figure for **TOTAL SALES**. As long as this figure is not entered, the cell appears red. Example 3: The percent in **SALES IN HOME COUNTRY** and sales in **FOREIGN COUNTRIES** must add to exactly 100 % (use the term "Other country" in the drop down to achieve this result). The same counts for purchases.
- ⇒ **Cells in white:** The required data have already been entered. In some cases cells appear white although no data are entered. For these cells the existence

of data is possible but not in all cases. Example: Not every trader or retailer will sell pellets outside of his own country. Therefore the corresponding cells can appear white.

⇒ **Cells in orange** (overview): Large scale consumers are marked in orange in the overview. Their contact data will not be published in the internet.

Please note, that the conditional formats are intended to be a support in finding data gaps but have no impact on the background calculations and on the outcome of the excel sheet. In some cases the formats may not work exactly, therefore you always need to control the consistency of your data independently of the formats and colours which appear.

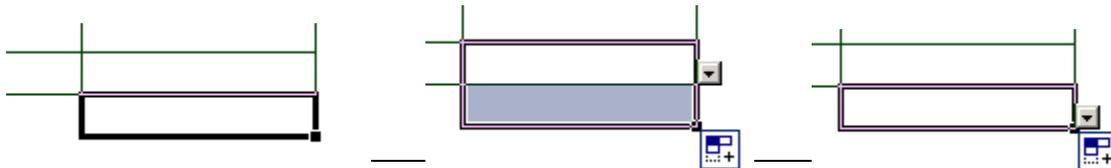
The cells containing conditional formats are not protected, thus they can be changed and deleted by you, for example by copying contents from other cells. (Therefore copy only with “paste special” / see also Figure 1)

### 2.3. Data Validation (predefined values and drop down lists)

Some columns, for example those containing the **FOREIGN COUNTRIES** are equipped with data validation function and drop downs. The cells can only be filled with predefined values. For example in column T (**PART OF INTERVIEW SAMPLE**) you can only enter “yes”, “no” or leave the cell empty (which has the same effect as “yes”). You can choose “yes” and “no” in the drop down menu which appears when you click on the cells.

**IMPORTANT: Several calculations in the background depend on the predefined values of the drop downs. Therefore do not change dropdowns and data validity to make sure that only the predefined values can be in the cells.**

Please note that the defined data validations can be copied in other cells with the copy/paste and auto fill functions. Figure 3: Clicking on the black square in the lower right corner of an activated cell and copying the contents of the cell to the next cell by dragging the black square will also copy the defined data validation and the drop down menu.



**Figure 3: The activated cell in the left figure has no drop down. By using auto fill (figure in the middle) the drop down has been copied from the upper cell to the cell below (figure on the right).**

For this reason **you must NOT use copy/past and the auto fill function** to copy contents of cells.

### 3. EXPLANATIONS FOR EACH SECTION OF THE DATASHEET

Relevant sections for each **BUSINESS OPERATING AREA**.

	Contact data	Production	Storage	Endconsumer prices	Sales	Purchases	CIF ARA prices	Consumption
Producer	X	X	X					
Trader	X				X	X	(X)	
Retailer	X			X	X	X		
Consumer	X						(X)	X

There is one datacollection in the beginning of the year for all data. **CONTACT DATA** have to be checked and updated and all other data have to be filled in anew.

The data **STORED AMOUNT**, **ENDCONSUMER PRICES** and **CIF ARA** prices have to be collected quarterly or (prices) monthly.

#### 3.1. Registering a Company

If you add a company to the datasheet do this at the end of the list, add all the contact data and fill in the **DATE OF REGISTRATION**. This date tells you, since when the company is part of your list and is important for the updating of the webpage. (New companies need to be added to the list of market actors, on the webpage). For all companies listed 2007 we have set the **DATE OF REGISTRATION** on the 30.09.2007.

#### 3.2. Unregistering a Company

If a company doesn't exist any more or doesn't produce, trade or consume wood pellets, the company needs to be unregistered and deleted from the list of the webpage. To keep evidence of the held contacts till the end of the project, let the contact data remain in the datasheet, and fill in the **DATE OF UNREGISTERING**. This date tells you, that the company is not anymore a market actor and is also important for the updating of the webpage. If you unregister a company by entering the **DATE OF UNREGISTERING**, mark also the column **PART OF INTERVIEW SAMPLE** with "no" and delete all entries (including the business operating areas) except for the CONTACT DATA.

#### 3.3. Including/excluding a company from the interview Sample

Each beginning of a new year you need to decide for every company on your list if you will interview the company throughout the year or not. If you decide so, than you have to set the cell **PART OF INTERVIEW SAMPLE TO** to "yes" or "no". Depending of this setting the line will appear either in **dark grey** or in other colours (see also conditional formats).

#### 3.4. Production 2007

The **CAPACITY PER LOCATION** (in the end of the year in question, i.e. 31.12. of the elapsed year) must be given for each producer on your list; if you don't get the information from the companies you have to make an estimation and fill it in the column **ESTIMATED CAPACITY**; the computer will calculate an estimated total production capacity automatically. Depending on how many capacities you estimated there will also be calculated a data quality parameter (see overview sheet). If in **PART OF INTERVIEW SAMPLE** (column T) is selected "no" you still have to fill in the **ESTIMATED CAPACITY** (only for registered companies) and leave all other cells empty.

At **CAPACITY UTILISATION** fill in the production numbers (tonnes last year) you get from the companies. Where you get no information leave the cell empty; the computer will calculate an estimated total production related to the production capacity automatically.

The column **STANDARD 1** must be filled in for all producers (at least with the note “No standard” from the drop down). The other two columns **STANDARD 2** and **STANDARD 3** are optional.

### 3.5. Storage 2008

At **STORAGE CAPACITY** for loose pellets only fill in the numbers (tonnes) you get from the companies. Where you get no information, **please leave the cell empty**; the computer will calculate an estimated total storage capacity related to the production capacity automatically.

Quarterly you have to collect the actual **STORED AMOUNT** (tonnes); out of the available data the computer will calculate the storage utilisation automatically (see overview).

### 3.6. Endconsumer prices 2008

The column **STANDARD** must be filled in for all retailers who give a price information (at least with the note “No standard” from the drop down). Fill in the prices quarterly or monthly (corresponding to our decision of Copenhagen). Important: Even if you decided to make your interviews quarterly, you must enter a price for each month. The only difference with the quarterly data collection is, that the price data are collected with a delay of 1 or 2 months compared to a monthly collection.

### 3.7. Sales 2007

Fill in the actual amount of **TOTAL SALES** (tonnes, last year) and make all other entries in percent of **TOTAL SALES**. The entries of **SALES IN HOME COUNTRY, FOREIGN COUNTRY A, B, C** must add to 100 %. The specifications of **SALES WITHIN HOME COUNTRY** are necessary for weighting the endconsumer prices and must add to 100 % likewise.

### 3.8. Purchases 2007

Make all entries in percent (we presume that total purchases in tonnes = **TOTAL SALES** in tonnes). The entries of **PURCHASES IN HOME COUNTRY** and purchases in **FOREIGN COUNTRY A, B, C** must add to 100 %.

**IMPORTANT:** There is still a column for **MOST FREQUENT STANDARD** within the area of purchases. **You don't need to fill in that column,** it will be cancelled (Column “CE”). We assume, that the purchases will have the same quality standards than the sales.

### 3.9. CIF ARA prices 2007

The column **STANDARD** must be filled in for all traders who give a CIF ARA price information (at least with the note “No standard” from the drop down). Fill in the prices quarterly or monthly (corresponding to our decision of Copenhagen).

For the international traders CIF ARA prices are the most relevant. All other prices in other European (inland) ports can be deducted. The prices are usually for delivery two months ahead. The CIF price (delivered price in the Rotterdam port) is an important price to have for comparison.

### 3.10. Large Scale Consumption 2007

The wood pellet consumption (large scale) gives information about large scale consumers like e. g. heating plants, power plants or even coal power plants too, if they do cofiring with pellets. Please fill in the figures for the **INSTALLED THERMAL OUTPUT MW<sub>th</sub>** and the **INSTALLED ELECTRICAL OUTPUT MW<sub>el</sub>**, if there is one, in order to describe the plants. If there is no information needed (e.g. the electrical output at heating plants), leave the cell empty (do not fill signs like "0" or "-"). The **WOOD PELLET CONSUMPTION** fill in without units again. In the column **COFIRING PERCENTAGE** please insert the percentage of electricity which is produced from pellets.

## 4. THE OVERVIEW SHEET AND FLOW OF INFORMATION

### 4.1. Description of the overview sheet

The content of the overview file is the list of actors you filled in the data sheet, with name, address and certain specifications. Additionally there are the aggregated data for each data collection. For January you find an overview of the annual data collection and for all months a short report about the price and storage data you have filled in. The figures about prices correspond to the web interface programmed by FORCE and need to be filled in the interface by each country representative on a monthly or quarterly basis as we decided in Copenhagen.

You'll find the web interface at the following link.

<http://www.pelletcentre.info/mads/dev/enter.aspx>

The password is individual for each country representative and you will get it from Jonas Dahl (FORCE). At the moment the Web interface does not fully correspond to the overview mask, but this will be arranged within short time.

Please note:

**You must not fill in the cells in the overview file.**

The information in the overview file will be calculated by your excel file.

On top of the overview sheet you'll find a yellow button. By pressing this button, you will generate a new file out of the overview sheet. Following messagebox appears to tell you how to save the file:



Please save your files with this mnemonic and send them to WIP, HFA and FORCE.

#### 4.2. Summary of the flow of information

1. The data of the pelletactors are collected either by the country representative or optionally by a subcontractor. For the data collection Questionnaires have been designed as help. The data are to be filled into the data collection sheet (one xl-file for Wood Pellets and a second xl-file for MBP which will follow).
2. The country representative or the subcontractor has to fill in the input mask of the web interface with the data which were calculated in the overview file (<http://www.pelletcentre.info/mads/dev/enter.aspx>).
3. This overview file has to be sent to the WP leaders (HFA, BAPE and FORCE) and the Coordinator by the country representative.

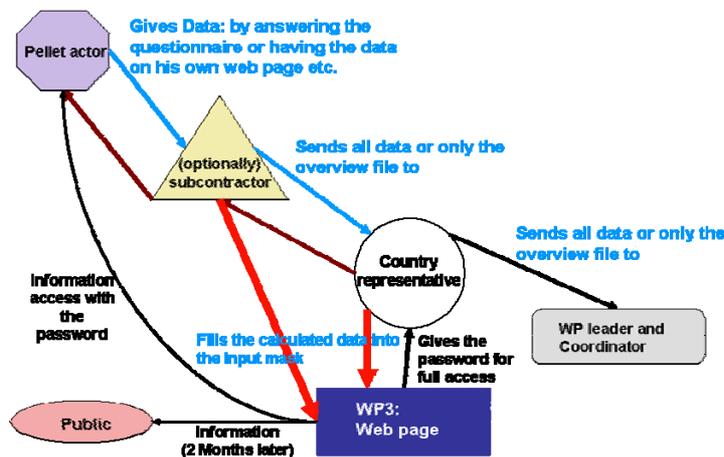
The flow of information is shown in the chart.

As shown in the following chart 1, the extracted file concerning WP4 – wood pellets needs to be sent to Wilfried Pichler at Holzforschung Austria ( [w.pichler@holzforschung.at](mailto:w.pichler@holzforschung.at) )

and concerning WP5 – mixed biomass pellets to Malgorzata Bastian at BAPE ( [mbastian@bape.com.pl](mailto:mbastian@bape.com.pl) ).

Each file has to be sent to the project coordinator Alexander Hoeldrich at WIP ( [Alexander.hoeldrich@wip-munich.de](mailto:Alexander.hoeldrich@wip-munich.de) ),

and to Jonas Dahl at FORCE ( [jxd@force.dk](mailto:jxd@force.dk) ), too.



Pic.1: The flow of information during the data collection phase

#### 4.3. Time-scheme for the flow of information

The Data collection file is set up to be used for one year.

- ⇒ In the beginning of the year the annual data of the previous year have to be filled out

- ⇒ During the rest of the year the monthly and quarterly data of the actual year have to be filled out
  - ⇒ The Year **2007 is an exception** to this rule: annual and monthly/quarterly data of the year **2007** have to be filled out.
- The excel file *timescheme\_datacollection.xls* gives an overview of the process.

## 5. QUESTIONNAIRES/ENQUIRIES

We have prepared two questionnaires as support for the interviews. The questionnaires are equal to the excel sheet except from a few questions which will be explained below. The questionnaire for domestic pellets is made for all market actors which are active in the Business operating areas of A) production, B) Retailing C) Trading. This questionnaire is designed for the needs of most of you, but you can also change it for your needs if you like. Nevertheless in the end you must be able to fill in the excel sheet with the outcome of your method. The questionnaire for industrial pellets will be used only by a few of you end covers the questions for large scale consumers and traders. If you have market actors who are involved somehow in industrial pellets trade, you should consider this questionnaire.

### 5.1. Questionnaire for Non industrial pellets

The questionnaire is in line with the excel-sheet apart from a few exceptions.

- There is no question for “most frequent standard for purchased Wood-pellets”. The corresponding Column (“CE”) in the excel sheet doesn’t need to be filled in (see also 3.8).
- In question 4 you find the question for certificates for several standards. There is no column for that answers in the excel sheet. But you should enter that standards in the excel-file only if a certificate is available.
- In question 8b you find the category to other traders/retailers. Fill in that percentage in the column “BN” – to other traders. If an actor sells to traders and retailers these two percentages have to be added. Example: a producer sells 100 % in his home country, out of this he sells 50 % of his pellets to a trader, 30 % to several retailers and 20 % loose to endconsumers. Then you have to fill in the column “BN” **80** and in the column “BO” **20**.

### 5.2. Questionnaire for industrial pellets

In the questionnaire for Industrial pellets you will find extra items which are not in the excel-sheet. If you have to ask industrial pellet actors (like large scale consumers or traders) than you should to ask this questions to get a first impression. This relates to following items in the industrial pellets questionnaire.

- Mixed biomass pellets consumption
- Other solid or liquid biomass source
- Storage capacity at the power plant
- Expectation of CIF-ARA prices in one year