

Action group ENT19: “Electric Road Transport”

Call for tenders on two studies with relevance for “Electric Road Transport”

Study 1:

A report on relevant end-user groups for “Electric Road Transport” in Europe, their needs, related markets, and integration into the existing transport system.

and

Study 2:

A handbook for the implementation of “Electric Road Transport” policies in Europe

These studies are to be considered as research and development in the field of a deployment strategy for electric road transport in Europe. They will need to be carried out in a scientific and profound manner. All results will become publicly available.

1. Specific information regarding the national funding and procedures

For detailed guidance on national procedure, please contact your national contact points. Contact information to be found at the end of this document.

2. General information about this call for tenders on two studies

2.1 Aim and concrete objectives

The general aim of this call for tenders is to improve the co-aligning of the different national policies and action plans to promote electric road transport in Europe. Main driver behind this alignment action is the expected positive effect of a common approach on the market development of electric road transport in Europe.

This general aim will be brought closer by the studies that are the subject of this call for tenders. These studies have three concrete objectives:

1. To establish an overview of the most relevant Electric Road Transport end-user groups in Europe, their specific needs and potential markets (Report of the first study).

2. To arrive at recommendations regarding the integration of electric and electric-hybrid vehicles into the whole transport system (Report of the first study).
1. To improve the implementation of Electric Road Transport policies in Europe ("The Handbook" i.e. report of the second study).

The target group for both studies is foreseen to be the public administrations in the EU Member States with a special focus on the countries that are involved in this joint assignment. Furthermore, the recommendations in both reports are expected address different organisational levels (local/regional, national, EU).

2.2 Preferred focus areas and scientific content

Study 1. A report on relevant end-user groups for "Electric Road Transport" in Europe, their needs, related markets and integration into the existing transport system.

This study includes:

- a) functional vehicle specifications (such as carrying capacity, speed, range per day etc.) for each of the end-user groups;
- b) description of potential markets for fully electric and electric-hybrid (BEV and PHEV) vehicles in Europe;
- c) recommendations regarding the integration of electric and hybrid vehicles into the whole Transport system (one chapter in the final report).

This report shall identify (for 2 phases/ see below) the most relevant Electric Road Transport end-user groups and will link their transport needs to specific functional specifications for hybrid & electric vehicles. This shall be followed by a description of potential markets, and some first-hand analysis of the availability of vehicles to meet those market needs. The underlining key assumption here is that many similar small groups (nichés) can be identified at national level, and those may form a large group on European level. Large enough for the vehicle manufacturer to find the market potential appealing.

In addition, recommendations (on a more general level) shall be developed on the possibilities and necessities of a stepwise integration of Electric Road Transport into the road transport system.

This research shall have to take into account two different phases in the deployment of electric road transport:

- the first phase of deployment deals with the first generation hybrid & electric vehicles
- the second phase of deployment deals with the market introduction of second-generation vehicles.

Both phases will be confronted with the challenge to integrate electric road transport in the public space. This entails amongst others the transport and energy infrastructures and the supplementation to public means of transport.

Furthermore, this study shall need to analyse the differences and similarities between the two phases described above in order to identify how investments in phase 1 can take into account the later developments in phase 2. This will enable an efficient use of available public (and private) funds from the longer term perspective and an accompanying, preparatory transport policy framing.

Research sources and elements

The minimal sources to be investigated are:

- existing demonstration projects on electric-hybrid vehicles
- existing reports addressing the objectives and research questions of the proposed research.

Important stakeholder groups to be investigated are:

- public and private fleet owners and managers in Europe
- commuter groups
- other groups of end-users (car drivers' associations etc.);
- end-users/consumers at large
- involved public administrations
- car leasing companies
- operators (e. g. of car sharing agencies etc.)
- electricity providers (utility companies)
- the OEM's and importers of hybrid-electric vehicles in Europe
- maintenance units

Research questions

The research questions minimally to be addressed are:

- Which relevant end-user groups can be identified for the two phases (see above) in Europe?
- Which specific transport demands and needs (in functional terms) have each of these groups?
- To which functional vehicle specifications (total daily kilometres, relative vehicle cost, activity intervals per day, occasional long-range holiday use etc) does this lead per specific group?
- Which potential markets for electric & electric-hybrid vehicles can be identified based on the functional specifications per end-user group?
- What are the main elements for integration of electric road transport in the existing transport system (one chapter in the final report)?

Study 2. The handbook on Electric Road Transport policy implementation

The handbook shall identify the main market barriers for deployment and possible policy measures that can help overcome these barriers and turn them into practical matters that can be dealt with.

It shall contain a roadmap for the European deployment of Electric-Hybrid mobility, thereby specifying the role of the public administration and distinguishing between the different organisational levels (EU, national, local/regional). Special attention shall be given to the best options for public-private partnership and how to involve the private sector.

Research sources and elements

The minimal sources & research elements to be investigated are

- the relevant national action plans and policies on Electric Road Transport in Europe
- existing handbooks on policy implementation and clean vehicle deployment
- success cases of clean(er) vehicle implementation
- existing know-how and documents on green procurement for clean vehicles.

Research questions

The research questions minimally to be addressed are:

- How do the national action plans & policies relate: similarities/ differences/ what's missing/ opportunities & treats etc.?
- What are the main national drivers and barriers for implementation?
- Are future demands in the EU market development of Electric Road Transport sufficiently addressed in the existing national action plans?
- On which end-user groups and which functional vehicle specifications are the national action plans and policies focusing? Which are missing (blind spots)? Which barriers aren't addressed? Possible solutions for this?
- What is the influence of EU "hypes" in policy formulation on the innovative capacity & willingness of EU companies?
- What is the role of national governments in the market development of Electric Road Transport? Especially in relation to local & regional initiatives?
- How can public-private partnerships most efficiently contribute to the market development of Electric Road Transport?
- Which recommendations can be given on policy measures (both regulating & stimulating) that effectively overcome the barriers for the large scale implementation of electric-hybrid vehicles (should distinguish between different market development phases)
- How can international green transport procurement be organised effectively?
- How can the problem of diminishing fuel tax revenues as a consequence of electric driving be solved?

General information for both research parts

The (scientific) content of the research

Of paramount importance is the quality of the recommendations and information in both reports. The (scientific) content of the studies resulting from this call for tenders need not be restricted to the elements mentioned above, but at least these elements need to be considered. It is important that the objectives of this call for tenders are achieved by the submitted proposal to a level that is in balance with the cost of the studies.

Methodology

The research proposal needs to contain a clearly worked out research methodology in which all the elements that are described above are addressed and brought together in a logical sequence of activities and analysis. This methodology will minimally contain: -different well described research phases and the links between them; -clear milestones that mark the end of a research phase; -an explicit timeline; -a clear description of the desired end-products including report outlines.

Scope

The scope of these studies is limited to electric & hybrid-electric vehicles used for road transport (European vehicle categories L5, L6, L7, M1, M2, M3, N1). Electric transport by other modalities is quite important as well, but not part of this call. Although the primary geographical focus is on the countries involved in this joint assignment, other European countries need to be investigated as well, especially the countries with important car industry (France, Germany, Great Britain, Italy, and Spain) or an ambitious action plan/policy on electrical mobility, like Denmark. As far as the barriers for market development - and the policy measures to overcome them - are concerned, information and know-how may also originate from locations outside Europe, like the USA or Japan.

Discussion of intermediate results

For both studies an outline of the study and a draft report need to be presented to in a meeting, discussed and approved of by an advisory panel within 8 weeks after the project has started. This evaluation shall be made by a panel consisting of persons appointed by the principal member states behind this call.

Approval of the final reports

Draft versions of the final reports shall also need to be brought forward in advance for discussion and final approval in a similar manner by the advisory panel appointed by the complete consortium of principal countries.

Readability/ practical usefulness

Both reports shall be written in English language. The final handbook and report need to be suited for practical use and shall contain short and concise summaries. Background information needs to be placed in Appendixes, the Outline should be simple and straightforward and users should be able to quickly find the specific information they look for (see also the paragraph on Criteria).

Integrated research

Both studies need to be undertaken by the same research consortium, in order to achieve maximum synergy between both studies.

2.3 Involved countries, programmes and budgets

The countries involved in this joint call are Austria, Finland, the Netherlands, Norway and Poland. Each of the participating country shall provide an equal share to this project, in a manner that limits the maximum cost of this call for tenders to € 206.000,- (VAT excluded).

	Total inc. VAT	Vat	Excl. VAT
Finland ¹⁾	49 750	22 %	40 779
Netherlands	49 750	19 %	41 458
Austria	49 750	20 %	41 458
Norway	49 750	25 %	39 800
Poland	49 750	20 %	41 458
Total	248 750		204 954

¹⁾ VAT for government owned R&D entities is 0 %

Table 1 lists the organisations and national programmes that are the source of the funding in each country.

Table 1: Funding

Country	Funding Organisation - Programme	Approximate call budget in €
Austria	BMVIT / IV2Splus Trans-National Program Scheme, refer to http://www.bmvit.gv.at/en/innovation/mobility/iv2splus_transnational/index.html For more information and proposal forms refer to http://www.ffg.at/content.php?cid=1006	49.750
Finland	Ministry of Transport and Communications [http://www.lvm.fi/web/en/home] TransEco [www.transec.fi]	49.750
The Netherlands	SenterNovem / Clean & Energy Efficient Transport	49.750
Norway	Research of Norway, RENERGI-programme. www.rcn.no	49.750
Poland	The National Centre for Research and Development Skorupki Str.4 00-546 Warsaw, Poland www.ncbir.pl	49.750

2.4 Funding arrangements

The research of this joint assignment will be funded from national sources (Table 1) and will be subject to the national funding rules. Each participating funding agency is to make its own separate arrangements for funding the national participant(s). The public budget therefore follows the national rules and regulations.

The total funding budget is limited to € 206.000,- (excluding VAT) for the total project (see table 1).

For details please contact your national agency or see the country information on the respective websites.

This research can be funded only during the year 2010. Therefore, the study needs to be completed within year 2010.

2.5 Timeline for submitting & evaluation of proposals

- Proposals must be submitted to your participating national funding agency by and the Call secretariate: **23th of February 2010**
- Final decision by the National programmes: **2nd of April 2010**

Table 2. Overview timeline

Latest opening date for the Call for tenders on Policy Research for Electric Road Transport	Medio December 2009 (exact date may differ per country)
Deadline for submitting National and common proposals	23rd of February 2010
Deadline for final national decisions	2nd of April 2010

2.6 Timeline and Milestones for the research project

The project is expected to last 36 weeks from the initiation. The following is a draft timeline for the execution of the project with important milestones.

- A) Start of the research project : **5th April 2010**
- B) Draft outline reports : **28th May 2010**
- C) Final outline reports : **11th June 2010**
- D) Draft report study 1 : **2nd August 2010**
- E) Draft report study 2 : **29th October 2010**
- F) Final reports : **6th December 2010**
- G) End of project : **13th December 2010**

	April				May				June						July			
week	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	
week	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	
milestone	A							B	C									

	August				September					October					November				December	
week	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	
week	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	
milestone	D												E					F	G	

3. Type of project & consortia

3.1 Type of project

This type of project resulting from this joint call can be labelled as a joint assignment for two studies. As such it will be funded for 100%. This project is expected to provide knowledge through a joint research in which research institutes/ organisations from all the involved countries work together.

This call for tenders on two studies aims at collecting at least 3 different offers, but only those offers that meet the national (and possibly) EU regulations will be eligible for further evaluation.

3.2 Consortium composition: who can apply

Proposals are invited from consortiums. To be eligible, a consortium must include at least one partner from all the countries involved in this joint call (A, FI, NL, NO, P), as the project outputs are expected to provide benefits to all partnering countries. Consortiums can consist of companies, institutes, and/or research organisations depending on national funding conditions. *Be aware that the respective national criteria apply for all of the individual partners in the consortium!*

The proposal has to contain a so called “track record” or “reference list” in which the experience of all partners with international studies and with studies in the field of sustainable mobility is clearly shown. In particular experience in the area of deployment of clean(er) vehicles and fuels is considered important and will be used as a criterion for eligibility.

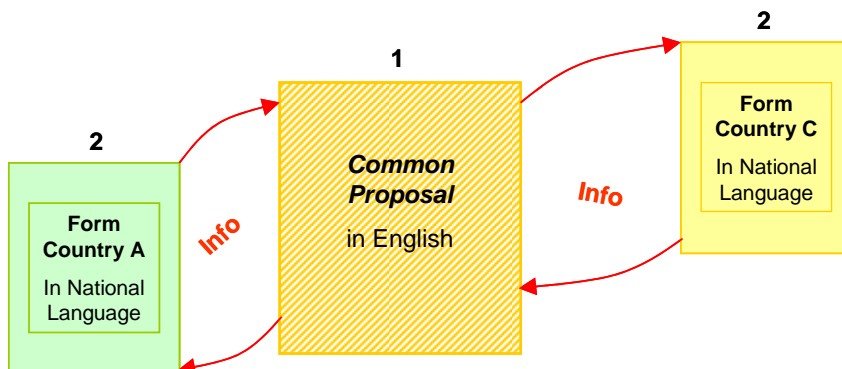
3.3 Consortium agreement

A consortium agreement between the partners is obligatory, in order to agree on Intellectual Property Rights (IPR) and other relevant issues dealing with responsibilities within the project and the exploitation of results. However, the IPR of all the project reports must be assigned to the public administrations of the involved countries, and the reports shall be made publicly available after the end of the project. This consortium agreement must be signed by all the project partners before the any payments can be made.

The consortium agreement has to contain an overview table in which all the involved partners with their explicit role and their national funding needs are mentioned.

4. Submitting proposals

4.1 Submission Procedure, Forms and Languages

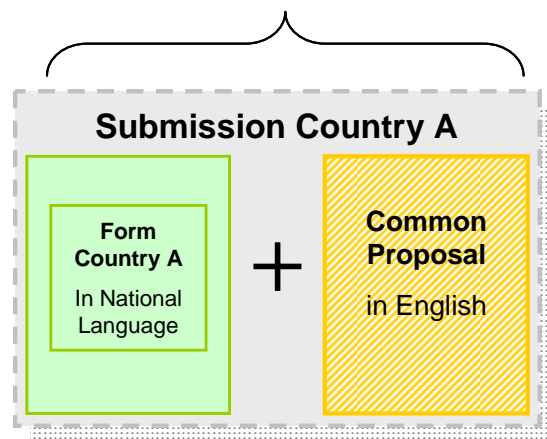


The proposals for this joint assignment shall be structured around **two application documents: one on national and one on international level.**

1. On international level: a **Common proposal written in English**, which contains all relevant information about the joint project. This will be evaluated as one entity by the respective national Funding Agencies and/or financing bodies of the Member States that are represented in the project consortium, and will form the basis for the funding decision.

2. On national level: a **standard application form in national language** specific to the national funding agency financing body. This shall describe only the involvement and funding requirements of the national applicant(s) (see National Guidelines). The information within this document serves as a national project proposal, and forms a basis for the national funding agreement. The common proposal in English will be an attachment to the standard national application form.

e.g. Funding Agency A



These two documents should be submitted by each project partner to their participating national funding agency and/or financing body (see list of national contacts in chapter 7).

4.2 Structure of Common Proposal

The Common Proposal document should be structured as follows:

1. First page:
 - Project Title (max. 150 characters).
 - Duration in months.
 - Applicant details (table: institution, name of contact person, contact information).
2. Financial summary table – totals only, (in €) for overall costs, costs per partner, required national funding per partner.
3. Executive summary (300 words).
4. Short description of the research project (objectives, scope, methodology, the communication plan between the partners, and a short description of the work (max. 3 pages).
5. Short description of the consortium (role of each partner organization and of the stakeholders involved) (max 1 page).
6. Project planning and management (this section should include a graphical work plan, a table with deliverables and milestones, and the management structure of the project) (max. 3 pages)

7. Financial details of assigned resources/man-hours and associated budgets (max. 2 pages).
8. Project outcomes (implementation and exploitation plan: implementation should involve all participating countries) (max. 2 pages).
9. Background and competences of participating organizations and key individuals (max. ½ page per partner organization plus ½ page per key person involved).

The proposal should be written using the Times New Roman font with a minimum acceptable font size of 12.

4.3 Where to submit per Member state

Each proposal is submitted to **all** of the respective national Funding Agencies / funding bodies of the Member states that are represented in the project consortium and the Call secretariat. The submission to the call secretariat should be sent as a PDF by email. See chapter 7 for an overview of where to submit the project proposals.

5. Assessment of proposals

5.1 Assessment procedure

At the start of the evaluation process, all proposals will be assessed by the respective funding organizations/ funding bodies involved in the call. The national advice on the proposals is to be given as follows:

- Very positive: green
- Positive: orange
- Negative: red.

Only the positively rated proposals (green & orange) will go further into the procedure.

Step 1 is that all the orange/ green proposals will be placed in a matrix that shows the results of the national evaluation round.

Step 2. The proposal(s) that are rated orange or green by **all** countries will move on to step 3. If there are no proposals that meet this criterion, the proposal(s) that are rated orange or green by **most** countries will move to step 3.

Step 3. If only one proposal is selected no further assessment will be necessary. When several are selected these will be assessed by an International Advisory Committee (IAC). Each of the funding organisations will provide one expert to take place in this committee. The IAC will discuss the proposals in a manner to be organised by the call secretariat and will provide a final recommendation about the proposal to be selected.

Step 4. For legal reasons the final and formal decision will have to be taken by the involved national funding organisations. These organisations have committed themselves to follow the advice of the IAC, unless formal jurally regulations or the height of the remaining budget makes this impossible and/or illegal.

Consequently, each funding organisation makes the final funding decision and each partner will fund its national applicants. Therefore, the national funding agencies apply their own well-established funding rules to their national/regional applicants.

5.2 Assessment criteria

The proposals (offers) that are submitted in time will be assessed according to the following criteria:

- relevance to “The call for tenders on two studies” objectives
- quality of international collaboration
- technological and scientific quality of the proposed methodology
- the scientific competence of the consortium partners
- quality of project management and co-ordination.
- foreseen implementation and exploitation of results
- resources available for the project
- the height of the price offered. This price may not exceed the national sums and the total sum as given in table 1.

All the criteria above need to be assessed positively for a positive end-score.

Beyond these instructions above, your participating national funding agency’s guidelines should be followed for the national applications. If you intend to participate in this call please contact your national contact person.

5.3 Communication of proposal evaluation decisions

The national funding agencies will communicate the proposal evaluation decisions to the respective national parties that are involved in an application.

6. Call secretariat

The secretariat of this first call/ joined assignment will be chaired by Norway, and will be attached to the Research Council of Norway. The call secretariat will undertake the administration duties of the call procedure under strict confidentiality.

Contact Call secretariat:

Research Council of Norway.

Contact: Trond Moengen, T: + 47 952 73 220

Emailaddress for submission: trm@rcn.no

7. Contact information of participating countries / National contact points

Austria

IV2Splus T-N Program;
Austrian Research Promotion Agency (FFG)
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