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D4.3.1 Local Action Plan Guide

Responsible Partner
University of Maribor

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Index

eGUTS approach to Local Action Plan development

Cities and municipalities are more and more advocating electro mobility and introducing various measures to advance its share. In order to support their efforts, especially in relation to planning, guidelines, training materials and document template were developed. The "eGUTS Local Action Plan Guide" outlines the eGUTS approach as well as contains detailed step-by-step guidelines to Local Action Plan development process together with Local Action Plan Template complemented by Training materials.

The integral parts of "eGUTS Local Action Plan Guide" are:

- Local Action Plan Terms of Reference (LAP ToR): the documents describes step-by-step methodology for LAP development;
- Local Action Plan Template (LAP Template): the template for the LAP document specifying chapters and content to be filled-in.

Supplementary to "eGUTS Local Action Plan Guide" eGUTS Training materials were developed. The training materials consist of six modules, each devoted to specific topic.
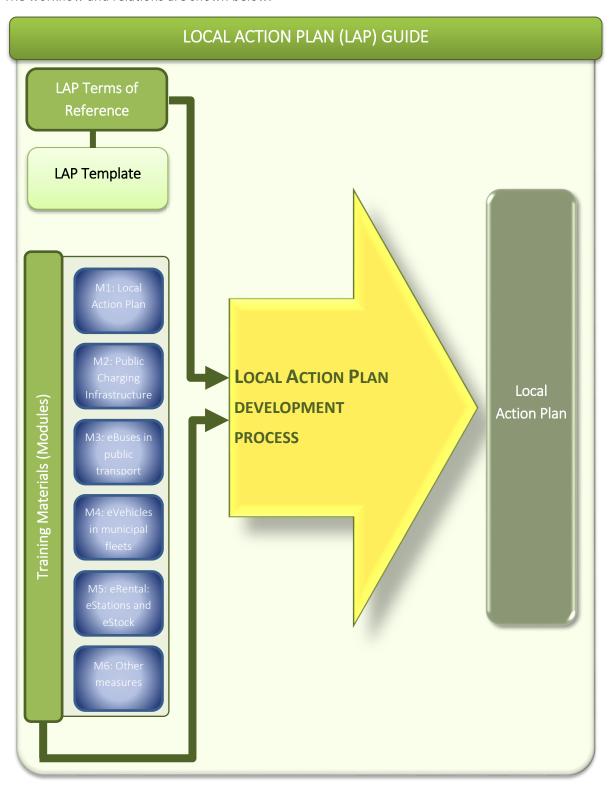
- M1: Local Action Plan (LAP development process)
- M2: Public Charging Infrastructure
- M3: eBuses in public transport
- M4: eVehicles in municipal fleets
- M5: eRental: eStations and eStock
- M6: Other measures

The eGUTS process of Local Action Plan development is comprised of following steps:

1. Study and understand **Local Action Plan Terms of Reference** (LAP ToR).
2. **Engage** stakeholders.
3. Compose a **working group** responsible for Local Action Plan development.
4. **Train the working group** (and stakeholders) using Training materials (modules 1 – 6).
5. Understand **Local Action Plan Template** (LAP Template).
6. **Review municipality's strategic documents** and identify eMobility measures/actions to be included in Local Action Plan.
7. Adapt LAP template to your needs and **insert eMobility measures** to be implemented
8. Constantly **coordinate with City Council.**
9. Hold public consultations (optional).
10. **Submit** Local action Plan to City Council.
11. City Council officially adopts Local Action Plan.
12. **Implement** Local Action Plan, **monitor implementation** and **update** the plan **periodically.**

The workflow and relations are shown below:

Local Action Plan

Policies place local plans at the heart of the planning system, so it is essential that local action plans are in place and kept up to date. Local plan sets out a vision and a framework for the future development of the area, addressing needs and opportunities in relation to specific aspects of society (mobility, housing, community facilities, infrastructure etc.) as well as a basis for safeguarding the environment and adapting to climate change.

The Local Action Plan should make clear what is intended to happen in the area over the life of the plan, where and when this will occur and how it will be delivered. This can be done by setting out specific measures to be implemented, actions to be taken, specific allocations of land for different purposes or through criteria-based policies to be taken into account when considering development.

Local Plans need to be be tailored to the needs of each area in terms of their strategy and the policies required. They should focus on the key issues that need to be addressed and be aspirational but realistic in what they propose. The Local Plan should aim to meet the objectively assessed development and infrastructure needs of the area, including unmet needs of neighbouring areas where possible.

In this respect E-mobility Local Action Plan is a structured and scheduled municipal plan to promote and advance electric mobility in municipalities. It helps municipalities to detail short- and long-term measures, assign responsibilities for actions completion and to involve key stakeholders. At its core, e-mobility local action plan is concrete implementation plan expressing commitment of a municipality to implementation of electro-mobility actions.

The main objective of the local action plan is to identify and detail specific actions to be implemented. In short local action plan deals with four major elements:

1. Specific tasks: what will be done and by whom?
2. Time horizon: when will it be done?
3. Resource allocation: what specific funds are available/needed for specific activities?
4. Monitoring: how will the progress be monitored and by whom?

Municipalities have different starting points and motivations for LAP development can be versatile therefore also the results will vary – there is no "one fits all" eMobility Local Action Plan. Local circumstances and goals should always affect the way an Action Plan turns out to be. The here described methodology for development of eMobility Local Action Plan is rather generic allowing municipalities to adapt it to local priorities and local context. To make an Action Plan binding, it should be approved in an official municipal decision making process.

In order to support cities and municipalities with eMobility Local Action Plan development, two documents have been elaborated:

1. LAP Terms of Reference (annex 1)
2. LAP Template (annex 2)

LAP Terms of Reference

The Terms of Reference (ToR) defines all aspects of how policy makers (a team established for preparation of Local Action Plan) should conduct all necessary steps/phases in order to define and prepare the eMobility Local Action Plan for the municipality. It provides a definition of the objectives, roles and responsibilities of contributors (team) and resources to be used for activities for the preparation of the eMobility Local Action Plan.

LAP Template

The eGUTS LAP Template is coherent with the LAP development process described in "Terms of Reference and it contains all elements described therein. The Template also contains short explanation of content to be specified in each chapter of the plan. The Template is a model of local action plan document but is not to be seen as rigid or fixed for it can be modified to suit the needs of each municipality. Local circumstances and goals should always affect the way an action plan turns out to be. The Template is to be used together with Terms of Reference (ToR). The Terms of Reference specifies in detail each of the chapters of a local action plan.

For further support additional training materials were developed. Short presentation of materials is given hereafter.

eMobility Training Materials

To support policy makers with eMobility Local Action Plan development, training materials on various topics were developed. These training materials provide essential insight into issues related to different aspects of eMobility in urban areas. Utilisation of the materials will enhance capabilities and competencies of policy makers to deal with eMobility issues, to understand eMobility requirements and restraints in order to prepare realistic and feasible action plans.

The Local Action Plan training materials are divided into six units dealing with different topics. The first unit deals with process of Local action Plan Development. It provides basic descriptions, terminology and explanations to ensure common understanding of the concept. The core of this unit deals with Local Action Plan - it gives a step-by-step description of Local Action Plan development together with practical examples.

Other training units consider eMobility measures that can be implemented through eMobility Local Action Plan. As list of possible measures and actions is quite extensive, the measures and actions were grouped and training materials for each group of measures were prepared. eMobility measures were grouped as follows:

- Public charging infrastructure.
- Public transport – eBuses in public transport.
- Electric vehicles in municipal fleets.
- eRental – eStations and eStock.
- Other measures:
    o parking preferences,
    o reserved lanes,
    o exemptions from restricted access.

The training material are prepared in form of e-learning materials and are self-explainable (one is able to use them without much external support). Nevertheless, within eGUTS project, trainings/workshops for each of the modules are to be organized in order to educate local action plan working group and stakeholders. For each of the workshop eGUTS partner responsible for Local Action Plan development needs to activate local/national mobility expert on each individual topic. The expert can be one of the eGUTS partners' employees, national Transnational Expert Panel (TEP) member or an external expert on the topic in question. The trainees are expected to study the module in question beforehand and to use workshops for discussions and for obtaining answers on specific questions from the expert. The workshops should be relatively short (max 3 h) and interactive – meaning that participants will be expected to study the module in question beforehand in order to enable good discussion and exchange of opinion.

Within eGUTS it is necessary to necessary to carryout workshops for all six modules. For use outside eGUTS partnership the cities decide on which modules to training should be implemented – this depends of the needs of each city. For instance if city is planning to introduce e-buses into public transport system then it should opt at least for modules "M2 Public charging infrastructure" and "M3 eBuses in public transport"

Complete training materials of all six modules are provided to policy makers and stakeholders. The access to training materials is unlimited and free[1].

Content of Training materials for each module:

Module 1: Local Action Plan

The training unit deals with following topics:

- Local Action Plan definition and terminology
- Local Action Plan development process
  - o Commitment
  - o Document review
  - o Action plan formulation
  - o LAP adoption
  - o Implementation and monitoring

Module 2: Public charging infrastructure

The training unit deals with following topics

- Charging infrastructure technologies
- Recharging time and infrastructure
- The demand and expected use
- Location/Facility planning and grid infrastructure considerations
- Community readiness
- Safety and security
- Publicity

Module 3: eBuses in public transport

The training unit deals with following topics:

- Typology of eBuses – Advantages and Disadvantages
- Infrastructure and charging requirements
- Procurement of electro buses for public fleets
- Micro-public transport systems
- Publicity

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[1] Once Training materials are done and published, link is specified here

Module 4: Electric vehicles in municipal fleets

The training unit deals with following topics:

- Types of electric vehicles (pedelecs, e-cars, e-vans, e-trucks)
- Municipal fleets to be considered
- Infrastructure and charging requirements
- Publicity

Module 5: eRental – eStations and eStock

The training unit deals with following topics:

- Pedelecs and e-bikes
- e-cars
- Rental stations
- Safety and security
- ITS support
- Publicity

Module 6: Other measures

The training unit deals with following topics in relation to e-vehicles:

- Parking preferences (fees, priority parking etc.)
- Priority lanes
- Access restrictions / low emission zones exemptions
- eTaxis (incentives and tax reliefs)
- Financial Road pricing measures
- Regional taxes