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**ECORails –
Energy efficiency and environmental criteria in the awarding of regional rail transport vehicles and services**



**Deliverable 5: Organisation of the half yearly project meetings including minutes in M6, 12, 18, 24:
Project meeting M12
(26th-27th of April 2010) in Timisoara**

Version:

1

Status:

Final

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Acronym:

ECORailS

Title:

Energy efficiency and environmental criteria in the awarding of regional rail transport vehicles and services

Distribution:

Partic N°	Participant name	Participant short name	Country code
CO	TSB Innovation Agency Berlin GmbH FAV – Transport Technology Systems Network	TSB FAV	DE
CB 2	Senate Department for Urban Development	SenStadt	DE
CB 3	Pro Rail Alliance	ApS	DE
CB 4	KCW GmbH	KCW	DE
CB 5	Berlin University of Technology	TUB	DE
CB 6	Trafikstyrelsen	TSY	DK
CB 7	Transportforskningsgruppen I Borlänge AB	TFK	SE
CB 8	Province administration of Brescia	PoB	IT
CB 9	Università Commerciale “L. Bocconi”	CBO	IT
CB 10	Università di Roma “La Sapienza”	ULS	IT
CB 11	Integral Consulting RD	IRD	RO
CB 12	CFR Timișoara – National Society of Railway Transport	CFR	RO
CB 13	Universitatea POLITEHNICA din Timișoara	PUT	RO
CB 14	Budapest University of Technology and Economics	BME	HU
CB 15	Agenzia della Lombardia Orientale per i Trasporti e la Logistica	ALOT	IT

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0 Agenda

Location:

Casa Poli II.
 Bul. Eminescu no 11
 Timisoara
 ROMANIA

Time	Topic	Responsible
26 th of April		
09:00-09:15	Welcome & Introduction	CFR, PUT, IRD, TSB FAV
09:15-10:00	WP1 Management (Project status, IR)	TSB FAV, 45 min
10:00-10:15	Coffee Break	15 min
10:15-11:15	WP5 Evaluation and Validation (PI L1, L2 and L3 measurement)	IRD, 60 min
11:15-12:15	WP6 Status GL, discussion and agreement points for the meeting	ApS, 60 min
12:15-13:15	<i>Lunch break / break</i>	
13:15-14:15	WP6 Discussion GL structure	ApS, 60 min
14:15-15:15	WP6 Discussion GL sub-chapters of chapter 2 (content scope)	ApS, 60 min
15:15-15:30	Coffee Break	15 min
15:30-16:30	WP6 Discussion GL sub-chapters of chapter 2 (content scope)	ApS, 60 min
16:30-17:30	WP6 Discussion GL sub-chapters of chapter 3 (content scope)	ApS, 60 min
17:30	End of meeting	

27th April 2010

09:00-11:00	WP6 Discussion GL sub-chapters of chapter 1 and 4	ApS, 120 min
11:00-11:15	Coffee Break	15 min
11:15-11:45	Agreement on GL structure and GL contents	TSB FAV, ApS, 30 min
11:45-12:45	<i>Lunch break / break</i>	
12:45-13:45	WP2 Technologies: Work Plan	ULS, 60 min
13:45-14:45	Discussion and agreement on relevant GL chapters for the pilot applications	ApS, 60 min
14:45-15:00	Sum-up of meeting	TSB-FAV, 15 min
15:00	End of Meeting	

1 Foreword

Due to cancelled travel connections for all partners, resulting from the closure of the European air space, the Timisoara consortium meeting originally planned for 19 – 20 April 2010 had to be postponed to the 26 – 27 April 2010. Despite all efforts to agree on a date where all consortium partners could be available, conflicting appointments for the period until end of May 2010 made it necessary to identify a date for which a majority of the partners could take place.

Since the cancellation of flights has made a reimbursement of the flight tickets possible, an additional conference call for the partners not able to participate in Timisoara has been organised on 4 May 2010. The topics have been focussed on the core topics and outcomes of the Timisoara meeting.

All agreements of the consortium meeting including the conference call had been done with exception of partner TSY who was not able to attend both, the consortium meeting on 26/27 April 2010 and the conference call on 4 May 2010.

2 Results, topics, to-do's

2.0 Presentations

No	Topic	File
1	Martin Schipper: Project Status ECORailS, Interim report	<i>01_ECORailS_WP1_Progress-ECORailS_100419_V.01</i>
2	Laura Panea: ECORailS Work Package 5 Evaluation & Validation	<i>ECORailS_WP5_W01_WP5_requirements_100308_V.01</i>
3	Dan Caraman: New Guidelines 2nd draft D20 - IRD point of view	<i>ECORailS_WP6_W01_D20_second draft_IRD point of view_100426_V.01</i>
4	Matthias Pippert: WP6 Communication and Dissemination	<i>100426_1100h_ApS_ECORailS_WP6_D20+D21</i>
5	Matthias Pippert: WP6 Actual GL status, agreement points for the test version	<i>100426_1100h_ApS_ECORailS_WP6_Telcon_V.02</i>
6	Ferdinando Stanta: WP6 from WP4	<i>WP6 from WP4</i>
7	Emilio Cosciotti: WP2 "Technologies" Work Plan	<i>ECORailS_WP2_W22_Timisoara meeting 27th of April 2010_100427_V.01</i>
8	ECORailS Brussels Event, 24th of June 2010	<i>ECORailS_WP6_A03_Brussels-Event_100217_V.02</i>

2.1 WP 1 Management (Martin Schipper, TSB-FAV)

For further information see **Presentation 1**

As presented to the project partners and the EC officer, the Guidelines will be continuously updated during the pilot applications, which are executed between M11 and M22 (March 2010 to February 2011). This positive further development of the work plan has been possible due to the establishment of a regional level of the ECORailS User Platform, where stakeholders of the four pilot sites Berlin, Øresund, Brescia/Lombardy and Timisoara are gathered.

This approach will be organised as follows:

- Basis: D20 "2nd version of the guidelines"
- Iterative process for using the Guidelines with Public Transport Administrations (PTAs) and key stakeholders
 - 4 consortium PTAs, Train Operating Companies (TOCs), Infrastructure Managers (IMs), Suppliers, others)
 - Involvement and number of stakeholders depends on the specific site framework conditions and needs
- Pilot applications: process for testing and improving the Guidelines for the right structure, contents, effects and manageability
- Formulation of legally compliant text parts to be integrated into real life awarding texts

The workshop process will be organised by the following steps, following the management plan established in D12:

		2009		2010												2011	
		December	January	February	March	April	May	June	July	August	September	October	November	December	January	February	
		15	31	15	31	15	31	15	31	15	31	15	31	15	31	15	31
Task 1	Common Pilot Applications Management				D12												
Task 2	Preparation of the Pilot incl. test methodology					D13											
Task 3	Execution of the tests																D14
	Step 1 Preparation																
	Step 2 Scenarios																
	Step 3 Execution																
	Step 4 Analysis of the results																

ISR: Intermediate Site Reports

The end of the “Step 1 Preparation” phase of WP\$ could be postponed due to the new agreed schedule for the delivering of D20.

Furthermore, the status of the Performance Targets has been shown. The achievements for the period M1-12 (May 2009 to April 2010) are as follows:

Status of Performance targets

- **Level 1: Quantitative energy and CO2 emission savings**
 - 5% in comparison to current awarding
 - 10% with regard to the currently used rolling stock
 - In the long term: System-wide improvement of energy efficiency for regional railway by 15% by 2020
- **Level 2: Manageability of the Guidelines**
 - (12) 14 interviews/written questionnaires with PTAs/TOCs from 6 countries ✓
 - 4 agreements with PTAs on the energy efficiency and CO2 targets
- **Level 3: Scope of dissemination**
 - User Platform: (10) 18 PTA's and (10) 12 TOC's from 5 different countries ✓
 - Dissemination events: (20) 18 PTA's and (20) 12 TOC's from (8) 8 different countries; (5) 5 vehicle suppliers

BASILINE DEFINITION

END OF PROJECT

Another topic has been the improvements asked by the coordinator to all consortium partners:

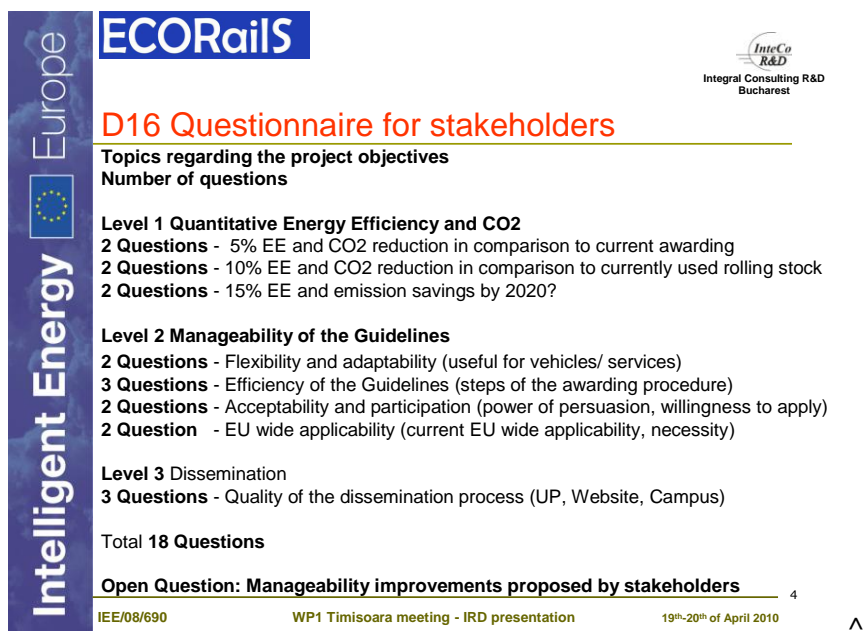
- Minutes/Presentations are (heavily) delayed or missing
 - ⇒ Contingency dates were agreed in the meeting up to when all documents should be available
- Communication:
 - ⇒ Please avoid overloaded contents and unnecessary communication
 - ⇒ All relevant partners should be informed about agreements/consultations
- Give feedback to your dissemination activities (Dissemination Database)

Finally, the contributions for the Interim Report, covering the period M1-13, have been presented (**see Annex III**). Emails requesting the input have been already sent out on the 23rd of March 2010 (financial contributions) and on the 11th of April 2010 (technical contributions).

The deadline for the Interim Reporting is 11 June 2010.

2.2 WP 5 Evaluation and Validation (Laura Panea, IRD)

For further information see **Presentation 2**



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D16 Questionnaire for stakeholders

Topics regarding the project objectives
Number of questions

Level 1 Quantitative Energy Efficiency and CO2
2 Questions - 5% EE and CO2 reduction in comparison to current awarding
2 Questions - 10% EE and CO2 reduction in comparison to currently used rolling stock
2 Questions - 15% EE and emission savings by 2020?

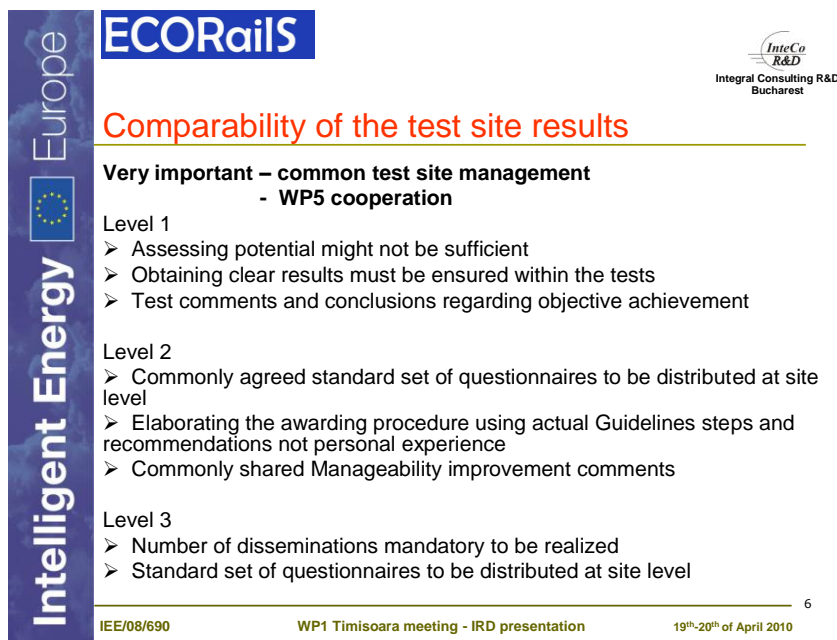
Level 2 Manageability of the Guidelines
2 Questions - Flexibility and adaptability (useful for vehicles/ services)
3 Questions - Efficiency of the Guidelines (steps of the awarding procedure)
2 Questions - Acceptability and participation (power of persuasion, willingness to apply)
2 Question - EU wide applicability (current EU wide applicability, necessity)

Level 3 Dissemination
3 Questions - Quality of the dissemination process (UP, Website, Campus)

Total 18 Questions

Open Question: Manageability improvements proposed by stakeholders

IEE/08/690 WP1 Timisoara meeting - IRD presentation 19th-20th of April 2010



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Comparability of the test site results

**Very important – common test site management
- WP5 cooperation**

Level 1

- Assessing potential might not be sufficient
- Obtaining clear results must be ensured within the tests
- Test comments and conclusions regarding objective achievement

Level 2

- Commonly agreed standard set of questionnaires to be distributed at site level
- Elaborating the awarding procedure using actual Guidelines steps and recommendations not personal experience
- Commonly shared Manageability improvement comments

Level 3

- Number of disseminations mandatory to be realized
- Standard set of questionnaires to be distributed at site level

IEE/08/690 WP1 Timisoara meeting - IRD presentation 19th-20th of April 2010

2.3 WP 6 Communication and Dissemination

2.3.1 New Guidelines 2nd draft D20 - IRD point of view (Dan Caraman, IRD)

For further information see **Presentation 3**

2.3.2 Status of the Guidelines, Discussion of the Guidelines' Structure and the content of chapters (Matthias Pippert, ApS)

For further information see **Presentations 4, 5 and 6**

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New approach of the GL

In Bergamo we decided to structure the GL as strictly as possible to a typical award procedure and present the content in four levels:

1. Introduction
2. Overview: phases of awarding and inclusion of EE/ENV aspects
 - 2.1 / 2.2: diagrams
 - 2.3: Description of the process
3. Issues to be considered in phases S (“Strategy”) and A (“Preparation”)
4. Detailed description of criteria, including legal aspects
5. Conclusion, further steps and open questions

Annex

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1st level: Chart with 6 (7?) phases of awarding, actions by PTA and steps for including EE/ENV criteria

2nd level: Description of the process with references to further information (in the GL)

3rd level: Clear description of the single criteria and technologies/operational measures

4th level: Additional background information (Annex and/or Campus ECORails, Links)

- The proposal for amending the Guideline’s structure with the four levels of description has been agreed.
- Chapter 1 will be an introduction on the targets of the ECORails project.
- Chapter 2 will include an Introduction of the Guidelines users’ needs:
 - ⇒ A detailed description of awarding procedures is not needed by the PTAs, that means only the basics need to be described.
 - ⇒ The technologies and the targets are the main remaining problems for the PTAs.
 - ⇒ The awareness building process has to be designed to start strategically and to continue tactically (practical information to the PTAs).
 - ⇒ The PTAs have to be advised in setting realistic goals. It is necessary to give good references, e.g. TecRec (Common Technical Recommendations of UIC/UNIFE)
 - ⇒ The PTAs need not to know how LCC works but they need arguments for the necessity of LCC data collection. Data and potentials have to be provided in a wide range. ECORails should discuss only some costs, not all.

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<h1>6 or 7 phases?</h1>			
Main phases at PTA:		Main associated actions at PTA:	
Competitive Awarding	Direct Awarding	Competitive Awarding	Direct Awarding
A. Preparation		A. Identification of needs & options (e.g. baseline & scenario calculations)	
B. Elaboration		B. Preparation of ITT/direct contract text plus planning of phases D-E	
C. Response to tender	C. + D. + E.	C. None (bidding operators to work)	C. + D. + E.
D. Evaluation and awarding		D. Evaluation, decision and justification	
E. Negotiations		E. Further negotiations and specifications; preparation of the contract	
F. Preparation of contract period		F. Verification of performance with selected operator	
G. Follow up during the contract period		G. Monitoring and bonus/penalty awards on annual basis	
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		4	

Following aspects regarding the awarding phases (see above) have been discussed and finally agreed:

- The phase “E: Negotiations” is not mandatory because of different legal situations in the member countries.
- The phases “C: Response to tender”, “D: Evaluation and awarding”, and “E: Negotiations” can be merged for the cases of direct awarding and in-house providing.
- “In-house providing” should be defined as an own type of awarding process beside “Direct awarding” and “Competitive awarding”.



Advantages / disadvantages of different types of awarding procedures

Advantages / disadvantages of competitive tendering, direct award to own TOC, direct award to 3rd party/incumbent TOC (in terms of EE/ENV criteria)?

Competitive tendering

Pro:

- Functional approach
- Open for ideas of bidders
- Problems with one criterion may be outweighed by good result with other criterion

Contra:

- Certain inflexibility
- Results difficult to forecast
- Restricted timeframe

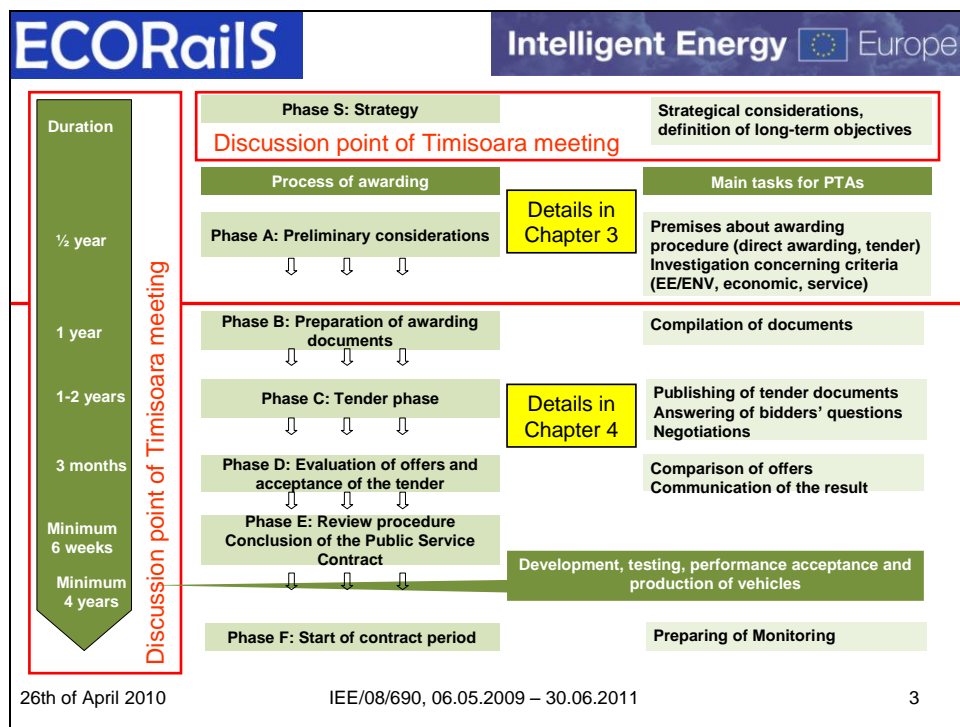
Direct awarding

Pro:

- Results may better fit to specific situation
- Flexibility, to certain extent even after signing the contract
- Innovations with mid- or long-term implementation time are feasible.

Contra:

- Result depends on bargaining power of PTA
- External (better) ideas may be ignored



Following aspects regarding the phase diagram (see above) have been discussed and finally agreed:

- The duration column should be skipped.
- The proposed additional phase S (Strategy) should not be integral part of the awarding process due to the possibility for clarification of longer-term issues (e.g. technology potentials or testing of prototypes).

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Timeframe for innovation / timeframe for tenders?

TOC and manufacturers cannot appropriately respond to ambitious ENV/EE criteria if the duration of the tender is too short and the criteria themselves are "surprises".

Proposed solutions (to be discussed in the GL, chapter 3):

- Recommend sufficient timeframe?
- Public announcements about ENV/EE criteria well in advance
- Clear environmental strategy
- Coordinated action with other PTAs
- Incentives instead of requirements?
- "Postponed" requirements?
- Incentives for later modernisation?

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- It has been agreed that the timeframe for innovation must not have an influence to the timeframe for tenders. That means longer timeframes for introduction of innovations must not lead to longer timeframes for awarding procedures.

- Because of ECORails project aims in boosting of innovation process and systematic inclusion of ENV/EE criteria a careful wording regarding the timeframe is needed.
- A strategic approach is more promising but ECORails must also immediately be applicable for already existing technologies.

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Modernisation ↔ authorisation?

It is a problem when modernisation is required (explicitly or implicitly) for ENV/EE reasons. The problems are:

- Remaining lifetime / residual values of old rolling stock
- Small series, individual solutions
- New authorisation, especially if cross-acceptance does not work

How to discuss in the GL (chapter 3)?

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- Technologies with possible additional effort for authorisation should be identified as a warning for PTAs
- In general more functional requirements should be foreseen.
- The GL must allow the PTAs to have realistic expectations about the energy saving potential of certain technologies.

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Recommendations for requirements, weighting, etc.?


Proposal: For every criterion we may provide recommendations about its use:

	Recommended	To be considered under certain circumstances	Not recommended
Monitoring of energy consumption			
Requirement	X		
Optional (weighting)		X	
Bonus / malus		X	

	Recommended	To be considered under certain circumstances	Not recommended
Specific energy consumption to be reduced by 20 % compared to current situation			
Requirement			X
Optional (weighting)		X	
Bonus / malus		X	

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- If requiring a direct indicator a monitoring system will be mandatory.
- It is not necessary to describe the law, but simple connections between the chosen technology and the consequences.
- It has been discussed to prepare a decision tree. A first version of such a decision tool will be provided by partner ApS for the GL test version.

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Can ENV/EE criteria hinder rail access liberalisation?

To be discussed in context of D 10 / WP 3 results

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Issues in phase B („Elaboration “)

Chapter 2.3.3

- *Type of contract*
- *Type of operation*
- *Ways to include EE/ENV criteria*
- *Monitoring energy consumption*
- *Direct performance indicators*
- *Indirect performance indicators*
- *Financial and economical benefits*
- *Features and equipment ... (energy recovery etc.)*
- *Stand-by and comfort functions*

- *Energy-efficient driving and driver training*
- *Further operational measures*
- *Noise emissions*
- *Pollutants*
- *Review of selection of criteria, prioritisation, weighting*
- *Final definition of weighting scheme*

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Timeframe until 31st May


11th May	2nd chapter and parts of 3rd chapter
22nd May	Rest of 3rd chapter, 4th&5th chapter
27th May	Deadline for feedback
31st May	Final version D 20

Please send feedback step by step, if possible!

Please focus feedback on structure, steps of awarding, main content and basic facts. Wording and details can be improved later on.

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- additional deadline for the rest of chapter 3: **19 May 2010**

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Contributions from partners

WP 2 - “expertise on demand”,
- checking appropriateness, esp. ch. 2.3, 4
- if appropriate split-up of mid-term technologies (or for D 22)

WP 3 - “expertise on demand”, esp. chapter 4
(text modules, recommendations about requirements etc.

WP 4 - TSY, SenStadt, TFK: Is the text appropriate for competitive tendering?
- A LOT, TFK: Is the text appropriate for direct awarding?
- IRD, TFK: Is the text appropriate for procurement of rolling stock?

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Revision of D20 Structure:

Chapter 2:

- Inclusion of a flowchart into the phase diagram has been discussed.

Chapter 3:

- All bullet points are relevant, no one is missing
- Merging and sequencing of some bullet points (3, 4, 5, 6) has been discussed.
- Bullet points 1, 2, 7 are agreed.
- The structure of chapter 3 will be discussed again when the text is available.

- Chapter 3 should be short (max. 6 pages). **Very important warnings to the PTAs must be included.**

Chapter 4:

- Content agreed.

Chapter 5:

- short abstract of potentials which have been identified in the pilot applications
- outlook of factors should be included to make railways more sustainable
- list of references

Reviewers group: Ferdinando Stanta, Dan Caraman, Martin Schipper

Working and reviewing process after 31 May 2010:

- week 22/2010 D20 update provided by Matthias Pippert, to be send to IRD
- 15 June 2010 provide the evaluation of the 5 additional technologies by ULS
- week 24/2010 evaluation by TFK

2.4 WP 2: Technologies

- *For further information see **Presentation 7***

2.5 WP 6: Dissemination Activities (Martin Schipper, TSB-FAV)

- *For the planned agenda of the Brussels dissemination event please see **Presentation 8***



ECORailS Dissemination Events: Brussels 2

- Use of the technological potentials for energy efficiency and environmental friendliness in the real-life awarding of Regional Rail Transport:
 - Showing the potentials for decreasing public budget expenditures by demanding ambitious energy and environmental standards
 - Showing the potentials on the basis of the current European and national legal framework
- Needs for further political and legal initiatives at the European level



ECORails Dissemination Events: Brussels 3

- Location: Berlin Representation
 - Evening reception on 23rd of June
- External speakers addressed: EC – EACI, DG TREN; UITP, CER, UIC, UNIFE; Brussels representation Siemens, Bombardier, Alstom; Railenergy
- Discussion / presentation topics: By 14th of May
- Invitations to participants: By 30th of April
 - Target groups: PTAs, TOCs, IMs; Suppliers
 - Invitation draft emails have been sent to you
 - Official invitation by Berlin Senate for Urban Development, ApS and TSB FAV – post addresses needed

Annex I: Updated Guidelines structure

(status: 14 May 2010)

1. Introduction

2. Reference model of awarding and inclusion of EE/ENV aspects

2.1 Reference model of awarding

2.2 Phases of awarding and inclusion of EE/ENV aspects

2.3 EE/ENV issues during the awarding process (overview)

2.3.1 Strategy

2.3.2 Phase A – Preparation

2.3.3 Phase B – Elaboration

2.3.4 Phases C to E – Response to tender/quote request, Evaluation and awarding, Negotiations

2.3.5 Phases F and G - Preparation of contract period, follow up during the contract period

3. EE/ENV issues to be considered for the strategy and phase A "Preparation" (detailed description)

- *Political and economical relevance of saving energy and environmental criteria in passenger rail transport*
- *EU immission law: Environmental Noise Directive and Air Quality Directive*
- *Decisions of PTA which could influence energy efficiency and environmental performance of rail passenger services*
- *European law relevant for awarding and tendering*
- *Different methods of awarding services and vehicles by the PTA*
- *Timeframe of awarding and EE/ENV criteria*
- *How to charge energy costs*
- *Energy efficiency: State of the art, economic aspects, present and foreseen trends*
- *European and national regulations concerning noise and pollutants of railway rolling stock*
- *Noise and pollutants: State of the art, economic aspects, present and foreseen trends*
- *Good-practice examples*

4. Detailed description of criteria, including legal aspects

4.1 General comments on the use of the described criteria

- 4.2 Application to different types of contracts
- 4.3 Application to different types of operation
- 4.4 How to include, assess and monitor EE/ENV criteria (requirements, weighting, bonus/malus, incentives/penalties, modernisation paths/phasing out, etc.)
- 4.5 Direct performance indicators (traction energy consumption)
- 4.6 Indirect performance indicators
- 4.7 Specific indicators
- 4.8 Identification of financial and economical benefits
- 4.9 Features and equipment of the vehicles to be used (energy recovery etc.)
- 4.10 Stand-by and comfort functions
- 4.11 Energy-efficient driving and driver training
- 4.12 Further operational measures
- 4.13 Review of selected criteria

5. Conclusion, further steps and open questions

Content of Annex

Glossary

Abbreviations

Bibliography

Annex II: Press release for the ECORailS Consortium Meeting

Start of the Guidelines pilot tests for green railway awarding on 1st of March 2010 together with over 50 European railway stakeholders

The EU project ECORailS („Energy efficiency and environmental criteria in the awarding of regional rail transport vehicles and services“; duration 2009-2011) aims to the inclusion of environmental criteria by Public Transport Administrations for Regional Rail Passenger Transport. The project elaborates Guidelines as decision support for the involvement of energy efficiency improvements, noise and Green House Gases/exhaust gas reductions into regional awarding. Parts of the Guidelines, developed by a project consortium of 14 partners from six European countries (coordination by TSB-FAV), are among others a catalogue of energy efficient technologies and operational measures, as well as legally secure text modules for the energy efficient and environmentally friendly tendering and procurement of passenger transport.

The Guidelines are tested in four European regions (Berlin-Brandenburg, Øresund, Lombardy, Timisoara), which are exemplary for the different European situations in Regional Rail Passenger Transport. Altogether 50 target group and key actors of the project from Public Transport Administrations, Train Operating Companies, Infrastructure Managers and Suppliers, identify the different requirements, needs and expectations on environmental-related awarding. Among these were different national and regional ministries, and international associations such as UIC – International Union of Railways, UITP – International Association of Public Transport and the CER – Community of European Railway and Infrastructure Companies.

Furthermore, the stakeholders evaluate the project results and the European-wide applicability of the Guidelines. One of the key ECORailS objectives is the achievement of a system-wide reduction of 15 % until 2020 both for energy consumption and CO2 emissions.

On 1st of March 2010, the pilot applications started at the four regional sites. In the first site workshops during March the different expectations on the Guidelines have been formulated. A first result was the identification of common requirements which are needed to be fulfilled for green awarding. In particular the different actors agreed on the main awarding phases on which the Guidelines to be targeted, namely the preparation of the awarding and the related consultation of parties issuing an awarding offer, for the formulation of offers, as well as for the monitoring during the contract duration. All results of the pilot applications will flow into the final Guidelines (provided in April 2011).

The ECORailS consortium consists of the following partners:

1. TSB Innovation Agency Berlin GmbH FAV – Transport Technology Systems Network – Germany (coordinator)
2. Senate Department for Urban Development - Germany
3. Pro Rail Alliance - Germany
4. KCW GmbH - Germany
5. Berlin University of Technology - Germany
6. Trafikstyrelsen - Denmark
7. Transportforskningsgruppen I Borlänge AB - Sweden
8. Province administration of Brescia - Italy

9. Università Commerciale "L. Bocconi" - Italy
10. Università di Roma "La Sapienza" - Italy
11. Integral Consulting RD - Romania
12. Universitatea POLITEHNICA din Timisoara - Romania
13. CFR Timisoara – National Society of Railway Transport - Romania
14. Budapest University of Technology and Economics - Hungary

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Annex III: Interim Report content (to be contributed by 11th of June 2010)

1. Interim Report Summary **(2-3 pages)**
 - 1.1 Objectives of the interim period
 - 1.2 Achieved results and lessons learnt until the interim data
 - 1.3 Identified problems and corrective actions taken in the period
 - 1.4 Main activities until the end of the action
 2. Consortium management in the period **(1-2 pages)**
 3. Progress of work plan and achievements until the interim date **(max. 10-12 pages in total)**
 - 3.1 Progress and achieved results per work package against initial objectives (3.1.1. – 3.1.6: Work Package 2 – Work Package 7)
 - 3.2 Deviations from the project work plan (3.2.1. – 3.2.7: Work Package 1 – Work Package 7)
 - 3.3 Interim review deliverables (3.3.1. – 3.3.7: Work Package 1 – Work Package 7)
 - 3.4 Interim review of performance indicators
 4. Work plan for the next period **(2-3 pages)**
 - 4.1 Planned activities in the next period
 - 4.2 Planned meetings and dissemination activities
 5. Other issues **(0-1 page)**
- Appendices to the Interim Report
- Table 1: First/updated list of submitted deliverables since starting date
 - Table 2: First/updated indicative state of advancement of hours spent (in %) since starting date per partner and per work package
 - Table 3: Updated list of main persons in charge of the action
 - Updated version of the publishable summary slides and project fact sheet
 - Copy of the deliverables produced during the reporting period

Appendices to the Interim Report

- For "actual achievement" you indicate the hours that you and your partners have *actually spent* on the respective work package from the beginning of the work package until the end of the reporting period.
- For "planned achievement" you indicate the hours that you had *planned to spend* on the respective work package from the beginning of the work package until the end of the reporting period.
- Of course, your "planning" needs to be in line with the tasks and the efforts stipulated in the work programme (Annex I) and in the budget (Annex II).
- **Delivery date 11th of June 2010!**

Work package	Actual/Planned Achievement	Total Partners	Partner 1	Partner 2	Partner 3
WP 1: Management	Actual Planned	% %	% %	% %	% %	
WP 2: Technologies	Actual Planned	% %	% %	% %	% %	
WP 3: Legal frames and awarding procedures	Actual Planned	% %	% %	% %	% %	
WP 4: Pilot applications	Actual Planned					
WP 5: Evaluation and Validation	Actual Planned					
WP 6: Communication and Dissemination	Actual Planned					
WP 7: IEE Dissemination Activities	Actual Planned					
Total Action		% %	% %	% %	% %	

- Covering the Period M1-13 (May 2009-May 2010)
- Email with basic explanations template in the next week (22nd-26th of March 2010)
- Time for questions until Timisoara (19th-20th of April 2010)
- **Provision of financial statement: By 11th of June 2010!**

SUMMARY OF ALLOWABLE COSTS

For the period from (dd/mm/yy) to (dd/mm/yy) and corresponding to the contractual dates.

Agreement number: 06-0033-06/09/Agency Indirect costs rate: 60%

Project acronym: 0

Name of the beneficiary: 0

My organisation can not claim the VAT back (checkbox used in this financial statement)

Always use the same currency as in your accounting system. Beneficiaries outside the Euro area must use their national currency. If your country uses the EURO during the action, please submit two financial statements (one in national currency and the other in EURO), and one in EURO for the period thereafter. Please note that when incurring incurred costs in another currency than Euro, you also need to transfer the budget (which is always in Euro in the Agreement) to your national currency. You can use an exchange rate that was announced on the 1st day of the month following the end date of the reporting period (e.g. exchange rates from the euro website - <http://ec.europa.eu/euro/finance/>).

Contact person for this financial statement:
 Telephone (incl. country code):
 Fax (incl. country code):
 e-mail address:

ELIGIBLE COSTS:	Amounts in currency units		
	Budgeted eligible costs for the complete action	Costs incurred for the period	Variance
Direct costs			
1. Staff		27.533,00	-27.533,00
2. Subcontracting		0,00	0,00
3. Travel and subsistence expenses		0,00	0,00
4. Durable equipment		0,00	0,00
5. Other specific costs		0,00	0,00
Indirect costs	0,00	27.533,00	-27.533,00
Total	0,00	27.533,00	-27.533,00

REVENUE:	Amounts in currency units		
	Budgeted revenue for the complete action	Actual revenue for the period	Variance
IEE contribution %			
Other revenue			
1. Revenue from the programme and own funding	0,00	0,00	0,00
2. Revenue from other than IEE programme and own funding	0,00	27.533,00	-27.533,00
Total	0,00	27.533,00	-27.533,00

19th of April 2010

IEE/08/690

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Annex IV: Participants list

1	Università di Roma "La Sapienza	ULS	Cosciotti	Emilo
2	Politehnica University of Timisoara	PUT	Mocuta	Georgeta Emilia
3	Politehnica University of Timisoara	PUT	Ostoia	Daniel
4	TSB Innovation Agency Berlin GmbH FAV - Transport Technology Systems Network	TSB FAV	Schipper	Martin
5	TSB Innovation Agency Berlin GmbH FAV - Transport Technology Systems Network	TSB FAV	Hübner	Lutz
6	Pro Rail Alliance	ApS	Pippert	Matthias
7	Province administration of Brescia / ALOT	PoB / ALOT	Stanta	Ferdinando
8	Università Commerciale "L. Bocconi	CBO	Vaghi	Carlo
9	Integral Consulting RD	IRD	Caraman	Dan
10	Integral Consulting RD	IRD	Catrina	Aurelia
11	Integral Consulting RD	IRD	Panea	Laura
12	CFR	CFR	Virgil	Ilie
13	CFR	CFR	Rosca	Ciprian