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Pilot Actions' guidelines

Common Guidelines for Pilot Actions

Version 1

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A. INTRODUCTION

This document represents D.2.1.1 "Guidelines for pilot actions implementation" and is part of Activity 2.1 "Definition of a common framework for the pilot actions implementation", within the WP2, "Ground testing and validation of the joint strategy and action plan".

In fact, its purpose is to provide the involved municipalities (Bergamo, Klis and Szombathely) with the necessary elements to implement the pilot action on their territories in a homogeneous and uniform manner. Despite always considering the specificities of each context, the fact of providing common guidelines for the implementation will support the possibility of comparing results, of working in a coordinated manner and of increasing the impact of the activities.

The results of the pilot action will therefore be comparable and will form a comprehensive basis for policy recommendations and for the future sustainability of the solution implemented.

The document is articulated in different sections providing all the necessary elements for the municipalities and the supporting organizations to implement the pilot action and to guide them through the implementing period, until My 2026. CGM, who has elaborated this document, will provide constant support to the implementing partners in the case of any additional explanation or information needed.

The document is organized in 10 sections (including the introduction) whose contents are:

Section 2: provides and overview of the social services which are offered to the citizens by the three involved municipalities, Bergamo (IT), Klis (HR) and Szombathely (HU) which have already been described in detail in D 1.2.2 Baseline Analysis:

Section 3: provides some strategic recommendations on how to maximize the usefulness of having a Mobility Manager in the project team in each municipality as well as some indications on which elements to consider when choosing a mobility technological solution for the delivery of the social services, described in more detail in D 1.2.3 Joint Strategy and Action Plan.

Section 4: provides and introduction of the KPIs that will be used to evaluate the pilot actions, described in detail in D 2.1.2 "Pilot Actions KPIs".

Section 5: suggests some strategies for the future sustainability of the pilot actions from an economic point of view. Its intent is to support municipalities in building a solution that provides, since the beginning, the necessary elements for their future persistence.

Section 6: provides a comprehensive review of the communication tools, strategies and actions that can be put in place to maximize the impact of pilot actions on citizens, final beneficiaries and stakeholders, with dedicated suggestions for each municipality.

Section 7: offers a comprehensive overview of the strategies, tools and activities to be implemented for stakeholders' engagement both at project level and at municipal level.

Section 8: provides the first annexes which represent two templates for agreements, the first one with social services providers and the second one with sustainable vehicle providers, to ensure that a legal framework supports the collaborative activities within the implementation of pilot actions.

Section 9: gathers indications to manage the investments planned in the project according to the Programme requirements and to the local procedures.

Section 10: offers a logical flowchart to guide the different phases of the pilot actions implementation.

B. PILOT ACTIONS DESCRIPTION PER LOCATION

This section provides a brief overview of the social services offered by the municipalities to the final beneficiaries on their territories and delivered through agreements with social services or social enterprises. For a full description of each service, kindly refer to the D 1.2.2 Baseline Analysis.

BERGAMO MUNICIPALITY

Service 1: Social Transport for People with Disabilities by Partnership of Bodies

Social Service Brief Description

Social Transport for People with Disabilities - Aiding families to ensure the social integration of their

relatives.

The service includes accompanying people with disabilities from their residences to various services within the Municipality of Bergamo. Service is carried out by volunteers who work every day from 7:00 AM to 6:00

Territorial Characteristics: The transports take place within the City of Bergamo, involving urban traffic with high traffic volumes at certain times (which unfortunately largely coincide with the transportation needs). This results in delays and the need for careful planning of the transport to optimize the needs of the passengers and manage costs effectively. Therefore, extreme attention is dedicated to the planning of daily routes.

Organization of the service

Two kinds of service for people with disabilities:

- Daily and consistent service: Accompanying disabled people to services and projects (activities part of their Life Project).
- Occasional service: Activated upon request for accompaniment to medical visits or specialist facilities.

Activation Methods:

Service is activated upon request from families, social workers from the department of the Municipality of Bergamo, or the housing/community services.

For transportation of people with severe disabilities, transportation to the service is scheduled year-round at specific times and with a predetermined itinerary. During the summer, scheduling is adjusted to accommodate outdoor activities associated with the services/projects. Two vans are assigned to the Città Leggera housing network.

Services are organized based on requests and are available from Monday to Friday, from 7:00 AM to 6:00 PM. Shifts are arranged according to the availability of volunteers. On certain routes, given the sensitivity of the individuals and the complexities involved, the service is managed by a hired operator. In any case, complete coverage of the service has always been ensured.

Constraints

For people with medium-mild disabilities, their families are expected to cover 70 % of the costs of the service. For people with severe disabilities, the costs are covered by the Municipality and Consorzio Solco.

The cost of each route for families is fixed.

There are no night or festive services, except for accompaniment during the summer holidays.
It guarantees the use of means with lift for wheelchair users and accessible for elderly people with mobility difficulties

Expected improvements

- Increase the presence of volunteers with research campaigns on social media and media.
- Hybrid/electric vehicle fleet.
- Adoption of a digital detection system for transport time monitoring.

Service 2: Day Centre for people with disabilities (C.D.D.) of the City of Bergamo

Social Service brief description

The Day Centre for people with disabilities (C.D.D.) of the City of Bergamo is a service for severely disabled people who need continuous and specific assistance. The Centre is organized in such a way to ensure high level educational, social and health interventions and rehabilitation, able to build integrated paths between the different professional figures to realize effective and efficient individualized projects.

The C.D.D. guarantees, from 9 am to 4 pm, from Monday to Friday, for 235 days a year, the provision of services to guests on the basis of the Individualized Educational Project (P.E.I.), which involves families and is characterized by the opening to the outside, in an integration with the resources present on the territory.

Among the many opportunities offered to users is the daily transport service from 7.45am to 9.00am Home/ C.D.D. and from 4pm to 5.15pm C.D.D./ Home, after the ordinary frequency at the C.D.D. from 9.00 to 4pm.

Organization of the service

The disabled transport service is carried out with four suitable, approved and licensed, according to current regulations for public transport of disabled people, including in wheelchairs, vans. The vans comply with European standards.

The service includes transportation from the guest's home to the C.D.D. and vice versa, respecting the agreed and scheduled times and modalities.

Days and times of service provision: The service is carried out 5 days a week from 7.45 am to 9 am and from 4 pm to 5.15 pm, excluding Saturday and Sunday, public holidays, as well as short periods of suspension of activities by the C.D.D.
How the shifts and movements of operators are organised (what criteria are followed in assigning users to individual operators and in defining the movements of operators from one user to another): The transport service is carried out in the City of Bergamo with functional routes, appropriately articulated and organized according to the needs of users and C.D.D. and the overall functional management of transported people (also based on the total number of wheelchairs to be transported), taking into account their respective residences and the territorial location, with the time and the modalities agreed. Four vans are used for the transport service, each of which is equipped with a driver and an assistant to users during the transport. Each of the four vans operates in a specific area of the City of Bergamo with functional and homogeneous routes compared to the area of residence of users.

Constraints

Constraints of service:

- Is a service that involves public procurement: yes
- Is the service entirely at the expense of the body or is there also an economic participation by users? If yes, in what %: the monthly frequency fee of the user at the C.D.D. includes, in addition to participation in the various activities provided annually in the program of the C.D.D. (social and health activities with a high degree of integration, rehabilitation, socio-rehabilitation, educational and recreational) and the canteen service, also the transport service.

The attendance fee covers part of the social assistance costs on a monthly basis and in relation to economic situation, as defined by ISEE (individual of the adult attending the C.D.D. and not of the family; family ISEE only in case of minor person), according to proportionality parameters.

Expected improvements

To optimize and harmonize the routes of the transport service according to the needs of users and C.D.D. and the overall functional management of people transported (also based on the total number of wheelchairs to be carried), considering their respective residences and geographical location.

KLIS MUNICIPALITY

Service: Household assistance and meal delivery services

Social Service Brief Description

The municipality provides household assistance services and meal delivery services for socially disadvantaged residents. The service provider is a local self-government unit. The service users are more than 50 elderly and infirm citizens, living on the territory of the municipality. 9 women between the ages of 40 and 60 are employed to provide domestic help services, covering their movements by foot or using personal vehicles.

Organization of the service

Every woman who is employed in the field of providing social services has an average of 6 beneficiaries that she visits.

Working hours are from Monday to Friday from 7:30 a.m. to 3:30 p.m.

The exact time of service provision is agreed with the service user.

The average transfer time from one beneficiary to another is approximately half an hour. The time spent with beneficiary also depends on the day or the situation, for example the tour of the disabled takes longer than other tours.

Social services providers use personal vehicles.

The distance from one beneficiary to another is approximately 15 km.

All employees have a tour diary and records of working hours.

Female employees perform various tasks, from picking up groceries to helping around the house, paying bills, etc.

They use google maps to locate users.

Constraints

The service is paid for exclusively by the institution.

The criterion for calculating compensation is exclusively working hours.

Services are not provided at night, on holidays or on weekends.

Beneficiaries are always serviced by the same operators.

The vehicles will be used to provide help at home and for food delivery services to needy beneficiaries.

Vehicles

Operators use petrol and diesel vehicles and public transport (bus).

Expected improvements

Mobility management is an approach to service creation and delivery that starts and ends with the user. However, despite its recognition in the tourist market, the municipality's traffic accessibility is limited primarily due to its location, relief, but also the degree of development of certain forms of transport, nevertheless proposals for improving the transport system are being worked on, which would affect transport connectivity.

SZOMBATHELY MUNICIPALITY

Service: Day care for the elderly by Pálos

Social Service Brief Description

Type of service: Home care

Type of provider: Social enterprise

Type of users: Elderly individuals who are unable to care for themselves at home, either living alone or whose family members are unable to care for them.

Number of users in charge of the service: In 2023, a total of 409 elderly individuals received the service, with 387 in Szombathely city and 22 in surrounding 7 municipalities.

N° of operators employed in the service: 44 caregivers

Operator characteristics:

- **Average age**: 45-50
- **Gender**: 42 female, 2 male
- **Professional qualification**: The majority of caregivers have qualifications in social care and nursing, but there are also those with general nursing, assistant and specialized nursing qualifications.

Vehicles used for the movement of operators:

- **Which ones**: Bicycles, personal cars
- **How many**:
  - 21 caregivers use bicycles
  - 8 caregivers are permitted to use their own cars
  - 10 caregivers do not use any vehicles for their work
- **Owned by**: Bicycles provided by the employer, personal cars owned by caregivers (permitted for use as needed)

Characteristics of the territory:

- **Roads**: The caregivers mostly move in the city where the roads and biking routes are a little above average quality. The city is relatively flat so it's easy to move around with any type of vehicle. Outside the city the caregivers must use cars because of the distance and the lack of bicycle instastructure in most directions.

Territorial morphology: Szombathely and 7 surrounding municipalities

Organization of the service

Days and times of service provision:

- Service is provided daily, including weekends and holidays for some. The care is provided as needed, sometimes two to three times daily for certain individuals due to poor health conditions.

How shifts and operator movements are organized:

- Caregivers are assigned to users based on the need for care, with some users requiring multiple visits per day. 17 users required simultaneous care from two caregivers due to immobility or severe health conditions. Once they took care of one patient, they move on to the next.

- Caregivers work according to a daily schedule, which the supervisors of the care zones try to prepare 1-2 weeks in advance.

Average number of users taken care of per operator:

- On average, each caregiver provides care to 7 elderly individuals per day.

Average time spent by operators at users' homes:

- This mostly depends on the activities to be performed, but typically they spend between 15 and 60 minutes with each person. They do not spend this time exclusively at the person's home, as they also go shopping, pick up medications, etc.

Average time operators move from one user to another:

- It depends partly on how the caregiver travels. For longer distances, caregivers who drive go to the client to save time on transportation. It also depends on the distance between clients' residences. Caregiver schedules are arranged so they can ideally care for a specific area (especially for those who travel by foot or bicycle). Sometimes, multiple clients are located in the same building, which reduces travel time to 2-3 minutes. The travel time for caregivers who drive is significantly affected by current traffic conditions, which occasionally can extend the travel time to up to 30 minutes.

Type of vehicles used:

- Bicycles provided by the employer and personal cars (with permission) are used by the operators. Tömegközlekedés?

Ownership of the vehicle:

- Bicycles are owned by the employer.
- Personal cars used by operators are owned by the caregivers themselves.

Km travelled:

- There is no data available on how many kilometers caregivers who travel by foot or bicycle cover in a day.
- caregivers who drive cover 30-60 kilometers per day.

Incidence of fuel costs and/or km reimbursements on the service:

- The cost of working with a vehicle represents approximately 2% of the service's cost.

Adoption of a digital system for detecting performance and movements (clocking machine):

- We do not have available information about this yet.

Other relevant with respect to the organization of the service:

- Bicycles with lockable storage boxes (cargo bikes) are suggested to increase efficiency by enabling caregivers to perform tasks like shopping for multiple elderly individuals simultaneously.

Geolocation of users:

- Users are located within Szombathely city and 7 surrounding municipalities.

The constraints

Public contract involvement:

- According to Act III of 1993 on social administration and social services, it is mandatory for local municipalities to provide home help services within their respective areas.

Economic participation by users:

- The Municipal Decree No. 11/1993 (April 1) of the City Council of Szombathely regulates the fee for personal care services provided in social and child welfare services, according to which a fee must be paid for these services. The decree specifies the amount of the personal care fee to be paid.

Criteria for calculating the fee by the public body:

- According to Government Decree No. 29/1993 (February 17) on the fee for personal care services provided in social services, in the case of home help services, both institutional and personal care fees must be determined on an hourly basis. The amount of the personal care fee (hourly rate) to be paid is specified in the agreement, which is determined based on the client's income from the previous month.

Time constraints:

- The service includes daily care, with some users requiring assistance two to three times a day and care is provided on weekends and public holidays for some users as well.

Night and/or public holiday service:

- The service is available on weekends and public holidays, with 26 individuals receiving care two to three times daily during these times.

Obligation to ensure the stability of operators for each user:

- There is no obligation but moral and human reasons so whenever possible, the same caregiver goes to a person. Since continuity is important for the elderly; many are in very vulnerable situations it is important not to change caregivers frequently.

Characteristics of the vehicles to be used:

- Bicycles provided by the employer and personal cars (with permission) are used by the caregivers.

Possible environmental criteria in the call for tenders:

- We do not have available information on this.

What can be improved

Introduction of Electric Bicycles:

- Currently regular bicycles are used by 21 caregivers which is environmentally friendly but they lack carrying capacity which is a crucial part of the home care service. We can improve this by introducing electric bicycles with lockable storage boxes (cargo bikes) that can enhance efficiency by

allowing caregivers to travel faster and carry more items, reducing fatigue and increasing the number of clients they can serve in a day.

Optimization of Personal Car Use:

- Currently 8 caregivers use their personal cars with permission. Encouraging the use of hybrid or electric cars can reduce environmental impact and operational costs. Implementing a shared vehicle system could also optimize car usage among caregivers.

Route Planning and Optimization:

- Utilizing route optimization software can help in planning the most efficient routes for caregivers, reducing travel time and increasing the number of clients served.

Service 2: Support Services for People with Disabilities by FEHE

Social Service Title

Support Services for People with Disabilities – partly home service (helping with everyday tasks at home, doing shopping etc.), partly transportation (driving the disabled to school, work or to health service). The service is provided on workdays between 08.00 till 16.00, the times are not sharp (the morning may start from 7.00 when there are requests for it). Shifts and operator movements are organised on a weekly basis by the group leader, based upon the users' requests submitted previously. Shift orders are prepared a week ahead. Operators are assigned to their usual users/clients as much as possible to keep service provision as smooth and helpful as possible.

Type of provider: Public Nonprofit Ltd. for the Disabled and Homeless. (abbreviation in Hungarian: FÉHE). It's a nonprofit company owned 100% by the Municipality of Szombathely City with County Rights, aiming to provide services for the disabled and the homeless within the territory of the city and the surrounding small region (75.000 + appr. 25.000 inhabitants).

- Users: Disabled persons living in their own home
- Number of users: 60-65 persons per year, on a daily-weekly basis.
- Number of operators: Altogether 5. 2 persons as trained therapeutic staff, 2 drivers, 1 group leader also participating in the everyday tasks
- Operators
    - Average age: 51 (between 46-56).
    - Gender: 1 man, 4 women.
    - Qualifications: 1 university graduate social worker, 4 social workers with lower level qualification (tertiary level training)
- Territory: the morphology of Szombathely and its surrounding is favourable for transport, relatively flat with small bumps only. The road network covers the area well which helps reaching out to each person in need.

Organization of the service

- Service is provided on workdays between 08.00 till 16.00, the times are not sharp (the morning may start from 7.00 when there are requests for it).
  Rush hours are 7.00-11.00, 13.00-15.30
- Shifts and operator movements are organised on a weekly basis by the group leader, based upon the users' requests submitted previously. Single requests are handled individually, if they fit in the fixed shift order. Shift orders are prepared a week ahead. Operators are assigned to their usual users/clients as much as possible to keep service provision as smooth and helpful as possible.
- An average operator works with 5 clients requiring home service + 5 clients requiring help in travel.
- Average time spent by operators at users' homes: 60-70%
- Average time operators move from one user to another: no exact data available

Within the city, the institution provides daytime care for the elderly exclusively to residents of Szombathely.

Constraints

- Public contract involvement:
    - There is a contract with the central government for providing obligatory social services for the public, financed by the central budget. Another contract with the local government covers extra services financed by the local municipality budget. The financing of the service provision comes from 3 sources: central budget 88.73 %, municipal budget 2.99 %, payments of the users/clients 8.28 %. According to

the municipal decree 11/1993 (IV. 1.) of the General Assembly of Szombathely City with County Rights on the fees for personal care social and child welfare services, a fee must be paid for the service. The decree regulates the amount of the personal contribution fee to be paid.

- Criteria for calculating the fee by the public body:
  - Based upon the real costs of the service and the travel costs per km, and decreased if the financial status of the client justifies it.
- Time constraints:
  - Service is provided only on workdays, between 8-16.
- Obligation to ensure the stability of operators for each user:
  - There is always a strive to create long-term links between user/client and operator. Whenever possible, the same operator is assigned to a certain client
- Characteristics of the vehicles to be used:
  - 1 of the 2 vehicles (the Ford Transit 9-person minibus) is barrier-free, an electric ramp for entering with wheelchair is installed.
- Possible environmental criteria in the call for tenders:
  - There no experience at the Municipality to apply environmental criteria in calls for tenders, it's new and has to be investigated first

Expected improvements

- modal change from car to bicycle or e-bike in home service cases to decrease CO2 emission and increase traffic attenuation
- change of cars for electric to decrease CO2 emission (electric cars, being less noisy can put less stress on children/people living with autism)
- reorganization of home service cases for combining runs when shopping is needed, which could be done and delivered with an e-cargo bike instead of separate bicycle runs or car use
- the use of a route optimization software could decrease mileage to be covered with the service provision
- changing from bicycle to e-scooter would only have one positive effect: saving travel time, thus becoming more effective time-bound.

C. MOBILITY RECCOMENDATIONS

This part of the document had been developed by PP7, Institute for Computer Science and Control SAK, University of Budapest and is spart of D1.2.3 „Joint strategy and Action Plan "which will be concluded after the integration of the data emerging from D1.2.2 „Baseline analysis", which is due by the end of February 2025.

In addition, the following specification about the role of Mobility Managers to support local municipalities has been included.

1. Mobility Managers

The role of a Mobility Manager has become increasingly crucial for municipalities seeking to develop and implement effective sustainable mobility strategies, particularly in the context of essential services like home care. This specialized position serves as a cornerstone for transforming traditional transportation systems into more sustainable, efficient, and environmentally conscious operations.

At the strategic level, the Mobility Manager serves as the architect of the municipality's sustainable mobility vision. They develop comprehensive mobility plans that integrate with existing city services while pushing forward innovative solutions for reducing carbon footprint. Their expertise enables them to coordinate complex transitions, such as shifting to sustainable vehicle fleets, while ensuring service quality remains uncompromised. This role is particularly vital in home care services, where reliability and efficiency directly impact vulnerable citizens' well-being.

The specialized expertise a Mobility Manager brings to a municipality is invaluable. Their professional knowledge encompasses not only sustainable transport solutions but also technical aspects of fleet management, current mobility innovations, and emerging trends in the field. This expertise allows them to make informed decisions about vehicle selection, infrastructure requirements, and implementation strategies. Their knowledge of best practices from other successful municipal programs helps avoid common pitfalls and accelerates the adoption of proven solutions.

In terms of stakeholder management, the Mobility Manager acts as a crucial bridge between various interested parties. They coordinate between healthcare workers, service users, municipal authorities, and technical partners, ensuring all voices are heard and considered in the decision-making process. This central role in stakeholder management is essential for building consensus and maintaining support for sustainable mobility initiatives.

The economic benefits of having a dedicated Mobility Manager are substantial. Through optimal resource allocation, strategic fleet utilization, and effective budget management, they help ensure the financial sustainability of mobility programs. Their ability to identify cost-saving opportunities and secure additional funding through grants and partnerships can significantly improve the economic viability of sustainable mobility initiatives.

Environmental impact management is another critical aspect of the role. The Mobility Manager sets and monitors environmental targets, tracking carbon footprint reduction and ensuring compliance with environmental regulations. Their work in developing and implementing green

mobility solutions directly contributes to the municipality's environmental goals and helps create more livable communities.

Service quality enhancement remains a primary focus, particularly in the context of home care services. The Mobility Manager ensures reliable and efficient service delivery through implementing quality control measures, monitoring user satisfaction, and developing continuous improvement strategies. They coordinate staff training programs to ensure all personnel are well-versed in new sustainable mobility practices and technologies.

For municipalities like Bergamo, Klis, and Szombathely, having a dedicated Mobility Manager can be transformative in achieving their sustainable mobility goals while maintaining and improving essential services. This role becomes particularly important when implementing innovative projects that require careful coordination, expertise, and stakeholder management to succeed.

The following section deals with the choice of the most appropriate vehicle to turn the fleet used by the local authorities to deliver their services and a list of the main features per kind of vehicle are provided, according to the D.1.2.3 that is under preparation by SAK as mentioned at the beginning of the paragraph. Specific recommendations will be provided in such deliverable per each municipality on how to guide the selection of the most appropriate vehicle, also based on the data collected and analysed thanks to the baseline analysis provided by Politecnico di Milano in D1.2.2.

2. Technological solutions for HDSS

Micromobility

Lightweight, often electric-powered vehicles designed for short distances, typically within urban areas.

E-scooters

E-scooters are versatile, affordable, and have a 15–60 km range with a top speed of 25–40 km/h. They’re easy to park, portable, and can be folded for transport. However, heavier models can be harder to carry, and they’re not ideal for use in rain, snow, or extreme temperatures. Has limited carrying capacity. Batteries can take up to 4–8 hours to fully charge (depending on size).

E-bikes (Electric Bicycles)

Electric bikes have higher initial and maintenance cost compared to traditional bikes. Depending on battery size they have 40-120 km range with one charge and can go as fast as 25-40 km/h. Can easily handle inclines with motor assistance and have regenerative braking feature. It has low (well to wheel) emissions. Has limited carrying capacity.

E-mopeds

E-mopeds are cheaper to run than fuel-powered mopeds and have lower maintenance costs and have significantly lower environmental impact. Good for short to medium-distance travel (typically 40–100 km range per charge) with speeds up to 25–50 km/h, suitable for urban use. They are easy to ride, with no manual transmission or clutch. Batteries can take up to 4–8 hours to fully charge, limiting their availability. Heavier than bicycles or e-scooters, making them

harder to move manually. Requires driving license, registration and insurance in some countries. Performance may decline in rain, snow, or extreme temperatures. There are specialized builds (e.g., covered, three-wheeled, etc.) that are developed for specific tasks, e.g., item delivery.

E-cargo bikes

Electric cargo bikes are similar to regular cargo bikes but have an electric drive, assisting pedalling or throttling, reducing strain, even on hills. They have 40-100 km range with 4-8 hours of charging time. Their capacity is similar (100-250 kg) to regular cargo bikes. Ideal for heavy loads, hilly terrain. Susceptible to bad weather.

Conventional Bicycles

Bicycles are affordable and have low maintenance. Since they have no external power source, its range and speed depend on the user. They are easy to park and lift. It has zero emissions, have limited carrying capacity and limited use in bad weather.

Cargo bikes

Cargo bikes are heavier and slower than conventional bicycles but have freight capacity up to 250 kg making it suitable for item delivery in urban areas. They come in various designs (e.g., front-loading, longtail, or trikes) to suit different cargo needs. They have no emissions and much cheaper to operate compared to cars or vans. Can use bike lanes and park anywhere. On the other hand, they are heavier than regular bikes, making them harder to store, transport, or manoeuvre in tight spaces. Can be challenging to ride without e-assist, especially when fully loaded and takes time to learn using them properly.

Microcars

Microcars (e.g., Renault Twizy) are smaller than regular cars, can only transport one (or maximum two) passenger(s). They are easier to navigate in urban areas and have low environmental impact. They exist in small cargo version too. In some countries, microcars are classified as quadricycles, requiring less stringent licensing or registration. Lower speeds (typically 45–90 km/h) make them unsuitable for highways or long-distance travel and lack many safety features a regular car has. Electric microcars have limited ranges (50–150 km), making them unsuitable for long trips. In contrast to most other micromobility options, they are less sensitive to weather.

Passenger cars and vans

Passenger cars and vans are the most versatile mode of transport. For passenger transport cars and vans are the most appropriate. Vans have larger carrying capacity (up to 3,5 t gross vehicle weight) and can be rebuilt to support the transport of people with disabilities (e.g., wheelchair access). They are comfortable and insensitive to weather. On the other hand, congestion and limited parking infrastructure can reduce their efficiency.

Internal combustion engine vehicles

Currently, the Internal combustion engine vehicles are the most widespread types of cars. The infrastructure for them (refuelling, maintenance) is well-established. They are generally less expensive upfront compared to hybrids or electric vehicles, provide longer range and quick

refuelling times, making them ideal for long distance trips, have high availability and are insensitive to weather. On the other hand, they are causing significant air pollution relying on fossil fuels. Their operating costs is much higher compared to micromobility and there are several associated costs to their operation (insurance, taxes, maintenance, etc.).

Hybrid vehicles

Hybrids combine an ICE with an electric motor, offering improved fuel efficiency and reduced emissions compared to traditional ICE vehicles. Hybrids don't require external charging, as they use regenerative braking and the ICE to recharge the battery, making them convenient for users without access to charging infrastructure. Hybrids are generally more expensive than ICE vehicles due to their dual drivetrain systems. There are multiple types of hybrids based on drivetrain configuration:

- Full Hybrids (FHEV): Operate using the internal combustion engine (ICE), electric motor, or both, with short electric-only driving capability (e.g., Toyota Prius); no charging is required, range is typically 500–800 km, and prices are moderate.

- Mild Hybrids (MHEV): Use a small electric motor to assist the ICE for better efficiency but cannot run on electricity alone; they have similar range (500–800 km) to ICE vehicles, no charging needed, and slightly higher prices than traditional cars.

- Plug-In Hybrids (PHEV): Have larger batteries that can be charged externally, offering 30–100 km of electric-only range before switching to the ICE (e.g., Toyota Prius Prime); charging takes 2–4 hours, and they are more expensive than FHEVs but cheaper than EVs.

- Series Hybrids (Range-Extended EVs): The electric motor powers the wheels, while the ICE functions as a generator to recharge the battery (e.g., BMW i3 REx); range depends on the battery and fuel tank size (typically 200–400 km), charging takes 4–8 hours, and prices are relatively high.

- Parallel Hybrids: Both the ICE and electric motor are connected to the drivetrain and can power the vehicle simultaneously (e.g., Honda Accord Hybrid); range is comparable to FHEVs at 500–800 km, no charging is required, and prices are moderate.

Electric vehicles

EVs produce zero tailpipe emissions, making them the most environmentally friendly option. They have lower operating and maintenance costs due to fewer moving parts and the absence of an ICE. With government incentives and expanding charging infrastructure, EV ownership is becoming more accessible. EVs have a higher upfront cost than ICE and hybrid vehicles, although prices are gradually declining. Their driving ranges vary from 200–600 km per charge, charging takes 30 minutes (fast) to 8 hours (home).

Fuel cell vehicles

FCVs use hydrogen fuel cells to produce electricity, emitting only water vapor, making them an eco-friendly choice. They offer a driving range comparable to ICE vehicles, typically 300–500 km per tank, and refuelling takes only a few minutes. Hydrogen infrastructure is severely limited and investing in one is very costly. Hydrogen production is energy-intensive, and most hydrogen is currently derived from natural gas, which reduces its environmental benefits. FCVs are more expensive to produce than other vehicles, and their maintenance requires specialized

expertise. The technology is still in its early stages of adoption, meaning limited model availability and higher costs for consumers.

Biofuels

Biofuels are most suitable as transitional energy sources, supporting decarbonization in transportation. They are compatible with conventional internal combustion engines. Biofuels are renewable energy sources derived from organic materials like plants, agricultural residues, and waste. Common types include ethanol, produced from crops like corn and sugarcane, and biodiesel, made from vegetable oils, animal fats, or recycled cooking oils. They have reduced greenhouse gas emissions compared to fossil fuels. renewable and are often locally sourced. Their main disadvantage is they are competing with the food industry with land use and are hard to scale. The European Union (EU) has implemented regulations to ensure that biofuels contribute to greenhouse gas (GHG) reduction making them a green energy source.

Buying electricity from greener sources - The market-based approach

The market-based method considers the organization's specific electricity purchasing choices, considering: Direct contracts with renewable energy providers, Purchase of renewable energy certificates (GO, REC, etc.), Power Purchase Agreements (PPA), Energy mix declared by the chosen supplier. The certified share of electricity produced by renewable sources results in zero emissions. The residual amount results in emissions, to be estimated using a residual mix emission factor. The electricity residual mix of a country represents the share of electricity supply for which the energy source is not proven through cancellation of Guarantees of Origin or other Reliable Tracking Mechanisms. The residual mix emission factor is generally higher than the average grid factor (location-based) because it excludes renewable energy that has already been claimed through contractual instruments. A suitable reference at European level is represented by the AIB - European Residual Mixes 2023 Report, subject to yearly updates.

Accordingly, HDSS should thrive for sourcing electricity from greener sources when possible.

D.KPIs FOR PILOT ACTIONS EVALUATION

Key Performance Indicators (KPIs) are essential tools for evaluating the effectiveness of new approaches in various organizations. They provide measurable data that can guide decision-making, monitor progress, and ensure that objectives are met. By systematically assessing performance through KPIs, organizations can identify areas for improvement, allocate resources efficiently, and demonstrate accountability to stakeholders.

In Green LaMiS, the pilot actions aim to test and implement sustainable mobility solutions within the social services sector. These actions are crucial for reducing the environmental impact of mobility and improving the accessibility and efficiency of services.

It is essential to establish KPIs to evaluate the success and effectiveness of these pilot actions. KPIs will help measure the environmental impact, cost-effectiveness and efficiency as well as social aspects like satisfaction and service quality of the mobility solutions, enabling better decision-making and continuous improvement. Monitoring these indicators will also allow for assessing how well the solutions meet the goals of reducing ecological footprints and improving social service delivery, ensuring that the pilot actions lead to actionable, scalable outcomes.

The detailed definition and presentation of the KPIs will be provided in Deliverable 2.2 developed by the Centouris Institute of the University of Passau.

The adoption of such deliverable will be supported by a series of dedicated workshops for the municipalities to clarify the content, objective and functioning of each indicator.

The purpose of the deliverable on KPIs is to make available to all the project partners a “Common set of KPIs which evaluate the process, the results, and the margins for improvement of the green mobility activities tested in the pilot actions and the possibility of applying them to other services” (from presentation of Deliverable 2.2.1, Pilot Action KPIs, Sustainability Impact Score, Cost-Benefit Feasibility Score, Centouris Institute).

E. ECONOMIC SUSTAINABILITY STRATEGIES AND OPERATIONAL EFFICIENCY

The **Mobility Manager,** planned in the three municipalities, will support the development of the pilot project. Specifically, he will be responsible for:

1. **Cost Optimization** through:

- Fleet Management Efficiency
  - **Implementing preventive maintenance programs** to extend vehicle lifespan
  - **Optimizing route**s using AI-based mapping systems to reduce fuel/energy consumption, which could already be available in case of car-sharing providers
  - Integrating real-time GPS and GIS systems for adaptive route planning, which may be available in the case of car-sharing providers
  - **Selecting** energy-efficient vehicles based on total cost of ownership, to be carried out at the beginning of the pilot action
- Operational Efficiency
  - **Proposing digital scheduling systems** to maximize service delivery
  - **Suggesting** resource sharing between departments or municipalities
  - **Training staff** for efficient vehicle use and maintenance
  - Collecting data, compiling the carbon footprint toolkit (WP1), and optimizing energy consumption

2. Revenue Generation and Cost Recovery

- **Service Diversification**
  - Expand services during off-peak hours
  - Combine with other municipal services (e.g., medicine delivery)
  - Offer specialized transport services for medical appointments
  - Create partnerships with local healthcare providers
  - Develop supplementary services based on community needs
- **Funding Sources**
  - EU funding programs for sustainable mobility
  - Public-private partnerships
  - Green financing instruments

3. Partnership Development

  - Local business sponsorships
  - Academic research partnerships
  - Technology provider collaborations
  - Other NGO partnerships for service delivery
  - Community organization involvement

4. Innovation and Scaling

- **Technology Integration**

- Mobile apps for service optimization which may be available in the case of car-sharing providers
- **AI-driven real-time tracking systems for dynamic route adjustments** which may be available in the case of car-sharing providers

- **Service Expansion**
  - Gradual scaling to neighbouring areas
  - Service model replication in other municipalities
  - Development of best practice guidelines
  - Creation of training programs

5. Risk Management

The Mobility Manager, in collaboration with the social enterprises managing the service and the municipalities, will have to draft a **risk management plan** to identify risks and corrective measures for the decisions made during the initial phase of the pilot action.

F. PILOT ACTIONS COMMUNICATION

This section wants to provide operational guidelines to translate the strategy into practical communication actions to support the impact and outreach of WP2 and offers both a general overview at international level and some dedicated suggestions for implementation at local level by the municipalities.

WP2's Communication Strategy starting points and suggestions for Local development

WP2: Ground testing and validation of the joint strategy and Action Plan: the general WP2's objective is *testing on the ground the strategy and action plan for green urban mobility identified and elaborated in WP1*.

WP2's Communication goals are (from Application Form):

- Engaging and involving all the actors in the pilot action, such as local authorities, social enterprises, vehicles providers, final services' beneficiaries, local communities.
- To develop a local communication activity to reach the project testers.
- To create a transnational common level to share the local experiences.

WP2's main targets: In WP2 the communication targets are mainly external, with the aim of engaging them in the experimentation and making them actively participate. Internal communication, on the other hand, is more aimed at monitoring activities and sharing what is happening in the different territories:

INTERNAL Targets:

- Research centres
- Local Partner Authorities
- Regional Authorities
- Consultancy agencies
- Social enterprises Consortium
- Associated partners

EXTERNAL Targets:

- Local Social Enterprises
- Final Users of the service
- General Public
- Business Support Organizations
- Infrastructure and (public) service providers
- Sectorial Agencies

Phases for designing and drafting the communication activities

The main objective of this section is to support the design of effective communication activities while deeply understanding the targets.
The targets of Green LaMiS project are different from each other, have different interests and concerns, but above all they have different characteristics depending on the territories they belong to.
For this reason, it is very important that local partners proceed with an analysis of external targets to understand:

- How to decline the single topics
- Which communication channels are best to use

- Which tone is more appropriate
- How often is it necessary to communicate to keep attention alive and produce a change in collective awareness.

Operational phases to define communication activities:

a. **Definition of the communication objective**
The general objectives of the communication strategy are to: engage and involve actors, reach the testers, create a transnational common level in term of green consciousness and capacity of sharing experiences.
But, to achieve such macro-objectives, communication must set itself more operational objectives to be achieved through a set of actions and arguments.
These are some guiding questions to help to define operational objectives for communication:
   - what kind of problems or blocks do I have to overcome if I want to: capture attention, engage, reach and create a common awareness?
   - What kind of impact do I imagine I will have with this project?
   - What kind of problems I want to solve?
   - and so, what is the purpose in my territory?
   - At the end of the pilot action, what results do we want to have achieved: on the territory, with citizens, with all the actors involved?
   - What do we want to be recognized/identified for?
   - What short sentence defines your vision? (nb. From vision to a operative purpose).

   Answering these questions allows us to understand what communication must do and what its operational objectives must be in a specific territory, with specific targets and partners.

b. **Focus on the characteristics of the product/service of the pilot action in your territory**
The next step is to focus on the specific characteristics of the "product/service" the WP2 want to test during the pilot action:
   - what is the "product/service" promoted by the project?
   - what are the main/relevant characteristics?
   - what are the strengths?
   - what is the distinctive element?

c. **Definition of targets and their characteristics**
In the general communication strategy at the point 4.4 the main targets of the project are described by focusing on their role in the project, their main topics of interest and the most suitable tone of voice to communicate with them.
Now is important to go deeper inside the characteristics of the single local targets to understand:
   - The Demographical aspects if the target is composed by people: age, gender, income, education, social situation, daily problems etc.
   - The organisations (or legal entities) characteristics: sector, size, problems, reference territory, activities carried out, main customers/users, purpose, institutional relations, etc.
   - The Geographical specific and mobility: morphology, traffic and related problems, road characteristics, public transport system, citizens' mobility habits, etc.
   - Psychographic data: the attitudes, interests, personality, values, opinions, and lifestyle ecc.
   - Behavioral information: referred to ecological skills and green awareness, sustainable mobility choices, purchasing behavior, product usage, etc.

d. **Identifying the "antagonists" of the project and their characteristics**

It is also important to identify the "antagonists" of the project, those who do not share its values and are not willing to change their habits. Understanding who they are, their motivations and the channels through which they communicate is useful for trying to develop communication actions capable of limiting their harmful effects and/or developing equally strong arguments in favour of the project to engage the largest possible audience.

e. Value Proposition Analysis

Value Proposition Analysis is the heart of planning communication activities. Here we find the reasons why individual targets are willing to be engaged and participate in the project, to change their habits and/or to take a broader point of view on the topic of sustainable mobility.

The value proposition says:

- what needs does the project satisfy
- what problems does it solve
- what advantages does it generate

Not only on a practical and daily level but also in emotional, relational, social terms, of belonging to the territory, of personal satisfaction, etc.

f. Definition of Channels and tones

The channels describe the ways and means through which the different targets can get in touch with the project manager on the territory to get information, ask questions, participate, etc.

The choice of channels (online, off-line, website, social, brochures, flyers, etc.) to use must consider various elements:

- which channels does that target usually use to: get information, learn, communicate, etc.?
- through which channels does it prefer to be reached?
- how would it like to be reached?
- how is it necessary to integrate the channels with each other? (e.g. if I publish an article in local newspapers, at the same time I cannot fail to include a post on social media and/or a physical touch point at the local partner's headquarters, etc.)
- what can the target do/which channels should it use to: get to know me, test me, stay in touch, etc.

When choosing a channel, it is necessary to consider its characteristics, because these also determine the timing of the various communication actions, the contents and the tone that will have to be used.

- Dedicated page on the website: the contents must be updated periodically with the project progress; it is a place of institutional communication; therefore the tone of voice will be formal and official.
- Social media pages: require a higher frequency of posting and a variety of "columns" to be engaging; the tone of voice can be more informal and direct.
- Informative materials: like posters, publications, articles, ecc. require a graphic component and a choose of contents that can be stable for the entire duration of the project; the tone of voice must be formal and informative.
- Media & press: at the beginning of the pilot action and at the end is suggested to have some interaction with the local press to promote the starting of the action, describing the baseline, to celebrate the reached objectives at the end of the experimentation.
- Local events: are very important channels to interact physically with the targets and to offer a direct experience of the project and an emotional engagement.

The definition of the channels through which communications will be conveyed also serves to define the way in which targets and project partners can enter and remain in contact with each other.

It is about defining a sort of customer care to maintain a direct relationship with key players in the territory to promptly grasp any difficulties, needs for further information, willingness to be involved and how, etc.
Among the questions to ask yourself when defining this aspect:

- what type of relationship do we have with each target?
- how can this relationship be improved?
- what objectives do we have with these targets (also depends on what role they have within the project)?
- how do the targets want to be involved and/or informed?

g. KEY ACTIVITIES and Phases

Definition of the most important and necessary communication activities to achieve the project objectives and targets. To understand what these activities could be, it is useful to ask the following questions:

- what activities are necessary to carry out to intercept and engage the different targets?
- what activities are necessary to carry out to activate the identified communication channels?
- what activities are necessary to carry out to maintain the relationship with the different targets?

At the point 1 of this section, you can find different type of actions which can be implemented during the pilot action.
Here there are some operative indications to realize those activities:

- Editorial plans for different channels – especially if you decide to use social media pages or blogs is necessary to develop a dedicated editorial plan which define what content to publish, what kind of content (image, article, interview ecc.), on which platforms (FB, LinkedIn, Instagram etc.), with what tone of voice and with what objective. To develop a proper editorial plan is important to identify also content streams, such as project updates, informative and educational content on the topics of mobility and sustainability, etc.
- The editorial calendar is an agenda that organizes the content to be published in a chronological manner, indicating the exact day and time of each post/article.
- Physical communication materials: Any flyers, brochures, totems, posters etc. must be designed both from a graphic point of view (in line with the Interreg Central EU guidelines) and from a content point of view: who are these materials aimed at? where should they be distributed? what objective do you want to achieve? in what quantities should they be produced? with what materials (the use of eco-sustainable and/or recycled materials is suggested, in line with the project aim).
- Touch points: are all the points through which the different targets can get in touch with you, they can be either physical places (e.g. an office and/or reference desk) or digital (e.g. an email to write to, social pages, etc.). In both cases, it is necessary to ensure that any question will have a proper answer and that interactions are followed up.
- Events: When organizing an event, it is necessary to define:
    - type of event (press conference, round table, demonstration, flash-mob, laboratory, workshop, etc.)
    - for whom: industry experts, SEs, LAs, students, citizens, etc.
    - when
    - where: location, necessary spaces, structures, etc.
    - program: contents, guests, activities, etc.
    - timetables
    - possible sponsorships
    - communication activities

- graphic materials and gadgets

Phase	Communication Strategy	Tools
Pre-launch	Announcement, objectives, stakeholder involvement	Press release, social media
Launch	Live demonstration, first ride videos, local media coverage	Social media, website
Mid-pilot	Progress updates, challenges, testimonials	Social media
Post-pilot	Impact report, scalability discussion, policy recommendations	Infographics, press release, website

Editorial meetings
Communication during the pilot action will focus on "the work in progress", i.e. i.e. the storytelling about of the subjects involved and how the field-testing phase takes place.
According to the project communication plan in this phase of the project, coordination on contents and communication tools through editorial meetings will be of the utmost importance.

The editorial meetings will be an opportunity to:
- check the progress of the project - share content suitable for communication (mainly through social networks and website and possibly through the press office);
- establish and update the editorial calendar with common publications or topics;
- request the three territories involved to collect testimonies (for example from social enterprises, local authorities or beneficiaries of social services), photos and videos relating to the means and delivery of the services;
- establish new visibility opportunities such as stickers to personalize vehicles with the image of Green Lamis and/or the delivery of materials, such as a brochure, to the social enterprises and beneficiaries involved.

The key components of the communication strategy will be as follows for local and international communication levels.

Local Communication Strategy:

1. Target Audiences:
   - Direct beneficiaries (care recipients and their families)
   - Local healthcare workers and service providers
   - General public in each municipality
   - Local government stakeholders
   - Local environmental groups and healthcare organizations

2. Key Messages:
   - Environmental benefits specific to each city
   - Improved service quality through modernized fleet
   - Community health benefits from reduced emissions
   - Innovation in public services
   - Care for both people and environment

3. Local Communication Channels:
   - Municipal websites and social media
   - Local newspapers and radio stations
   - Information sessions at community centres
   - Direct communication with care recipients

- Partnerships with local healthcare facilities
- Visual documentation of the transition (before/after)

International Communication Strategy:

1. Target Audiences:
   - Other municipalities looking to implement similar programs
   - EU policy makers and funding bodies
   - International sustainable mobility networks
   - Environmental and healthcare organizations
   - Academic institutions studying sustainable urban solutions

2. Key Messages:
   - Transferability of the pilot program
   - Cross-border cooperation success
   - Quantifiable environmental impact
   - Innovation in public service delivery
   - EU values in action (sustainability, social care, innovation)

3. International Communication Channels:
   - Case studies and best practice reports
   - Presentations at international conferences
   - EU platforms and networks
   - Professional social media (LinkedIn)
   - International sustainable mobility publications

For Bergamo, Italy:

Localized Implementation:

- Partner with local media outlets like L'Eco di Bergamo and Bergamo News
- Create content highlighting the connection between the historic city's preservation and sustainable mobility
- Engage with local universities (University of Bergamo) for academic validation
- Use the city's strong healthcare reputation (especially post-COVID) to emphasize the health-care connection
- Develop bilingual content (Italian/English) for broader reach

For Klis, Croatia:

Local Focus:

- Leverage the town's tourist visibility due to its fortress to add sustainable messaging
- Work with Split-area media as Klis is part of the wider metropolitan area
- Create visual content showing the challenges of providing care services in a historically significant hillside location
- Emphasize how sustainable vehicles can better navigate the unique topography
- Engage with local community leaders and neighbourhood councils

For Szombathely, Hungary:

City-Specific Approach:

- Connect with local industry partners, as it's an industrial centre
- Utilize the city's experience with EU projects for credible communication
- Partner with the local university college for research and validation
- Focus on economic benefits alongside environmental ones
- Create content in Hungarian and English to ensure local understanding

Cross-Cutting Implementation Tactics:

Documentation and Storytelling:

- Create a video series following the transition in each city
- Document real stories from care workers and recipients
- Track and visualize environmental impact data
- Develop before/after comparisons
- Create shareable infographics showing progress

Digital Presence:

- Develop a unified project website with sections for each city
- Create social media content calendars aligned with project milestones
- Use QR codes on vehicles linking to project information
- Implement a newsletter system for regular updates
- Create virtual tours of the new sustainable fleet

Stakeholder Engagement:

- Organize quarterly stakeholder meetings in each city
- Create a stakeholder advisory board
- Develop feedback mechanisms for service users
- Regular briefings for local politicians
- Training sessions for healthcare workers

Media Relations:

- Regular press releases on milestones
- Media kits with project information
- Journalist site visits
- Expert interviews with project leaders
- Success story features

The communication managers of the three territories involved will be asked to provide photos, videos, testimonies, quotes from the protagonists of the action, with the aim of creating a gallery and a repository of testimonies on the progress of the works.

In addition, dedicated meetings will be organized with the municipalities by the Communication Manager of the project to set up dedicated and tailored communication plans for the duration of the pilot activities.

G.STAKEHOLDERS' ENGAGEMENT

Stakeholder Engagement Strategy: Purpose and Approach

The primary purpose of the stakeholder engagement strategy for this sustainable mobility project is to ensure successful implementation and long-term sustainability of the home care service transformation across Bergamo, Klis, and Szombathely.
This strategy serves multiple critical functions: building trust, ensuring transparency, managing expectations, gathering valuable feedback, and creating a sense of shared ownership among all parties involved.

Core Strategic Objectives:

1. Building Trust and Transparency: The strategy aims to establish trust through consistent, open communication and transparent decision-making processes. By involving stakeholders from the project's inception, we create an environment where concerns can be addressed proactively rather than reactively. This is particularly crucial when implementing changes to essential services like home care, where both care recipients and healthcare workers may initially be skeptical about modifications to established routines.

2. Knowledge Sharing and Capacity Building: The engagement strategy facilitates continuous learning and knowledge exchange among stakeholders. Healthcare workers receive comprehensive training on new sustainable vehicles and modified service protocols. Municipal officials gain insights into sustainable mobility practices and their practical implementation. This knowledge transfer ensures that all participants understand not just what is changing, but why and how these changes benefit their community.

3. Ensuring Service Quality and Continuity: By actively engaging with care recipients and their families, the strategy helps maintain and improve service quality during the transition period. Regular feedback mechanisms allow for quick identification and resolution of any issues that arise during implementation. This approach ensures that the shift to sustainable mobility enhances rather than disrupts the quality of care provided.

4. Creating Local Champions and Advocates: The strategy identifies and nurtures local champions within each stakeholder group who can advocate for the project's benefits and help address concerns within their communities. These champions become crucial bridges between the project team and various stakeholder groups, helping to build broader support and understanding for the initiative.

5. Cross-Municipal Learning and Adaptation: By facilitating regular exchange between the three municipalities, the engagement strategy promotes shared learning and allows for adaptation of best practices to local contexts. This cross-pollination of ideas and experiences enriches the project and helps avoid common implementation pitfalls.

Implementation Framework:

The engagement strategy operates on three levels:

1. Strategic Level
   - Regular steering committee meetings with high-level stakeholders
   - Policy alignment discussions with municipal authorities
   - Strategic planning sessions for long-term sustainability
   - Impact assessment and evaluation meetings

2. Operational Level
   - Daily coordination with healthcare workers and service providers
   - Regular feedback sessions with care recipients
   - Technical training and support for new vehicle operators
   - Performance monitoring and adjustment meetings

3. Community Level
   - Public awareness campaigns
   - Community feedback forums
   - Local environmental group engagement
   - Healthcare facility partnerships

Monitoring and Evaluation:

The success of stakeholder engagement is measured through:

- Participation rates in engagement activities
- Feedback quality and quantity
- Issue resolution timeframes
- Stakeholder satisfaction levels
- Implementation milestone achievement
- Service quality indicators
- Environmental impact metrics

This comprehensive approach ensures that all stakeholders remain actively involved throughout the project lifecycle, from initial implementation through to long-term operation. The strategy is designed to be flexible and responsive, allowing for adjustments based on stakeholder feedback and changing circumstances in each municipality.

Some engagement tools that can be suggested (each municipality can choose what suits best their context and specific objectives) according to each target group are the following:

1. Direct Service Users (Care Recipients and Families):
   - Regular satisfaction surveys (both digital and paper-based)
   - Dedicated phone line for feedback and questions
   - Quarterly focus groups with family representatives
   - User-friendly feedback app/system in local languages
   - "Day in the Life" documentation showing service improvements
   - Local community ambassadors program

2. Healthcare Workers and Service Providers:
   - Monthly operational meetings
   - Digital platform for daily feedback and incident reporting
   - Training workshops on new vehicles and systems
   - Employee engagement program with rewards for sustainable practices
   - WhatsApp/Viber groups for quick communication
   - Regular skills development sessions

3. Local Government and Policy Makers:
   - Bi-monthly steering committee meetings
   - Data dashboard showing KPIs and environmental impact
   - Regular briefing documents with project updates
   - Site visits to showcase implementation
   - Joint planning sessions for scaling and sustainability
   - Policy impact assessment workshops

4. Environmental and Healthcare Organizations:
   - Partnership development workshops
   - Joint research initiatives
   - Collaborative events and awareness campaigns
   - Shared data collection and analysis
   - Regular roundtable discussions
   - Co-creation sessions for future initiatives

Engagement Tools and Platforms:

Digital Tools	Communication Channels	Documentation and Reporting	Event Formats
• Project management software (e.g., Asana, Trello) for tracking engagement activities • Stakeholder mapping and analysis software • Online consultation platform • Digital survey tools (SurveyMonkey, Google Forms) • Mobile app for real-time feedback	• Dedicated project newsletter (monthly or bimonthly) • Private LinkedIn group for professional stakeholders • Regular webinars and online meetings • SMS/WhatsApp updates for immediate communications • Video conferencing platforms for remote engagement • Podcast series featuring different	• Stakeholder engagement log • Impact assessment reports • Meeting minutes and action tracking • Photo and video documentation	• Annual stakeholder forum • Quarterly review meetings • Local community open days • Training and capacity building workshops • Innovation labs • Site visits and demonstrations

• Social media monitoring tools	stakeholder perspectives	• Success stories and case studies • Regular progress reports	

A detailed breakdown of the stakeholder engagement strategy for each municipality, considering their unique characteristics, challenges, and opportunities is provided here below:

Bergamo, Italy:

1. Local Context and Considerations
   - Large urban area with significant healthcare infrastructure
   - Strong existing healthcare networks and institutions
   - High environmental awareness among citizens
   - Complex urban mobility patterns
   - Experienced in managing EU projects

2. Specific Engagement Approaches:
   - Leverage existing healthcare networks for stakeholder coordination
   - Partner with local hospitals and medical facilities
   - Engage with urban mobility experts from University of Bergamo
   - Coordinate with local environmental groups
   - Work closely with neighbourhood councils (Consulte di Quartiere)

3. Implementation Focus:
   - Integration with existing urban mobility plans
   - Coordination with local healthcare providers
   - Environmental impact monitoring in urban setting
   - Public health benefits tracking
   - Cross-sector collaboration

Klis, Croatia:

1. Local Context and Considerations
   - Smaller municipality with strong community ties
   - Challenging topography (hillside location)
   - Tourist significance due to historic fortress
   - Part of Split metropolitan area
   - Rural-urban mix in service area

2. Specific Engagement Approaches:
   - Strong focus on community-level engagement
   - Regular meetings with local community leaders

- Coordination with Split metropolitan area services
- Engagement with tourism sector stakeholders
- Special attention to rural area service users

3. Implementation Focus:
   - Adapting services to challenging terrain
   - Building strong community support networks
   - Integrating with existing regional healthcare services
   - Maintaining service quality in remote areas
   - Leveraging community connections

Szombathely, Hungary:

1. Local Context and Considerations
   - Industrial city with strong economic focus
   - Established university presence
   - Experience with EU projects
   - Strong municipal administration
   - Mixed urban-suburban setting

2. Specific Engagement Approaches:
   - Engage local industry partners for support
   - Utilize university resources for research and validation
   - Work closely with municipal departments
   - Partner with local environmental initiatives
   - Regular coordination with healthcare providers

3. Implementation Focus:
   - Economic benefits highlighting
   - Academic partnership development
   - Industrial sector engagement
   - Municipal service integration
   - Data-driven approach to implementation

Cross-Municipality Coordination:
Not to loose the focus on the transnational dimension of the project and the creation of transnational benefit, the following coordination tools and strategies will be implemented:

1. Unified Reporting System
   - Standardized metrics across locations
   - Comparative analysis capabilities
   - Shared success stories
   - Common challenges documentation
   - Impact measurement framework

2. Joint Communication Initiatives

- Combined project website
- Shared success stories
- Cross-promotional activities
- Joint media releases
- International visibility efforts

3. Resource Optimization, as already foreseen in the project:
   - Shared expertise utilization
   - Common tools development
   - Joint training programs
   - Unified documentation systems
   - Collaborative problem-solving approach and strategies.

H. ANNEX 1: TEMPLATES FOR AGREEMENTS WITH SERVICE PROVIDERS (EXEMPLES)

This section offers two templates that can be used by municipalities when agreeing on the implementation of project activities with Social Enterprises or providers (Annex 1.1) or when arranging a collaboration with sustainable vehicle providers (Annex 1.2)

ANNEX 1.1

COLLABORATION AGREEMENT

BETWEEN

[Name of the Municipality], headquartered at [Address], Tax Code/VAT [Number], represented by the Mayor [Name and Surname] (hereinafter referred to as "Municipality");

AND

[Name of the Social Enterprise/Service Provider], headquartered at [Address], Tax Code/VAT [Number], represented by the Legal Representative [Name and Surname] (hereinafter referred to as "Social Enterprise");

WHEREAS:

The Municipality intends to develop innovative solutions for sustainable mobility within its territory through participation in the **Green Lamis** project, in line with the objectives of reducing emissions and improving the quality of life of citizens;

- The Social Enterprise has expertise in managing the transportation service under experimentation and commits to contributing to the implementation of the pilot project with its operational and managerial skills;
- The pilot project aims to test new models of inclusive, efficient, and environmentally friendly mobility through collaboration between public and private entities;

IT IS AGREED AS FOLLOWS:

Article 1 - Purpose of the Agreement

The Parties agree to collaborate on the implementation of the pilot project within the framework of the **Green Lamis** project, aimed at experimenting with sustainable mobility solutions in the Municipality's territory. The project includes:

- The activation of low-impact transport services, selected based on a tool developed within the project itself;
- Route optimization supported by a **Mobility Manager**;
- The development of a replicable model for other municipalities.

Article 2 – Roles and Responsibilities

1. **The Municipality commits to:**
    - Providing the necessary **logistical and infrastructural support** for the project implementation;
    - Supplying the **vehicle(s) required** for the pilot phase;
    - Monitoring the **environmental and social impact** of the project using dedicated tools developed within the project.
2. **The Social Enterprise commits to:**
    - Managing the **mobility service** in line with the project objectives;
    - Collecting the **necessary data**;
    - Preparing **periodic reports** on project progress and proposing any necessary improvements.

Article 3 – Governance and Coordination

The Parties establish a **Coordination Committee** composed of representatives from both the Municipality and the Social Enterprise, tasked with:

- Supervising the project implementation;
- Evaluating the **service performance** and proposing any corrective measures.

Article 4 – Risk Management Plan

The **Mobility Manager**, in collaboration with the Social Enterprise and the Municipality, will draft a **Risk Management Plan**, aimed at:

- Identifying **potential operational, economic, and environmental risks** associated with the project;
- Defining **corrective measures** to optimize service effectiveness;
- Continuously monitoring the project's progress and adapting it to emerging needs.

Article 5 – Duration and Termination Conditions

This agreement will be in effect for **12 months** from the date of signing.

Article 6 – Final Provisions

- This agreement does not entail any **direct financial obligations** between the Parties, unless otherwise agreed in subsequent arrangements;
- Any **modifications or additions** to this agreement must be made in writing and agreed upon by both Parties;

- In the event of any **dispute** regarding the interpretation or execution of this agreement, the Parties commit to attempting **mediation** before resorting to legal action.

Read, approved, and signed

Place, Date

For the Municipality

[Name and Surname] – Mayor

For the Social Enterprise

[Name and Surname] – Legal Representative

ANNEX 1.2

Collaboration Agreement between Municipality and Vehicle Provider

1. Purpose of the Agreement

This agreement outlines the collaboration between [Name of Municipality], located at [Address], represented by the Mayor [Name and Surname], hereinafter referred to as "Municipality", and [Name of Vehicle Provider], located at [Address], represented by the Legal Representative [Name and Surname], hereinafter referred to as "Vehicle provider".

The purpose of this agreement is to establish a partnership for the implementation and management of sustainable car sharing services within the municipality, in line with the objectives of reducing emissions and improving urban mobility.

2. Roles and Responsibilities

Municipality Responsibilities:

- Provide the necessary logistical and infrastructural support to facilitate the car sharing service.
- Ensure the integration of car sharing services within the existing mobility framework.
- Facilitate communication and coordination between municipal services and the Vehicle provider.
- Monitor and evaluate the environmental and social impact of the service.

Vehicle provider Responsibilities:

- Operate and maintain the car sharing fleet according to the agreed service standards.
- Provide electric or low-emission vehicles to ensure environmental sustainability.
- Ensure the availability and operability of vehicles during peak hours.
- Develop a mobile application for booking and real-time vehicle tracking.
- Collect and report data related to service usage, environmental impact, and customer satisfaction.

3. Governance and Coordination

A Coordination Committee will be established, composed of representatives from both the Municipality and the Vehicle provider. The Committee will:

- Oversee the implementation of the car sharing program.
- Review service performance metrics, including user satisfaction and environmental impact.
- Make necessary adjustments to improve service quality and accessibility.

4. Data Sharing and Privacy

The Vehicle provider will collect anonymized data related to vehicle usage, including:

- Trip duration and distance.
- Charging data for electric vehicles.
- User feedback on the quality of service.

All data sharing practices must comply with applicable data protection regulations, including the GDPR.

5. Duration and Renewal

This agreement will be effective for a period of XX years/months from the date of signature. Renewal will be subject to the evaluation of the project's success and the achievement of key performance indicators (KPIs), including:

- Reduction in CO2 emissions.
- Increase in sustainable mobility options.
- User satisfaction metrics.

6. Termination and Dispute Resolution

Either party may terminate the agreement by providing [number] months' written notice. In case of a dispute, both parties commit to mediation before seeking legal recourse.

7. Signature

Signed on [Date], at [Place].

For the Municipality:

[Name and Surname] – Mayor

Signature: _____

For the Vehicle provider:

[Name and Surname] – Legal Representative

Signature: _____

I. ANNEX 2: HOW TO MANAGE YOUR PROJECT INVESTMENTS

This annex provides practical guidelines for managing investments related to the pilot projects within the GreenLaMis program. The goal is to ensure an efficient and effective use of available resources while maximizing the social, environmental, and economic impact of the project.

An effective investment management is crucial for the success of the GreenLaMis pilot projects. Through proper financial planning, rigorous monitoring, proactive risk management, and scalable investment strategies, municipalities can maximize the long-term impact of their initiatives. The strategies outlined in this annex provide a structured framework to ensure that public and private resources are used efficiently, contributing to sustainable and inclusive urban mobility solutions.

Financial Planning

A clear budget allocation for investments has been defined in the project, serving as a foundation for planning the pilot action activities. The cost/activity benefit must be monitored throughout the project phase to collect investment-related data.

The first activity involves purchasing or leasing vehicles based on the analysis conducted in deliverable D.1.2.3.

Subsequent activities include:

- Planning training sessions for operators on vehicle usage, control, and maintenance schedules to ensure investments align with the project's long-term sustainability goals.
- Implementing a real-time monitoring system to control expenses against the budget, considering energy sources and maintenance costs.
- Using financial performance indicators (cost per kilometre, return on investment, energy savings, see Chapter E. KPIs for pilot action evaluation).
- Identifying potential risks to build a risk management plan with corrective measures for future development, considering:
    - Adopting modular solutions that can be expanded over time (e.g., adding more electric vehicles as funding becomes available).
- Promoting knowledge-sharing among participating cities (Bergamo, Klis, Szombathely) to enhance best practices (comparison meetings are scheduled during control moments).
- Establishing agreements with service management entities for vehicle utilization.

For Replicability

- Developing a standardized financial model that can be adapted to different regulatory and socio-economic contexts.

- Participating in European mobility networks to attract additional funding and technical support.

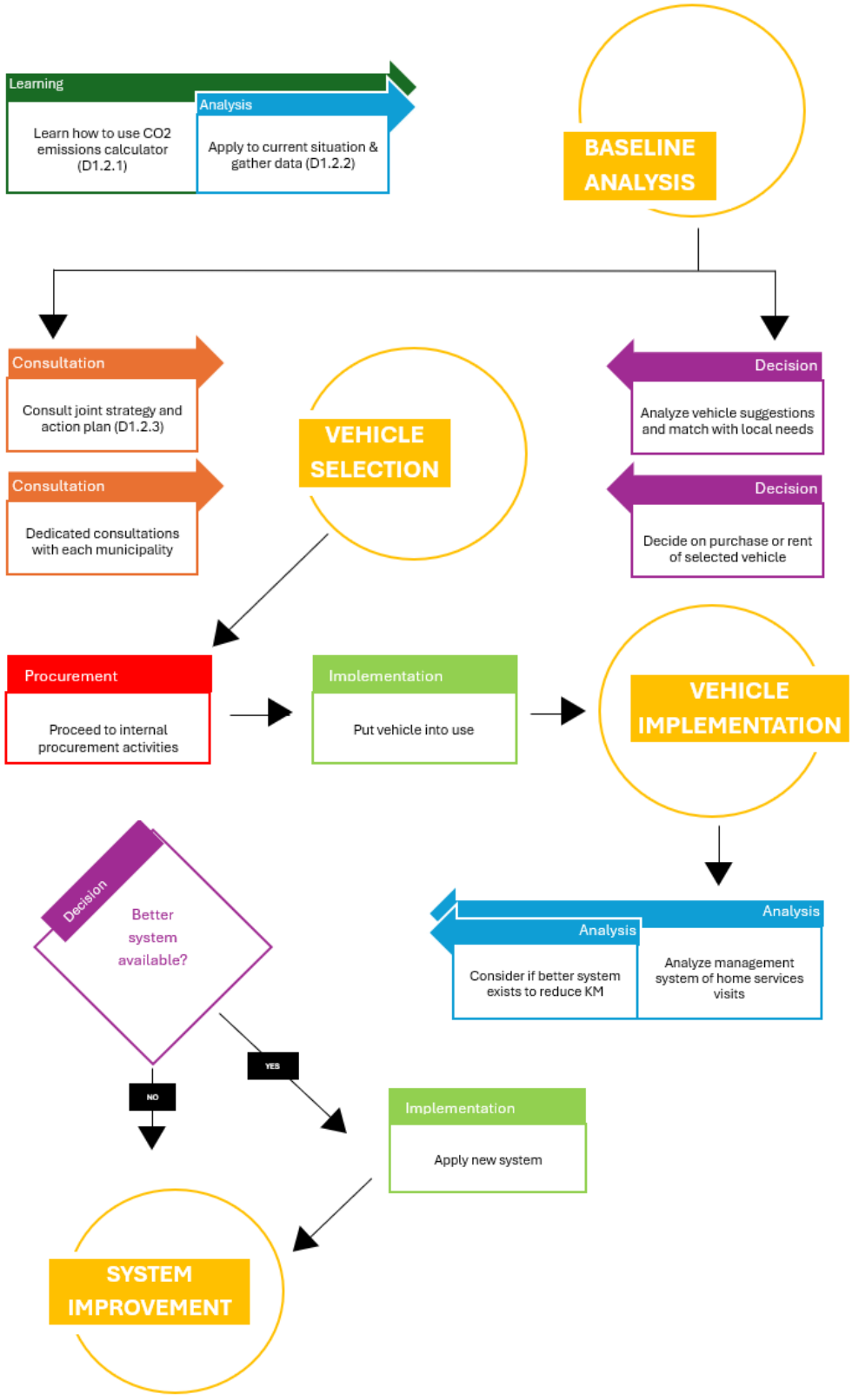
J. ANNEX 3: FLOW CHART FOR DECISION-MAKING GUIDANCE AND OPERATIONAL CHECK

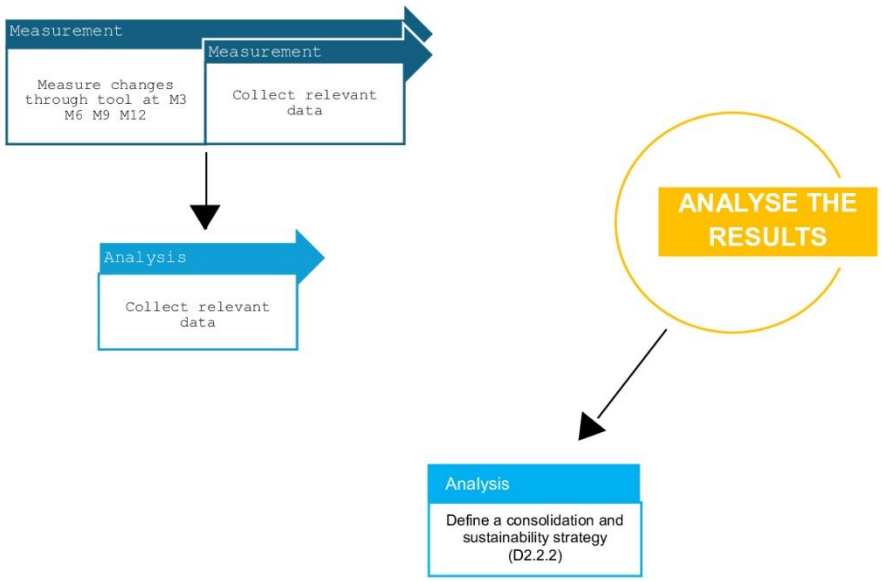
This annex offers an overview of the process that will lead to the implementation and evaluation of the pilot actions. It is structured in a series of activities according to a logical and strategic approach. Its purpose is to guide municipalities step by step in the implementation of the pilot actions and is divided into a first section describing the steps (highlighting when such steps are milestones for the process implementation) and in a second section describing them graphically.

STEPS

1. Learn how to use the CO2 emissions calculator/tool of Politecnico (dedicated workshops)
2. Apply it to the current situation and gather relevant data – Baseline analysis/MILESTONE
3. Consult the joint strategy and action plan deliverable
4. Dedicated consultations with each municipality
5. Analyse the suggestions on what vehicle to choose and match with local needs
6. Decide on the purchase or rent of the selected vehicle-s/ MILESTONE
7. Proceed to internal procurement activities
8. Put into use the vehicle/ MILESTONE
9. Analyse the management system of the home services visits
10. Consider if there is a better system to be applied to reduce km
11. If so, apply it/ MILESTONE
12. Measure changes through the tool at M3, M6, M9 and M12 of the pilot action implementation
13. Collect relevant data
14. Analyse the results / MILESTONE
15. Define a consolidation and sustainability strategy

GRAPHIC OVERVIEW OF THE PROCESS




Measurement
Measurement
Measure changes through tool at M3 M6 M9 M12
Collect relevant data
Analysis
Collect relevant data
ANALYSE THE RESULTS
Analysis
Define a consolidation and sustainability strategy (D2.2.2)