



Market Transformation Plan, Austria

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1. Introduction

1.1. BIOSIRE project

BIOSIRE aims to establish a shift towards bio-diesel and electric propulsion for fleets, ships and special vehicles in tourist areas in Spain, France, Greece, Italy, Croatia and Austria. The consortium is composed of regional authorities of tourist areas, energy agencies and research and consultancy organisations specialised in energy, agriculture and transport.

BIOSIRE local actions are directed at market transformation and changing the behaviour of fleet operators, tourists and residents, farmers and the potential suppliers of used cooking oils. These actions cover the full production and distribution chain.

During the first project year the stakeholders on the regional level have been identified and local working group meetings and a local workshop have been organised to prepare the market transformation.

This Market Transformation Plan sets its focus on the country of Austria. A similar plan focussing on regions is produced for five demonstrator regions in the BIOSIRE project.

All deliverables of the BIOSIRE project and other information on the BIOSIRE project can be found at www.biosire.eu.

1.2. Scope and approach

This Market Transformation Plan summarizes the results and conclusions from the first activities on the local level, and provides a detailed planning for the coming project-phase.

The approach for the market transformation plan for Austria is based on both, the availability of public funding for companies and municipalities in Austria (government or the Kommunalkredit bank providing finance for public-sector infrastructure investments) on the one hand, and the findings and work established within the BIOSIRE project on the other hand.

In Austria mainly the southern provinces Styria and Carinthia will be targeted by BIOSIRE, but also all other seven provinces will be included in the actions.

Biodiesel is not a very popular topic in Austria any more, but Austrian stakeholders are becoming increasingly interested in electric vehicles – therefore, in Austria the approach of BIOSIRE will strongly focus on market transformation actions towards an increased share of electric vehicles.

The strategic approach for Austria is determined by the goals that the project aims at. As the BIOSIRE project aims to conversion or replacement of a large number of vehicles, in Austria it is envisaged to reach as many tourism regions, fleet operators, taxi or car rental companies and municipalities as possible, and to provide these organisations and companies with relevant information in order to convince them that electric vehicles and biodiesel propelled vehicles are really good alternative options for their fleets. A large number of potential demonstrators has to be addressed individually, since each of them is in another project phase, has different targets and a different level of knowledge about alternative propulsion. This is a challenging task as the hours available for these actions are quite limited. Nevertheless it is the goal of FGM-AMOR to support and provide the most suitable results for tourism municipalities and regions.

2. National Market Framework

2.1. Existing legal framework

This section will provide an overview of the legal framework and regulations for biodiesel, the incentives for clean fuel usage and production, and the legal constraints hindering the implementation of clean fuel applications in Austria.

- Legal framework and regulations for biodiesel in Austria:

In Austria the EU Directive on the promotion of biofuels was adopted in 2004, followed by amendment of the Mineral Oil Tax Law in December 2004, which laid down that pure biofuels are completely exempt from mineral oil tax. The blending of up to 2% biodiesel in diesel is also exempted from mineral oil tax. There is also a tax reduction for the blending of up to 5% biofuels in petrol. In 2007¹, 18 biodiesel production plants produced 241,381 tonnes of biodiesel in Austria - 33% of this biodiesel were sold abroad. The process of the collection of used oil for biodiesel production is also well established and has no legal constraints in Austria.

The laws applicable in Austria for biofuels and electric vehicles are the following:

- Federal/national laws:
 - none explicitly (the motor vehicle law which does not contain specific information about the application of biodiesel)
 - Regarding electric vehicles EU law has been applied (lightweight vehicles class L6e and L7e) as the weight is calculated without battery weight

¹ Source: Austrian Federal Economic Chamber
http://portal.wko.at/wk/format_detail.wk?angid=1&stid=411327&dstid=8458&opennavid=43196

- Mineral Oil Duty Act² (Mineralölsteuergesetz, BGBl. I No 180/2004) was amended by the Tax Amendment Act (Abgabenänderungsgesetz) of 30 December 2004. Fuels with a biofuel blending of a minimum of 4.4% and less than 10 mg sulphur per kg fuel are granted tax concessions of 41,2 cent/litre for petrol and 29,7 cent/litre for diesel³. Pure biofuels are completely exempt from mineral oil duty.
- The fuel order (Kraftstoffverordnung, BGBl. II Nr. 418/1999): defines biofuels and fuel specifications, standards the biofuels need to comply to, the percentage of blending of fossil fuel. Furthermore it specifies that the seller of fuels need to provide evidence of the amount of blending to fossil fuels to the ministry of agriculture.
- Waste Control Law 2002 (Abfallwirtschaftsgesetz, BGBl. I Nr. 102/2002) defines that used cooking oil has to be collected and to be handled over to a waste disposal contractor. Also penalties are fixed with 2,910 € for companies and 70 € for private households.
- Regional laws/policies
 - Exemptions of fees for electric vehicles in local laws (e.g. no parking fees according to the parking policy)
- Financial incentives for usage and production of biodiesel:
 - In Austria biofuels are exempted from the mineral oil tax. This also applies for the biofuel part in ETBE (Ethyl Tertiary Butyl Ether).
 - Investments into new vehicles and refuelling equipment may be funded, if a calculation shows CO₂ savings.

² Austrian report on the progress under Directive 2003/30/EC (2007)
http://www.ebb-eu.org/legis/AUSTRIA_4th%20report%20Dir2003_30_at_report_EN.pdf

³ Federal government in Austria for environmental protection and environmental control <http://www.umweltbundesamt.at/biokraftstoff>

- For electric vehicles no tax⁴ (procurement tax NoVA, or horsepower-based insurance tax) on the vehicles is levied. In some cities there are also rebates in parking fees and car insurance taxes, but these rebates take into consideration only emissions and not CO₂ savings or fuel type.

2.2. Institutional framework

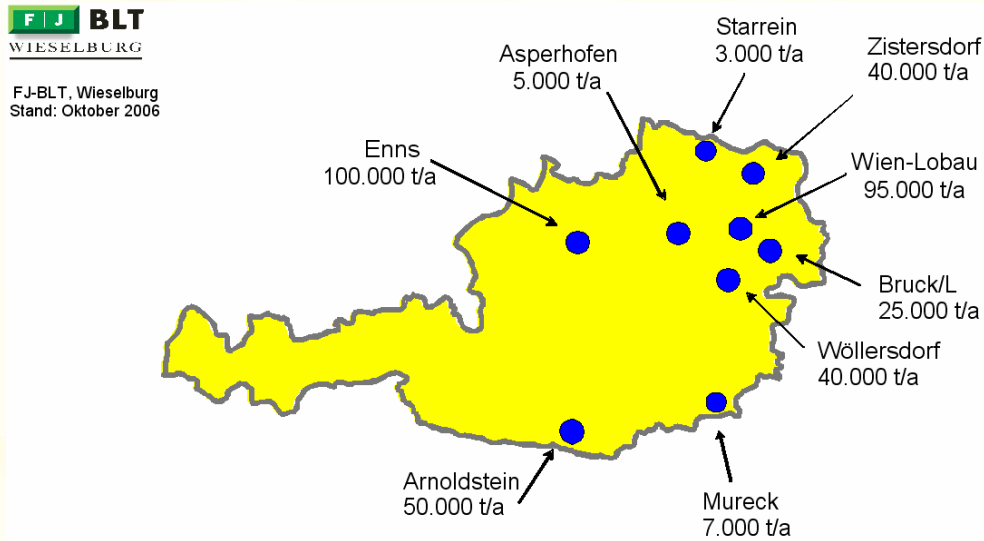
This chapter provides information on the major actors involved in biodiesel production, regulation, distribution and quality control in Austria.

The main actors involved in the biodiesel production process in Austria are:

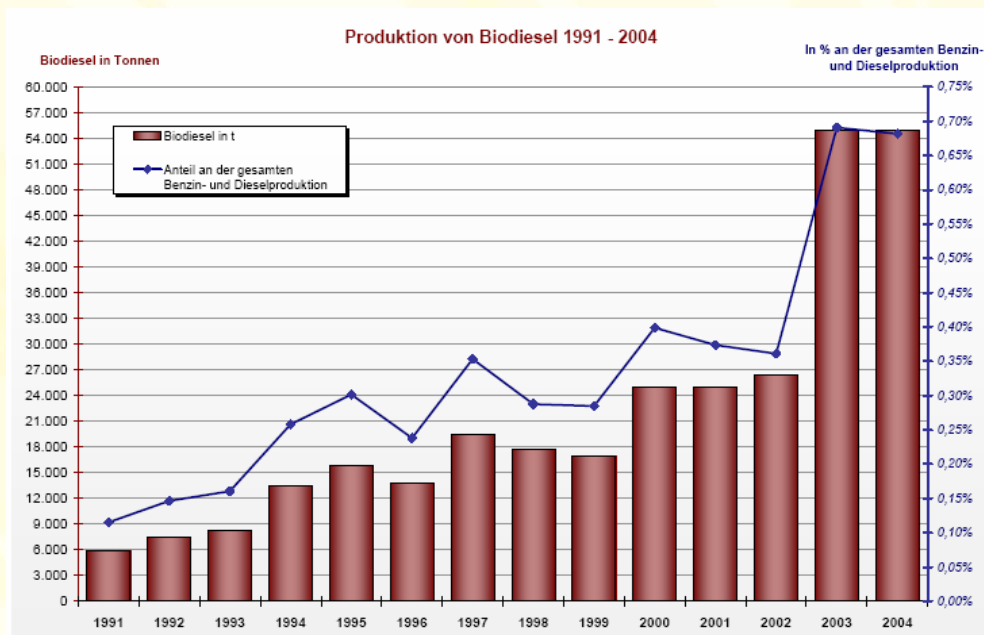
- private households, restaurants, catering businesses and canteens supply waste cooking oil - which are treated in 20 plants in Austria with a capacity of 100,000 tonnes / year⁵
- farmers / associations providing other agricultural raw materials for the production
- companies constructing, engineering and building biodiesel production plants
- production plants producing biodiesel
- distribution of B100 at some filling stations (public or private fleet stations)
- distribution to large oil companies for blending of fossil diesel
- public and municipal fleets or private pioneers to use it in their vehicles

⁴ 'Source: Lupower (electric vehicle distributor)
http://www.lupower.at/index2.php?option=com_docman&task=doc_view&gid=35&Itemid=1

⁵ Umweltbundesamt Austria, The status of the waste industry in Austria, 2008
(<http://www.bundesabfallwirtschaftsplan.at/filemanager/download/44242>)



Picture 1 - Biodiesel production in Austria (plants and capacity)⁶



Picture 2 - Biodiesel production in Austria (amount in tonns)⁷

⁶ BLT Bundesanstalt für Landtechnik Wieselburg - Biomass Logistics Technology Francisco Josephinum (<http://blt.josephinum.at/index.php?id=541>)

⁷ Source: Statistic Austria: Auf dem Weg zu einem Nachhaltigen Österreich, Indikatoren-Bericht, June 2006, page 88

In the province of Styria, for example, waste oil is collected in a systematic way by 250 restaurants of the City of Graz; also private households have the possibility to bring their waste cooking oil to specific containers at collection points spread all over the region. The collected waste cooking oil is delivered as valuable raw material for the production of biodiesel to the biodiesel production plant of SEEG (Südsteirische Energie- und Eiweißherzeugungsgenossenschaft; situated in Mureck - in Southern Styria).⁸ Similar schemes exist also in other Austrian provinces and regions.

2.3. Market actors

Besides the market actors described above (in chapter 2.2) the following companies have been identified to be involved in the biodiesel demand and supply chain in Austria.

On the supply side the following actors have been identified:

- Local associations of farmers providing raw materials for the production of biodiesel
- ÖKOSERVICE, a non profit organisation in Graz, is offering the possibility to collect used cooking oil from gastronomes directly. Also private households are supplied with collection pails to collect used oil and dispose it at ÖKOSERVICE. The benefit that they do not have to care about the disposal of the collected oil provides an additional incentive for private households and gastronomes to collect the used oil.
- Some Austrian municipalities offer the service to collect used cooking oil from private households directly.
- The Austrian Biofuels Institute is an international centre of competence for the development of fuel standards and quality management programs

⁸ Source: Eltis Case Study on Biodiesel production in Graz
http://www.eltis.org/study_sheet.phtml?study_id=1170&lang1=en

3. Consultation key actors

3.1. Consultation process

The local working group for Austria is not a consistent group which is composed of the same members all the time. This is due to the approach which has been chosen for Austria resulting in a variation of participants depending on the region.

The working method for the working group depends on the needs and the status-quo of each region. Usually the working method includes consulting for setting up services and concepts with alternatively propelled vehicles, providing information about the availability and benefits / disadvantages of various fuel types, and the possible CO₂ savings.

The contacts made during the consultation process by FGM-AMOR cover many different actors: FGM-AMOR has contacted small and large municipalities and their representatives (e.g. majors, vehicle fleet managers), small and locally acting vehicle manufacturers and well established mass vehicle manufacturers, tourism associations, governmental institutions (e.g. environmental agency, tourism resort), nature park administration, rental companies for cars, energy agencies, and public and private fleet operators. This included for examples mailings to municipalities to inform about the consultation offer. In total more than 300 people / municipalities were reached with these actions. Articles in local newsletters have been published (e.g. the e5 newsletter, the programme for energy efficient municipalities) to reach a wider audience. For the Skiing worldcup 2013 in Schladming, a study has been for elaborated to identify CO₂ savings using alternatively propelled vehicles for the transportation of guests and athletes.

Additionally fleet operators of municipal or public fleets have been contacted by:

- A mailing to 80 fleet operators offering consultation services
- 7 public transport operators at the mobility summit in Straden where the project and consulting offer has been presented. In total 59 people (mainly majors of municipalities) attended the conference.
- A ship operator (Attersee Schifffahrt) and a bus operator (Postbus) have been contacted and informed about the project, invited to the LWS etc.



LWG in Bad Gleichenberg – successful presentation of e-bikes

- Several municipalities in bi-lateral discussions, among them the municipality of Kötschach Mautern, Bad Gleichenberg...
- Two fleet operators have been reached and used our services in funding engineering.
- Contact with five rental companies (Sixt, Lauda Motion, Schnedlitz, C&K Airport; Taxi 878) have been offered consultation services and were invited to participate at the LWS.

The topic of the local workshop (LWS), which was held on the 11th August 2009 in Graz, was “sustainable mobility / electric vehicles for tourism regions”. In total 14 people from municipalities, tourism regions and governmental institutions attended this workshop and participated in the discussions and also presented their projects, ideas and achievements (see list of participants in Annex).

The main topics discussed are project experiences in the field of electric vehicles for tourism regions and the effects on the regions. The participants had the wish to exchange know-how and report about their projects and implementations and learn from each other as they feel that many initiatives are set up without knowing from each other and synergy effects are not used.



Participants at the LWS held in Graz

During the first Local Workshop (LWS) held in Graz, the following barriers have been identified as limiting factors for the implementation of alternative propulsion technology:

- Lack of cooperation between national initiatives
- Political courageousness for implementations is missing
- Legal framework conditions need to be improved (e.g. restricted zones for vehicles with combustion engines)
- No mass-production electric vehicle on the market available
- No overall concepts for a whole implementation strategy for a region are available
- Image of alternative fuels (e.g. electric vehicles) in the general public is bad
- Not enough (financial) support / incentives are available for the public users / manufacturers
- Infrastructure (e.g. re-charging points) for implementation is not available

Potential successful measures to encourage greater demand:

- Awareness raising to increase / better the image of alternative propulsion
- More (financial) incentives/support for manufacturers / users
- More networking platforms / facilities are required
- Improvement of land space planning directives (e.g. building licenses for rural homes should be tightened)
- Innovative intermodal concepts to combine the usage of alternatively propelled vehicles and e.g. public transport.
- More lobbying necessary
- Development and testing of vehicles that are soon mass produced is necessary
- Trust building actions in technology and vehicles are required

In general the LWS was seen as successful and further workshops will focus on other topics and target groups but allow more time for discussions and know-how exchange. Comments from participants at the LWS are:

- The participants were quite satisfied with the topics of the workshop and highlighted in the final feedback round that their expectations (know-how exchange and networking) have been met totally.
- The only critic mentioned was the length of the event as we overrun in time compared to the time schedule and many participants had to leave for another appointment
- Networking has been a major focus of the participants although more time for know-how exchange would have been helpful
- Other actions the participants plan in the field of alternatively propelled vehicles: more networking and exchange, electric charging facilities for vehicles (customers and employees), overall concepts for municipalities for the implementation of electric vehicles, setup of new projects, and cooperation with other companies.
- The plans of the participants to work in the field of alternative propulsion have not changed after the workshop

Also lessons learned for other upcoming workshops have been prepared:

- Length of workshop was underestimated – the program needs to be tighter or time enlarged: There were too many people who wanted to exchange know how and discuss. Also the vehicle manufacturer took every chance to present his advantages.
- Cancellation of participants: There were three people who registered for the event and did not appear or cancelled their participation in the morning before the workshop started. Also a vehicle manufacturer cancelled one week before and it was not possible to find a substitute in that short time frame. As a second manufacturer agreed to participate anyhow this was not a big problem.
- Time for preparation is underestimated work load: The next workshops need to be organised faster to save hours / more open discussion less

- preparation. The time preparation for the first workshop has been underestimated (especially the coordination with other speakers)
- Moderation: It was very helpful to have a professional moderator at the workshop who is not involved in the project directly. This will also be done for the next workshops.
 - Next workshop - other focus other participant groups: The next workshops should focus on discussions and provide more time for know-how exchange; biodiesel topic other focus groups necessary – especially fleet operators necessary.

3.2. Results from consultation

The consultation process during the first phase of the project was an intensive activity for FGM-AMOR as in Austria there is not only one dedicated region to be examined and supported in the course of the BIOSIRE project. This means that many different regions had and will have to be informed about the ideas and results of the BIOSIRE project – each one of them being in a different project phase. While some regions are only starting to think about the idea to have sustainable and alternatively propelled vehicles, other regions do have already a good overview about the market and the strong and weak points of alternatively propelled vehicles, but need support for specific actions.

Therefore in Austria no clearly defined group of actors is in place, but the working groups are composed from varying actors in each of the approached Austrian regions.

Regarding the consultation with main supply side actors, it was astonishing to find out that vehicle manufacturers are still not very interested to inform whether their vehicles are suitable for the usage with biodiesel.

On the demand side municipalities and tourism regions often would like to implement new services or vehicles, but the daily business does not allow for new projects due to limited (financial) resources. Also the public opinion about alternative propelled vehicles is full of prejudices, and therefore a lot of awareness, training, and information efforts are necessary before the possible implementation of alternative propelled vehicles can only started to be thought of.

One of the main barriers identified in the LWS is that no overall concept of measures for mobility with electric vehicle for is available. Also the market does not seem to be ready to demand for electric vehicles or supply them in an appropriate quality (mass products). Of course legal aspects and incentives from the government could be improved. A detailed list of barriers can be found in chapter 3.1.

4. Market Transformation Strategy

4.1. Field of application

The geographical application field for the next phase in BIOSIRE will be the whole country of Austria. The main focus will be laid on market transformation towards an increased usage of electric vehicles as biodiesel production out of used cooking oil is already well established in Austria and it is the main strategy of various policies in Austria to foster the usage of electric vehicles. But also the topic of biodiesel and waste cooking oil will be addressed.

According to the Austrian Ministry of Transport “It is the aim to have 100,000 electric vehicles on the Streets of Austria in 2020. For 2010 a pilot trial in an urban centre is planned with 100 electric vehicles, and in 2012 already 1000 electric vehicles should be driving on the Austrian streets. In order to reach these goals, several initiatives, also on a very high level with major companies involved (e.g. Siemens, AVL, KTM, Magna, Verbund) are ongoing”⁹. As stated in the Styrian “Energy Strategy” document, “The province of Styria is also foreseeing a model-region for E-Mobility in its energy strategy policy. Furthermore subsidies for the procurement of electric vehicles (cars, bicycles and other single track vehicles) are foreseen and available. It is also the aim of the Styrian government to convert the vehicles of their own fleets to be able to use biofuels from local production and to provide an adequate network of biofuel filling stations”¹⁰.

Due to these circumstances and initiatives described above, various companies, regions and municipalities are planning to implement CO₂ saving measures in the field of mobility.

⁹ Newsletter #28/29/09 of the Federal Ministry for Transport, Innovation and Technology

¹⁰ Energy Strategy 2025 of the province of Styria
http://www.umwelt.steiermark.at/cms/dokumente/11140577_44162181/2e8c594c/Energiestrategie%20Steiermark%202025.pdf

4.2. Policy approaches

In Task 3.1.4. “Political Leadership and Policy Options” FGM-AMOR has spoken e.g. with the municipality of Bad Gleichenberg about the possibility to implement a local policy on the implementation of financial incentives for the purchasing of electric vehicles. This policy should provide financial support for the purchase of electric vehicles for their citizens (additionally to the already existing funding scheme of the province of Styria). Within the next months it might be that the municipality will issue this scheme.

On a political level FGM-AMOR has also consulted the Government of Styria by preparing a CO2 saving study if alternatively propelled transportation means are used for the Skiing Worldcup 2013 in Schladming.

Further possible regional policies and incentives that could be implemented in Austrian regions to facilitate the implementation of alternatively propelled vehicles are:

- Create financial incentives: e.g. parking fee discounts, funding for the replacement of old cars
- Retrofit or purchase electric vehicles or vehicles propelled with biodiesel for the municipal fleet
- Foster the settling of companies producing or retrofitting vehicles in the region
- Request the fulfilment of sustainable criteria for vehicles already in the tendering processes (e.g. for bus lines)
- Establish local role (e.g. major to use such a vehicle) models in combination with the policies

FGM-AMOR will act as a propagator in the promotion of potential policies in personal meetings with regions during local workshops and working group meetings.

4.3. Legal and financial issues

One of the main problems for stakeholders applying for financial aid from national sources for e.g. investment in electric vehicles or infrastructure (e.g. financial contribution to their investments by funds of the Austrian Klima:Aktiv programme), is the requirement of long-term pre-financing by the applying stakeholder: Due to very long administrative processing times, the funding money for the regions or municipalities is most times only provided years after the implementation has been finished. For example the municipality of Bad Gleichenberg has submitted the application for the municipality programme of Klima:Aktiv more than a year ago but has still not received any information whether it will receive national funding.

In the LWS the following legal framework conditions have been identified that might need changes:

- More incentives for users but also manufacturers / developers are required
- More legal restrictions should be put in place to favour the usage of electric vehicles

5. Planning of next phase

5.1. Tasks

According to the DoW the tasks to be performed within the next project-phase (3.2.) include the following steps:

- T.3.2.1. Develop a demonstrator specific business model
- T.3.2.2 Analysis of policy options
- T.3.2.3 Marketing plan for target groups
- T.3.2.4 Tailor financial incentives
- T.3.2.5 Analysis of legal implications
- T.3.2.6 Planning of Local working group meetings and workshops
- T.3.2.7 Promotion towards final users
- T.3.2.8. Preparing the Roadmap for changing behaviour

In principle the Austrian approach will be based on the tasks described in the DoW, but due to the fact that FGM-AMOR is addressing the whole of Austria as a demonstrator region, it will not be possible to perform all these tasks in the detailed way as the other demonstrators plan to do it. The actions planned for the various regions in Austria will involve the activities described in the next paragraphs.

All Klima:Aktiv municipalities for which a funding has been requested will be contacted to offer these services. Additional marketing actions (e.g. at local working groups and workshops) will contribute to support demonstrator regions. Also a stronger cooperation between the Klima:Aktiv programme coordinators and the BIOSIRE project is planned.

A major focus will be laid on supporting the target groups (e.g. municipalities / tourism regions / transport operators) regarding the local demonstration programme during different phases of the implementation (from the planning phase to the finalisation). This includes studies and relevant documentation covering technical, strategic, economical and normative issues of the whole value chain for the implementations of sustainable mobility measures and usage of vehicles. Also the legal implications of the measures will be taken into account.

Furthermore support in marketing of the implemented measures will be offered to the various regions, in order to promote the offer implemented to the final users and attract new users. This will involve dissemination actions but also strategic questions e.g. recommendation of suitable financial incentives to be defined from the region or obtained from the national government or other public (e.g. European Union) or private sectors to

ensure sustainability of the measures and permanent change in travel behaviours and procurement behaviours.

In order to fulfil the tasks described above FGM-AMOR will host (three) local working group meetings and (two) workshops involving the different target groups within the regions and municipalities. The topics to be discussed will cover all relevant aspects taking into account the current state of the demonstrators. Possible topics for LWS will be electric bicycles and a workshop to identify why biodiesel is not popular to be used in fleets.

Furthermore within Task 3.2.8 (Roadmap-for-changing-behaviour) a general guidance document will be elaborated for Austria. The document will have a scientific background but will also contain information for practical application (e.g. possible roadmap suggestions for municipalities and fleet operators). It will be targeted at municipalities and fleet operators wanting to implement a sustainable fleet project using alternative fuels but also to fuel producers and the industry/OEM.

5.2. Roles and responsibilities

The general role of the parties involved in Austria in the next project phase (phase 3.2. "Market Transformation") is outlined below.

FGM-AMOR as local demonstrator leader will further push the implementation of sustainable transport means by the following actions:

- Inform target groups (e.g. municipalities, tourism regions, transport operators) about the BIOSIRE project and its outcomes, and about the benefits of alternatively propelled vehicles for tourism regions during local working groups (LWGs), personal meetings and events
- Support during and after the implementation, and promotion of the measures to the general public and specific target groups of the project.
- Observe the market of tourism and alternatively propelled vehicles in Austria to provide best support to the target groups
- Obtain information about the local implementations for evaluation purposes

Local actors / municipality / tourism association representatives, etc. will:

- Follow their programmes for sustainable mobility
- Receive input from the BIOSIRE project and adapt their concepts accordingly, if suitable for them.

5.3. Timing of activities

The Market Transformation phase has the following time plan:

WP 3: Implementation	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30
	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb
3.2 Market Transformation																		
3.2.1 – 3.2.5 Analysis																		
3.2.6 Local working group meetings (LWG)	X				X					X				X				
3.2.6 Local consultation workshops (LWS)						X								X				
3.2.7 Promotion to final users																		
3.2.8 Roadmap for Changing behaviour																		

Annex

Registered Participants of LWS, August 2009, Graz

Name	Company	Organisation Type
Ms. Christine Siegel	Mayor of Bad Gleichenberg	Municipality
Mr. Wolfgang Hafner	Environmental Office of the city of Klagenfurt	Municipality
Mr. Ernst Nussbaumer	Energy Agency of Enns Grimming Land representing the municipalities in the political district of Liezen	Municipality
Mr. Stephan Maurer	Regional Manager of Werfenweng	Municipality
Mr. Martin Beermann	Joanneum Research – representative of the municipality of Kötschach Mauthen	Municipality
Mr. Wolfgang Blaschek	Greendriving	Vehicle Manufacturer / Seller
Mr. Alexander Ebner	Landesenergieverein	Energy Agency
Ms. Birgit Baumgartner	Energy Agency of Graz, representative of the ElmoSt (Electric mobility of Styria) Initiative	Energy Agency
Mag. Roland Sint	Tourism Office of Velden	Tourism Association
Mr. Jakob Wild	Almenlandbüro Fladnitz/Teichalm	Tourism Association
Ms. Monika Hödl	Tourism Association of Bad Gleichenberg	Tourism Association
Mr. Wilfried Weigend	E-Werk Franz Graz-Gösting	Energy Provider
Mr. Christian Wolf	Energie Graz GmbH	Energy Provider
Mr. Gerfried Cebrat	FGM-AMOR	Electric vehicle user
Ms. Ingrid Briesner	FGM-AMOR	Moderator
Ms. Iris Pein	FGM-AMOR	BIOSIRE Project Leader