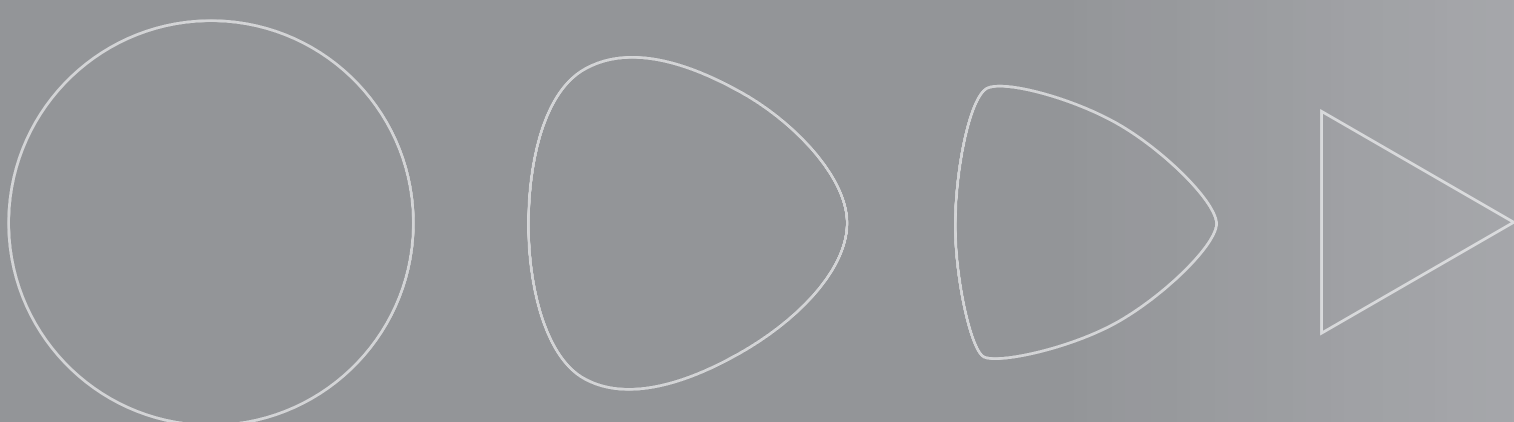
A3PS

Rethinking Propulsion.

Eco-Mobility 2025^plus

Roadmap



October 2015

Eco-Mobility 2025^plus

A3PS Technology Roadmap for the Successful Development and Introduction of Future Vehicles and Energy Carriers

Preface

As representative of the responsible Austrian Federal Ministry for Transport, Innovation and Technology (bmvit), I would like to take the opportunity to add some thoughts to this roadmap.

The automotive industry – or more precisely – Austrian automotive supply industry represents a significant value for the Austrian gross national product. Austria exports higher values in automotive parts and components than it imports in new, complete vehicles. The automotive sector has the highest share of researchers – about 14%.

To secure Austria's competitiveness in this field and to support the successful market launch of innovative, advanced vehicle technologies, a closer collaboration between the automotive and energy supply industry and Austrian research institutions was initiated. Under the auspices of the Austrian Federal Ministry for Transport, Innovation and Technology, the A3PS was founded in 2006 as a new PPP model to support an active technology policy of the ministry and to strengthen Austria's R&D activities in the field of the automotive supply industry.

Since its foundation, A3PS has developed into a well-established organization, serving as a reliable intermediary between public and private interests to research for a clean, sustainable, affordable and safer mobility.

To reach a common understanding of key future developments of automotive technologies and to transform it in a long-term funding program with industry and research institutions to complete fiercely for the best projects developed in a major success story for our country.

Over the years, A3PS established a broad portfolio of services for its member institutions. One of these services is the "Roadmap Eco-Mobility 2025plus" which aims to represent Austria's well-founded expertise in the broad field of advanced vehicle technologies and energy carriers. It also provides a comprehensive perspective on future vehicle technology trends and required R&D activities.

I look forward to the continuation of this fruitful cooperation between bmvit and the members of A3PS and I invite all interested Austrian, European and international institutions to join us on the way to a cleaner and more efficient mobility in the future.

Yours sincerely,

Ingolf Schädler

Deputy Director General for Innovation Policy,
Austrian Federal Ministry for Transport, Innovation and Technology, Vienna

A3PS – Austrian Association for Advanced Propulsion Systems

The goal of A3PS is to enforce R&D and innovation in the area of advanced propulsion systems and energy carriers as well as the storage for mobile applications. In order to introduce them onto the market successfully, A3PS utilizes the following objectives and tasks:

► **Cooperation**
Regularly joint activities to enable cooperation and common projects for member institutions

► **Networking**
Stimulating R&D cooperation in embedding the Austrian industry and research institutions into new national and international value chains in leading positions

► **Information**
Strengthening the competence of Austrian enterprises and research institutions by collecting, compiling and disseminating information on advanced propulsion systems and new energy carriers and informing the public about the potentials of advanced propulsion systems and energy carriers

► **Competence Presentation**
Presenting Austria's technology competence at national and international conferences and initiatives

► **Representation of Interests**
Supporting the representation of Austrian interests in international committees and initiatives of the EU and the IEA

► **Orientation**
Establishing a common view between industry, research institutions and technology policy by developing a common strategy, roadmaps and position papers for reinforcing technology development

► **Advisory function**
Providing fact-based consultancy and recommendations for policy makers to support the optimization of their policy instruments (funding programs, regulations, standards, public procurement, etc.) and informing the public of the opportunities and perspectives of these new technologies

Executive Summary

From A3PS members' point of view, besides individual customer needs, the main drivers for the development of future vehicle technologies will be environmental aspects (emissions and efficiency) as well as the future target of zero fatalities in road transport.

The clear specifications of environmental and energy policy for the drastic reduction of emissions of greenhouse gases and toxic substances as well as the increase of energy efficiency and the share of renewable energy sources will, in the coming decades, cause the development of a multitude of advanced propulsion technologies and fuels, which optimally correspond to the respective application purpose and vehicle class. In the interest of sustainability, this diversification of propulsion systems should also generate economic and social benefits in addition to the ecological ones. The A3PS members have summarized these power train technologies with the term "eco-mobility". Finding cost-effective methods for the production of small quantities through series production and intelligent industrialization is a fundamental requirement in order to make the forthcoming diversification also an economic success.

Suitable technologies range from advanced thermodynamic power train technologies including the use of renewable fuels, to hybrid drives, to pure electric drives with batteries or fuel cells. Advanced thermodynamic as well as hybrid power trains which are both already available in the short term, will also maintain a significant share of the market in the medium and long-term. Besides the optimization of each single component, the integrated view of the overall vehicle plays a major role in the optimization of energy efficiency and emission behavior.

The internal combustion engine (ICE) will remain the dominant power unit in the period covered by the roadmap and still there is a lot of potential for further improvement for both diesel and gasoline engines. Even where zero emission requirements are concerned, there is a potential for ICE to comply. Due to the large number of vehicles on the market, advanced thermodynamic power trains can make a significant contribution to achieving CO_2 and emission goals. The high research and development (R&D) demand for further optimization steps in internal combustion engines is of essential economic importance for Austria.

Electric power trains (including fuel cell power trains) are characterized by a very high "tank/battery"-to-wheel efficiency, the potential for zero local emissions, and a totally new driving experience. A special role in hybrid systems can be predicted for the upcoming 48V systems, especially in smaller passenger cars which are produced in high numbers under extraordinary price pressure. The transmission assumes greater importance than ever before with the increasing electrification of the power train. Full integration of all electric components into the transmission ("hybrid transmission") is a trend.

The very promising potentials of electric power trains are in contrast to a considerable need for R&D in order to ready these technologies for the market. For this purpose, the focus must especially be placed on the optimization of key components such as batteries or fuel cells and the reduction of expensive raw materials. Further challenges are the supply from renewable energy sources and the development of the required charging and hydrogen refueling infrastructure.

The market introduction of fuel cell vehicles by OEMs started in selected regions in 2014. Activities must now be further pursued and results must be transferred to the international markets. Through the early market launch, A3PS members expect even tougher international competition. Therefore, strong R&D efforts on fuel cell components as well as test and validation systems are required in order to strengthen Austria's position in this field.

Aside from advanced power train technologies, "Advanced Power Train Integration Technologies on Vehicle Level" such as energy harvesting, cabin heating and air conditioning systems, regenerative braking systems and control units (xCU) considerably influence the vehicle performance, fuel consumption, efficiency and environmental impact. Furthermore, advanced development tools & methodologies are required to reduce development time and cost while improving quality.

Since the majority of all accidents are caused by the human element factor, advanced vehicle control systems have the potential to avoid those accidents and therefore save human lives. Experts in automated driving around the globe expect a dramatic reduction of vehicle collisions, accidents and fatalities once these functionalities are deployed into most of the vehicles on road. The fact that worst case crashes will happen at a significantly lower velocity compared to today, will finally result in radical new vehicle concepts with less energy consumption and better driving performance.

By gradually taking over the driver's tasks, fully automated vehicles will be the logical extension of advanced vehicle control systems in the long term. The technology path for those systems leads from advanced vehicle control systems via connected vehicle technologies to fully automated driving. Required vehicle technologies lie in the field of extensive sensor technologies, vehicle-to-vehicle (V2V) and vehicle-to-infrastructure (V2I) communication, electrically actuated and electronically controlled components (x by wire), positioning and mapping, as well as predictive operation and control strategies. These technologies, on the other hand, will result in increased demands on complex control architectures and data information management. In a last step, all traffic participants need to be integrated into a common control concept in the long term, which will require increasing activities in the vehicle's field of full integration into infrastructure guidance systems.

An important opportunity for Austria will be the development of appropriate testing infrastructures for power trains, connectivity and vehicles. Last but not least, a major role for the successful implementation of automated driving vehicles will pose organizational and legal challenges (e.g. Vienna Agreement) in order to clarify the responsibilities between the driver, vehicle and the infrastructure.

Transportation biofuels will continue to play a central role in the long term, due to their high energy density, the use of the existing refueling infrastructure for liquid and gaseous biofuels as well as their relative simple use in internal combustion engines, and due to the potentially significant reduction of greenhouse gas emissions. Priority will be given to heavy duty long-distance transport, where battery electric vehicles will not be deployed from today's point of view. R&D is required for technological optimization of biofuel production and the mutual adaptation of engine and biofuels. When it comes to environmental effects, taking a life cycle perspective is essential, considering not only greenhouse gas emissions, but also aspects such as land use, water use, food and feed production and biodiversity for cultivation in sensitive regions.

Renewable hydrogen has a unique position due to diverse generation paths and due to its storage capability as a chemical energy carrier, which is the main benefit compared to electric power. R&D is required for technological optimization of decentralized renewable hydrogen generation. Hydrogen for transport requires large-scale build-up of a new refueling infrastructure which is a great financial challenge for the energy supply industry.

Due to the diversity of power trains, energy supply chains and the related bandwidth of environmental effects, the potential future contribution of transportation systems to the improvement of sustainability (including economy, environment and society) must be evaluated on a scientific and robust basis. Life cycle thinking therefore needs to become an intrinsic perspective of OEMs and energy suppliers already during the research and development phase of eco-efficient and sustainable transport systems.

In order to successfully overcome the hurdles on the path to eco-mobility, this roadmap stresses the following requirements on technology policy:

- ► Long-term commitment of public support is required
- ► Funding along the entire innovation cycle
- ► Technology-neutral, results-oriented calls
- ► Support of cooperative interdisciplinary R&D projects
- ► Strengthened international cooperation in R&D
- ► Acceptance of partners from foreign countries into funded projects
- ► Improved review process with feedback after the completion of the project
- ► Subsidies for establishing companies and stimulation of venture capital

This roadmap offers an overview of the intended R&D activities and development focal points of Austria's industry and research in the coming years. Additionally, it has led to a valuable exchange of information between the experts of the A3PS members. Besides the development of a common view on the anticipated technological development paths, it also has enabled specific perspectives for future cooperation of the members in new R&D consortiums.

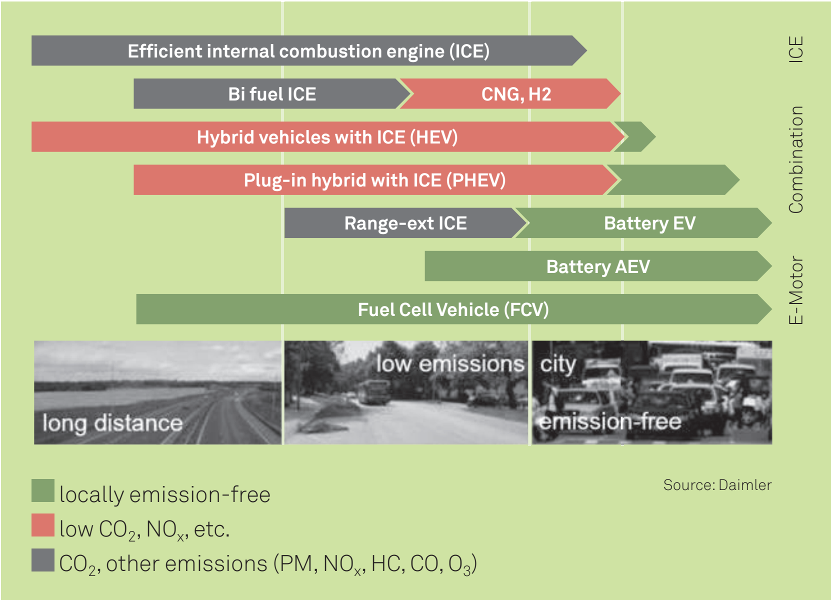
Introduction

Requirements on future vehicles will become more demanding than ever before. On the one hand they will need to comply with stringent future emission regulations (e.g. EU6c) under more challenging conditions (WLTP, RDE). On the other hand it seems to be certain that the European legislature will head for CO_2 emission targets between 68 and 75 g/km in 2025. Additionally, social aspects which are difficult to predict such as changing consumer behavior or new mobility concepts must be taken into account. From the present A3PS members' point of view, future vehicles will be driven by aspects as summarized below:

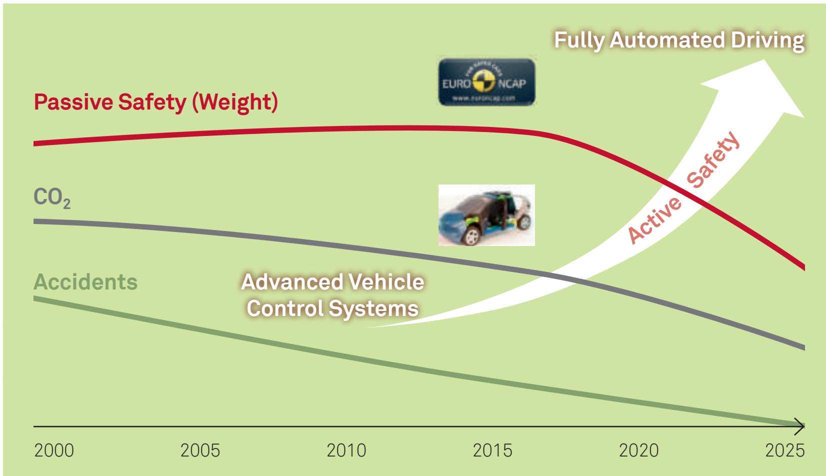
- ► Environmental impact
- ► Efficiency
- ► Safety (zero fatality)
- ► Demographic change
- ► Limited fossil fuels and raw material shortage

Those drivers, in the short and medium terms, will cause the development of a variety of alternative vehicle technologies and fuels, which optimally correspond to the respective application purpose and vehicle class as assumed in the figure below.

The A3PS members have summarized this variety of technologies with the term "eco-mobility".



Besides energy efficiency and emissions, zero fatality must be a goal. From today's perspective, this scenario can only be achieved by a combination of passive safety measures and advanced vehicle control systems. Finally it could lead towards fully automated driving. This approach, not only to minimize the consequences of accidents (passive safety) but also to avoid accidents at all, offers the opportunity to reduce the amount of materials and weight needed for passive safety measures. Therefore radical new lightweight vehicle concepts can be realized in the long term.



Source: A3PS

Less weight and improvement of safety through advanced vehicle control systems

In summary, in order to comply with future targets, eco-mobility vehicles will be characterized by:

- Less emissions
- Increased energy efficiency
- Nearly crash-free vehicle movement on roads/zero fatality
- New, radical changes of vehicle concept towards lightweight structure
- Comfort improvement
- More coordinated (synchronized) vehicle movement at optimal speeds
- Better utilization of existing infrastructure capacity on roads (as well as parking facilities)
- New concepts for cargo mobility and mobility for individuals

In addition to the benefits listed above, the diversification of power train technologies should also generate economic and social benefits. The Austrian automotive (supply) industry is an important sector of the national economy, as it counts 30,000 employees (with a market of over 13.8 bn. EUR) and 70,000 in the directly connected surrounding sectors (with a market of 21.5 bn. EUR). The export rate in the automotive sector is about 90% and, of all the industry sectors, the automotive sector has the highest share of researchers – about 14%.

Source: Fachverband der Fahrzeugindustrie Österreichs

Austria's industry and research institutions have a high level of competence in the field of advanced power train and vehicle technologies as well as energy carriers. In order to keep this strong position and increase added value, it is important to take advantage of the opportunities of these new technologies without delay. Therefore, a coordinated approach between industry, research institutions and technology policy as well as a common view is necessary. For the preparation of the roadmap, all A3PS members as well as interested parties in the various areas were included. Especially in the newly added field of advanced vehicle control systems, several companies were identified and invited to participate.

The aim of this roadmap is to point out promising technologies and measures in the following fields:

- Power train technologies
- Overall vehicle technologies (including advanced vehicle control strategies)
- Fuels
- Life cycle assessment

All technologies and measures mentioned in the following chapters are of high relevance to the Austrian industry and research institutions. Activities in these areas are currently ongoing or at least planned.

In the following chapters the technologies and measures are being evaluated regarding the following criteria:

- Pollutant emissions and noise
- Potential to reduce CO_2 emissions and the dependency on fossil energy carriers
- Added value
- R&D demand for successful implementation on the market
- Safety*
- Security*

Measures for commercial vehicles (including heavy duty, buses and off-road) are highlighted in the respective tables and described in separate text passages.

In each of the following chapters, the information is summarized in two types of tables. In a first overview, all technologies, including their market maturity, are shown.

The second type of table shows each technology in far more detail, including aims and specific measures. For each measure, the TRL (Technology Readiness Level) was assessed from the current perspective in accordance with the list below:

- **TRL 1** – Basic principles observed
- **TRL 2** – Technology concept formulated
- **TRL 3** – Experimental proof of concept
- **TRL 4** – Technology validated in lab
- **TRL 5** – Technology validated in a relevant environment (industrially relevant environment in the case of key enabling technologies)
- **TRL 6** – Technology demonstrated in a relevant environment (industrially relevant environment in the case of key enabling technologies)
- **TRL 7** – System prototype demonstration in an operational environment
- **TRL 8** – System complete and qualified
- **TRL 9** – Actual system proven in an operational environment (competitive manufacturing in the case of key enabling technologies)

Source: Horizon 2020 - Work programme 2014-2015, Annex G: Technology readiness levels (TRL)

* only for "Advanced Vehicle Control Systems"

Furthermore, the respective technologies are evaluated on the basis of benefits and the R&D demand as well as the type of (research) project required in order to bring the technologies onto the market.

The "Type of Project Required" in the following technology tables serves as important orientation in the development of new funding instruments. The projects mentioned are categorized according to the *community framework for state aid for research and development and innovation (2006/C 323/01):*

- **'Fundamental Research'** means experimental or theoretical work undertaken primarily to acquire new knowledge of the underlying foundations of phenomena and observable facts, without any direct practical application or use in view.
- **'Industrial Research'** means the planned research or critical investigation aimed at the acquisition of new knowledge and skills for developing new products, processes or services or for bringing about a significant improvement in existing products, processes or services. It comprises the creation of components of complex systems, which is necessary for industrial research, notably for generic technology validation, to the exclusion of prototypes as covered by 'Experimental Development'.
- **'Experimental Development'** means the acquiring, combining, shaping and using of existing scientific, technological, business and other relevant knowledge and skills for the purpose of producing plans and arrangements or designs for new, altered or improved products, processes or services. These may also include, for example, other activities aimed at the conceptual definition, planning and documentation of new products, processes and services. The activities may comprise producing drafts, drawings, plans and other documentation, provided that they are not intended for commercial use.
- In addition, **'Demo'** projects with the aim of demonstrating the day-to-day utility of advanced vehicle technologies and/or advanced energy carriers with national and international visibility.

Power Train Technologies

All advanced power train technologies covering power units, energy storages as well as transmissions are considered in the following three chapters. Optimizing thermodynamic power train technologies still contains significant potential for further improvement, especially in the operation with renewable fuels. The electrification of the power train has the highest potential to meet future CO_2 targets. It offers high energy efficiency and considerable environmental impact, using electricity from renewable sources.
In addition, with the upcoming EU6c Emission Regulation in 2017, three major changes/challenges will be introduced:

- More dynamic driving cycle (WLTP instead of NEDC) with a higher load/speed profile
- Real Driving Emissions (RDE) as an additional type approval requirement
- Same particulate limits (PN) for gasoline and diesel direct injection engines

Advanced Thermodynamic Power Train Technologies

There is a global consensus that the internal combustion engine (ICE) will remain the dominant power unit in the period covered by the roadmap. Current spark (gasoline) and compression ignition (diesel) engines are already highly efficient compared to their theoretical potential. However, there is still a lot of potential for improvement. Fuel consumption can be further reduced by 20% or more with additional variability, mechatronic subsystems and the application of new materials for further friction reduction. **This means, a peak efficiency of 50% is a realistic long-term target for both the diesel as well as the gasoline ICE.**

Special attention needs to be paid to local emissions, since they are the root cause of all traffic restrictions in urban areas. The main focus needs to be on NOx and particulate matter limits. Even where zero emission requirements are concerned, there is a potential for ICE to comply with these.

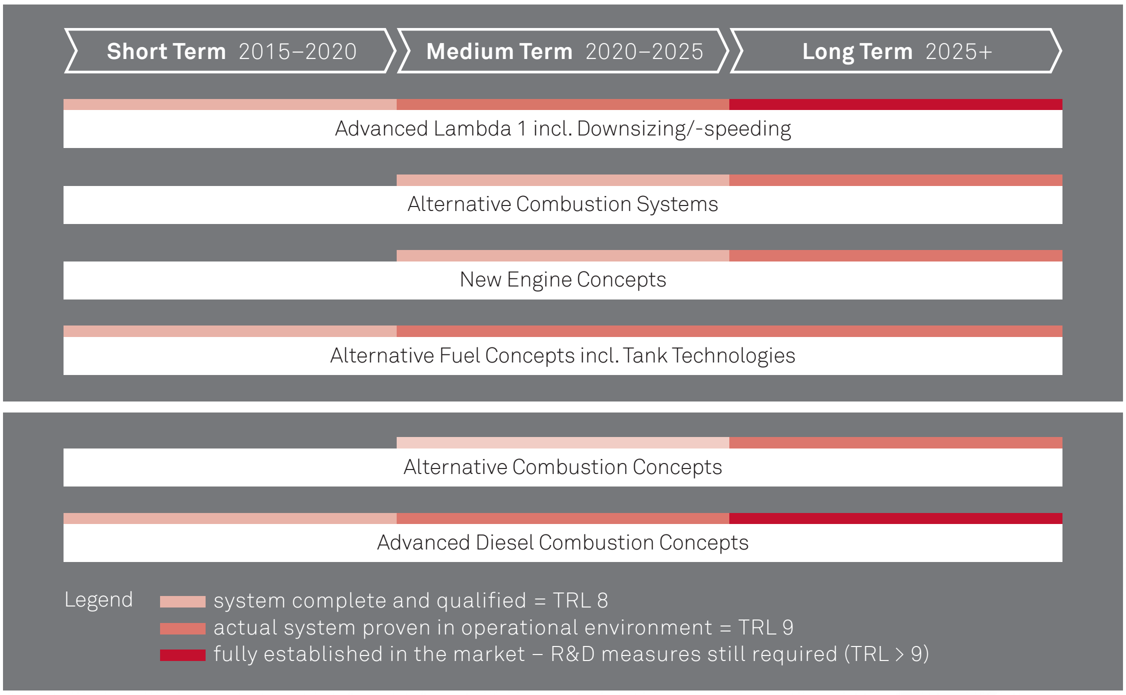
Aside from toxic emissions, the most stringent challenge is the European CO_2 legislation which demands 95g CO_2/km by mid of 2020. This target can hardly be achieved with conventional power train technologies. It is anticipated that measures like extreme downsizing and downspeeding are required for heavier vehicles to come closer to this target. When pursuing this path, efforts have to be strongly concentrated on supercharging of these engines to maintain acceptable driving performance.

Besides the optimization of each single component, it should be mentioned that the integrated view of the overall vehicle plays a major role in the optimization of energy efficiency and emission behavior.

The main development routes are:

- High variability (variable compression ratio, CNG and LNG operation)
- Alternative combustion systems
- Downsizing/downspeeding (high R&D demand for super charging in order to maintain drivability)
- Exhaust gas after treatment (focus on $DeNO_x$ catalysts, PF)
- Structural optimization (new materials, advanced joining technologies, high-strength functional materials)
- Advanced micro hybrid systems (e-boosting, KERS, improved ultra-caps)
- Minimization of friction losses (new materials and surface structures)
- Thermal management (reduction of heat losses, waste heat recovery)
- Transmission optimization (high reduction gears, friction alternative lubricants, clutch & actuators, axle drive incl. differential)
- Development tools and methodologies (simulation & control platform/development)

The high R&D demand for further optimization steps in internal combustion engines is the main business foundation of A3PS member organizations and is therefore of essential economic importance.



Market Readiness of Advanced Gasoline Engine Technologies

Market Readiness of Advanced Diesel Engine Technologies

Advanced Gasoline Engines

Further optimization of the gasoline engine is aimed at reducing fuel consumption while complying with emission legislation (i.e. passenger cars EU6c in WLTP/RDE, two-wheeler EU4).

The EU6c will especially be a challenge for gasoline engines with direct injection. For these engines, limits on particulate numbers will be the key challenge for further development and more capable technologies. This demand can lead to the requirement of particulate filters for gasoline direct injection engines.

Gasoline engines operated with alternative fuels such as natural gas/biogas and H_2 gas blends can reduce CO_2 emissions significantly. In addition, biogas has the potential to be produced locally in Austria. With appropriate engine modification, adjustments to the engine management, the tank and the fuel system, engines can be operated by all aforementioned fuels and their blends in the so-called multi fuel operation. Multi fuel engines have the full potential to reduce pollutants and CO_2 emissions with relatively small additional R&D effort.

The use of biogas which is locally produced in Austria has an even higher potential to reduce CO_2 emissions by the theoretical “closed CO_2 loop”. CNG storage systems have already been introduced onto the market, but still have potential for improvement in terms of weight and cost reduction.

For commercial vehicles, storage technologies for Liquefied Natural Gas (LNG) as well as technologies for methane conversion at low temperature levels play a major role.

However, with an already advanced development level, further attempts face increased R&D costs. Austrian companies have built up considerable know-how with the technologies mentioned in the following table and cooperate with OEMs and domestic research institutions.

Advanced Diesel Engines

The main challenge of diesel engines is to comply with NO_x and particulate emission legislation. Therefore, further development in aftertreatment of exhaust gases is required. Especially selective catalytic reduction technology (SCR) and $DeNO_x$-storage catalyst technology need to be addressed.

In the engine system, optimizing gas exchange, EGR and the combustion processes can reduce exhaust emissions. Downsizing is effective not only for gasoline engines but also for diesel engines. Limits are set by increased NO_x emissions at higher downsizing rates. All technologies for further optimization of the diesel engine are characterized by relatively strong R&D efforts.

In the field of heavy duty vehicles and buses, optimized diesel engines and natural gas engines are considered relevant impellent technologies. The technologies presented in the table are allocated to these two categories.

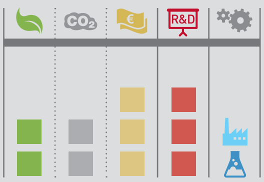
Meeting emission legislation is the main challenge of diesel engines also in commercial vehicles. Optimized combustion processes in combination with aftertreatment of exhaust gases aim to reduce fuel consumption and emissions. Emission targets are realized by very complex but also extremely effective systems for aftertreatment of exhaust gases such as improved SCR and advanced diesel particulate filter (DPF) technologies.

Short Term 2015–2020 | **Medium Term** 2020–2025 | **Long Term** 2025+

Advanced Gasoline Engines

Advanced Lambda 1 incl. Downsizing/-speeding

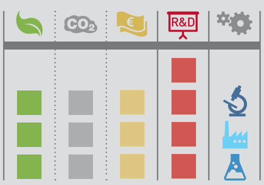
real world efficiency (fleet fuel consumption, 95 g CO_2/km in 2020)



- downsizing rate > 0.7 **TRL 5-8**
- downspeeding **TRL 8**
- gas exchange/EGR optimization **TRL 7-8**
- auxiliaries on demand **TRL 7-9**
- turbocharger concepts **TRL 7-9**
- optimization of structure **TRL 7-9**
- driveability (NVH) **TRL 7-9**

Alternative Combustion Systems

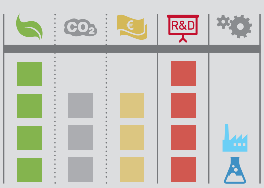
EU6 and RDE



- advanced control **TRL 2-7**
- exhaust gas aftertreatment ($DeNO_x$, PF) **TRL 5-9**
- charge exchange/EGR optimization **TRL 6-9**
- next generation advanced fuels **TRL 2-4**
- variable valve timing - flexible cylinder charge **TRL 4-7**
- next generation of ignition systems **TRL 2-5**

New Engine Concepts

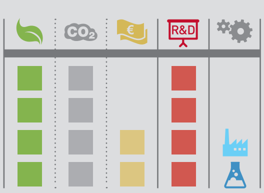
EU7-EUx and significant efficiency improvement (η >50%)



- high-pressure direct injection **TRL 3-6**
- multiple injection **TRL 5-7**
- new procedure at warm-up **TRL 4-6**
- variable compression ratio **TRL 2-5**
- reduction of friction losses **TRL 4-9**
- reduction of heat losses **TRL 1-4**

Alternative Fuel Concepts incl. Tank Technologies

emission & WTW-Zero-CO_2 efficiency



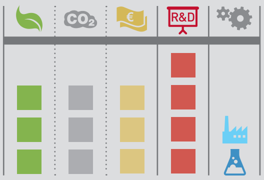
- increased/variable compression **TRL 3-7**
- on-board reforming **TRL 3-5**
- multi fuel ability **TRL 6-9**
- direct injection **TRL 5-7**
- optimization of combustion process **TRL 7-8**
- material research **TRL 3-5**
- catalyst development **TRL 3-5**
- natural gas blends in ICE **TRL 5-7**
- advanced gas combustion systems **TRL 2-4**
- LNG-storage technologies (cost, lightweight constructions) **TRL 5-7**
- methane conversion at low temperature levels **TRL 7-8**

Short Term 2015–2020 | **Medium Term** 2020–2025 | **Long Term** 2025+

Advanced Diesel Engines

Alternative Combustion Concepts

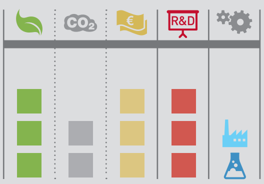
emissions (NO_x, particle)
efficiency (η >50%)



- variable compression **TRL 2-4**
- partially or fully pre-mixed combustion (e.g. HCCI) **TRL 2-4**
- new engine designs **TRL 1-3**
- variable valve timing **TRL 4-6**
- fully flexible injection systems **TRL 2-5**

Advanced Diesel Combustion Concepts

EU6 and RDE
further fleet CO_2 reduction



- exhaust gas aftertreatment and EGR optimization ($DeNO_x$, DPF) **TRL 5-9**
- multi stage charging **TRL 5-7**
- downsizing **TRL 7-8**
- continuous improvement of injection systems **TRL 7-8**
- advanced, model based control **TRL 5-8**
- exhaust gas aftertreatment: SCR/sulphur compatible **TRL 8**
- exhaust gas aftertreatment: optimization of material and cost **TRL 6-7**
- EUx with efficiency improvement **TRL 7**

Legend

Benefit

- emission reduction (incl. noise)
- CO_2 & resources*
- added value

R&D demand

Type of project required

- (material) fundamental research
- industrial research
- experimental development
- demonstration

Technology readiness levels (TRL)

TRL 1: basic principles observed
TRL 2: technology concept formulated
TRL 3: experimental proof of concept
TRL 4: technology validated in lab
TRL 5: technology validated in relevant environment
TRL 6: technology demonstrated in relevant environment
TRL 7: system prototype demonstration in operational environment
TRL 8: system complete and qualified
TRL 9: actual system proven in operational environment

* potential to reduce CO_2 and to raise independency from fossil resources

Cross-Cutting Technologies

The following technologies are relevant for the optimization of both, gasoline and diesel engines as well as the overall advanced gasoline or diesel power trains.

Market Readiness of Cross-Cutting Technologies

Minimizing friction has a high potential to reduce CO_2 and even pollutant emissions. Therefore, a strong effort in basic materials research is required. Advanced Start/Stop systems can be further improved by optimizing generator and direct start systems which will be available on the market shortly. Waste Heat Recovery uses the ICE's residual heat to reduce energy consumption by 3%. On the other hand a very high level of R&D effort is required.

Even for engine design, lightweight design and materials will play a major role. High-strength materials and in the long run, materials with special thermal properties (low thermal conductivity and capacity), will be introduced.

New "breakthrough" materials will make it possible to develop new, highly efficient engines, for example, utilizing significant higher compression ratios. An important aspect of using new materials is the consideration of the entire product life cycle, including recycling. In order to gain an advantage in know-how, Austria must keep a close collaboration with industry and university research institutes in the field of basic material research. Optimized development tools and methodologies that allow a flexible deep dive in the level of detail during the development process are required in order to reduce development time and cost whilst improving quality. Electrified, demand-driven auxiliary components can further improve efficiency and reduce CO_2 emissions. The first systems, such as pumps and compressors, have already been partially introduced to the market and further developments are being promoted.

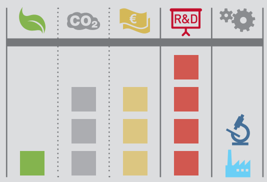
The transmission still has some noteworthy optimization potential, particularly in terms of friction reduction, thermal management and converter optimization (automatic transmission).

Short Term 2015–2020 | **Medium Term** 2020–2025 | **Long Term** 2025+

Cross-Cutting Technologies

Minimization of Friction Losses

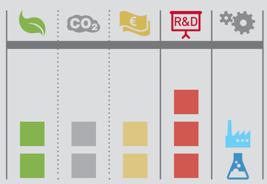
efficiency



- alternative lubricant **TRL 2-4**
- material coating **TRL 3-5**
- new materials (e.g. plastics) **TRL 1-3**
- new bearings with new materials **TRL 3-7**
- surfaces structuring (nano structures) **TRL 2-6**
- on demand control of auxiliaries **TRL 6-9**

Advanced Micro Hybrid Systems

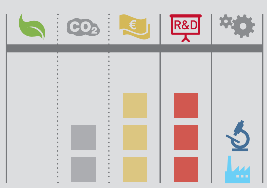
CO_2/efficiency



- e-boosting **TRL 5-6**
- kinetic energy recovery storage (KERS) **TRL 5-6**
- optimizing generator and direct start systems **TRL 5-6**
- advanced start/stop systems **TRL 6-7**
- improved ultra capacitors **TRL 6-9**

Thermal Management

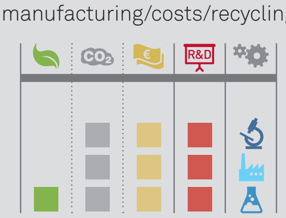
emissions/efficiency



- waste heat recovery (e.g. ORC) **TRL 3-4**
- thermal and thermo-electrical systems **TRL 4-5**
- reduction of heat losses and heat storage **TRL 2-5**
- thermal/steam processes (Rankine) & thermal-electric conversion **TRL 5-7**

Lightweight Construction/ Materials

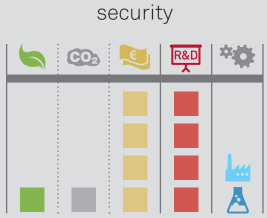
efficiency/mass reduction/ manufacturing/costs/recycling



- new advanced joining technologies **TRL 3-4**
- LCA **TRL 6-7**
- high strength functional materials for engines, transmissions and electrical components **TRL 2-5**

Development Tools & Methodologies

time to market/cost/safety/ security



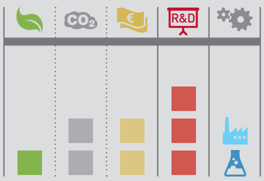
- simulation & control platform/simulation & development **TRL 2-5**
- testing systems and measurement technique/manufacturing, EoL testing **TRL 3-5**
- e.g. simulation on molecular level for after treatment **TRL 2-3**
- model based development tools (joint virtual & real world tools) **TRL 3-7**
- real time models for XiL-development **TRL 2-6**

Short Term 2015–2020	Medium Term 2020–2025	Long Term 2025+

Cross-Cutting Technologies

Auxiliary Units

efficiency/safety/
increased functionality

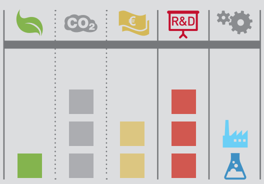


- electrical & demand orientated components (e.g. pumps & compressors, air conditioning compressor, water-/fuel pump) **TRL 6-8**
- advanced control strategies **TRL 5-7**
- improved efficiency & power density (red. spec. weight) **TRL 5-8**

Transmission

Transmission

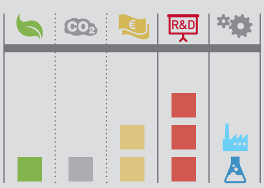
efficiency/weight reduction/
durability/advanced
functionality/noise reduction



- CVT, DCT, MT, AT, AMT, TC **TRL 5-7**
- high reduction gears (e.g. planetary gear) **TRL 5-6**
- optimization of friction/thermal management/converter optimization **TRL 4-5**
- alternative lubricant, component integration hybrid transmission **TRL 2-5**

Clutch & Actuators

efficiency/durability/
heat resistance/
control strategy/safety



- friction material **TRL 4-5**
- fluids **TRL 4-6**
- electro-magnetic systems **TRL 2-5**
- alternative clutch types with higher efficiency and better durability **TRL 6-8**

Axle Drive incl. Differential

efficiency/weight/durability/
safety/noise reduction

- advanced pinion technologies (e.g. outside diameter reduction) **TRL 2-4**
- differentials **TRL 5-6**
- multi purpose fluids **TRL 4-6**
- sealing/bearings **TRL 3-5**

Legend

Benefit

- emission reduction (incl. noise)
- CO_2 & resources*
- added value

R&D demand

Type of project required

- (material) fundamental research
- industrial research
- experimental development
- demonstration

Technology readiness levels (TRL)

TRL 1: basic principles observed
TRL 2: technology concept formulated
TRL 3: experimental proof of concept
TRL 4: technology validated in lab
TRL 5: technology validated in relevant environment
TRL 6: technology demonstrated in relevant environment
TRL 7: system prototype demonstration in operational environment
TRL 8: system complete and qualified
TRL 9: actual system proven in operational environment

* potential to reduce CO_2 and to raise independency from fossil resources

Electric Power Train Technologies

Compared to thermodynamic power train technologies, electric power train technologies are characterized by a very high "tank/battery"-to-wheel efficiency and the potential for zero local emissions. Additionally, hybrid and pure electric power train technologies enable a totally new driving experience regarding driving behavior and performance. These advantages justify high R&D effort. Although the basic technologies are developed and already available on the market, great efforts are needed to make these technologies affordable. This means high investments in optimization steps, especially in new development methodology, production technologies, modular design systems and application of less expensive materials. Only if these vehicles can be offered at reasonable prices, can larger quantities be sold, thus leading to a considerable environmental impact.

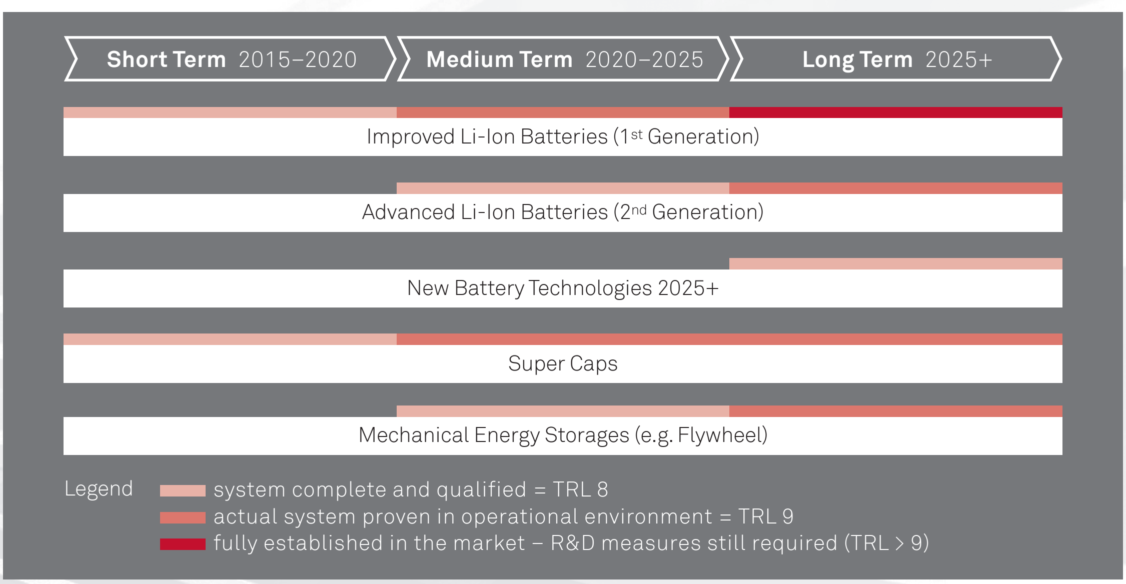
In this chapter, technologies for hybrid and battery electric vehicles are considered. Due to the fact that industry and research institutions treat fuel cell power trains differently than those on hybrid and electric vehicle technologies, fuel cell technologies are dealt with in the following chapter – though fuel cell vehicles are, technically speaking, hybrid electric power trains. Due to the higher battery capacity within the hybrid electric vehicles, the highest potential regarding CO_2 and emission reduction is shown by the plug-in hybrid electric vehicle (PHEV). However, in order to realize the full potential of plug-in hybrid and battery electric vehicles (BEV), a sufficient charging infrastructure must be available and the use of renewable electricity is assumed, which both require a highly committed technology policy. Furthermore, due to high power demand, PHEV and BEV need high voltage levels of at least 400V for peak performance.

In the field of heavy commercial vehicles and buses, the relevant power train concepts are depot-bonded battery electric vehicles and hybrid vehicles. Depot-bonded vehicles legitimate the pure battery-electric operation in the heavy-duty and bus sectors because the distances covered are calculable in both course and length. Depot-bonded vehicles in urban use with intensive stop and go traffic have an advantage in pollutants and emissions due to the potentially higher braking energy recovery. However, the use of heavy battery electric vehicles for long distances does not make sense from today's perspective.

Energy Storages

The table below shows the main energy storage technologies for electric power trains. Regarding energy density and cost, battery technologies are the key drivers for the success of hybrid and pure electric vehicles. Experts predict that energy density will double and costs will be cut in half by 2020. The positive environmental effects of battery electric vehicles are even bigger than with hybrid electric vehicles. Nickel-metal hydride battery (NiMh) and Lithium-ion battery (Li-ion) technologies permeate the market but will be replaced in the long-term by advanced Li-ion batteries. This will require continuous R&D effort. New battery technologies such as metal-air batteries (Sulfur-Air, Mg-Air, Li-Air, redox flow) with even higher energy and power densities as well as highly integrated batteries will penetrate the market in the long run.

In special cases, mechanical energy storages (e.g. flywheels) and super caps can achieve similar effects as batteries. Due to the complex system, high R&D effort is required before mechanical/fluid-mechanical energy storage can be successfully introduced onto the market.



Market Readiness of Energy Storage Technologies

In the past years, batteries for automotive applications have been improved tremendously, however further improvement is still necessary. The aim for all battery technologies is improving energy content at a higher voltage level, power-to-energy-ratio and integration, reducing costs whilst increasing efficiency, durability (cycle stability) and safety.

Additionally, as batteries in automotive applications are relatively new, there are several approaches for achieving the same objective. For example, established car manufacturers have the ambitious demand to fulfill automotive safety requirements not only on a system level but also on a cell level. On the other hand, recently established battery electric vehicle manufacturers have developed methods to obtain the same level of safety only on a systems level, using consumer electronics battery cells (with lower safety requirements).

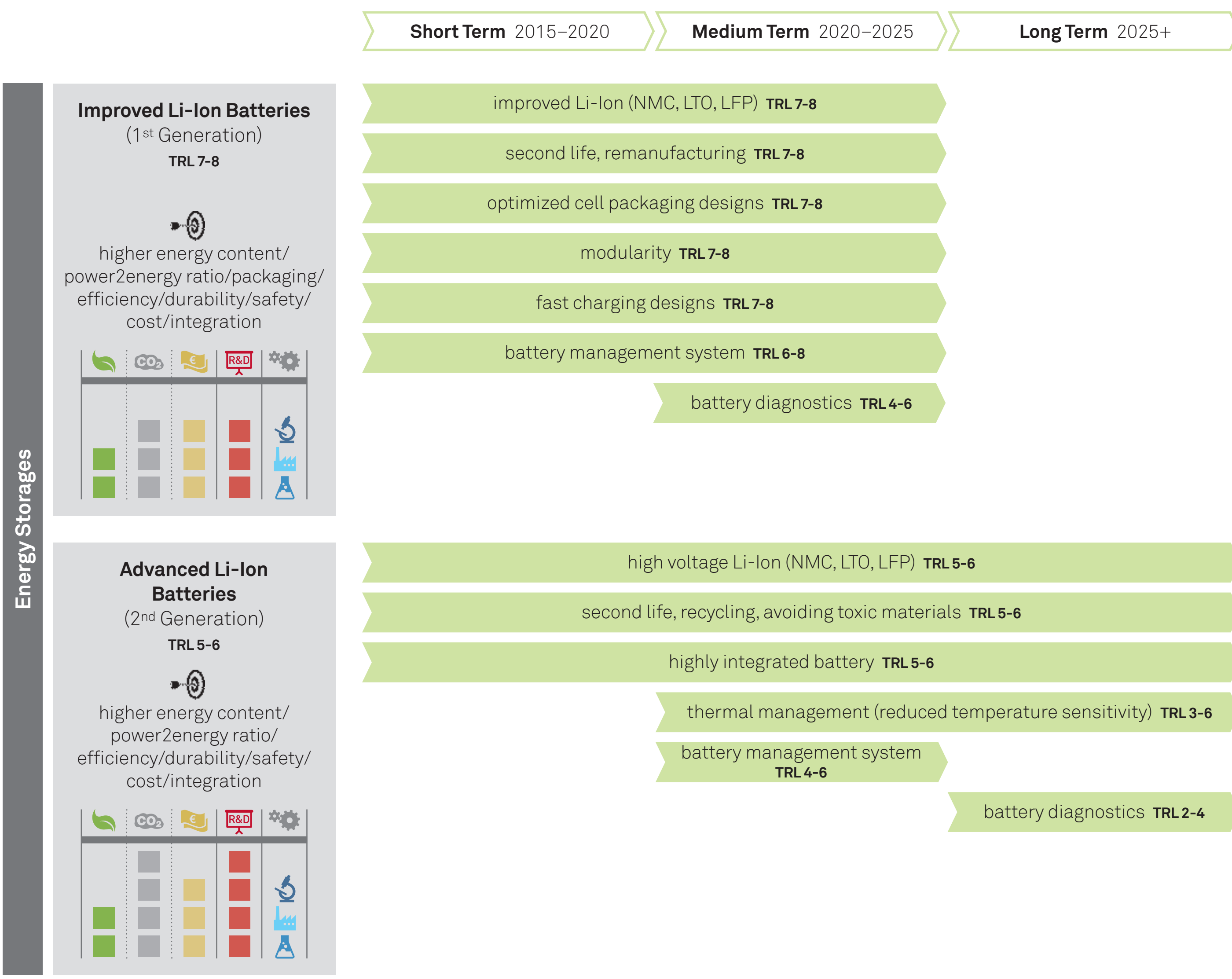
In addition to the measures shown in the table, key activities in R&D for all battery technologies are concentrated in the areas of:

- Modeling and simulation
- New statistical methods
- Material research
- Cycle stability

Advanced mechanical and chemical modeling methods and simulation tools allow conclusions from battery cell level to systems levels and therefore can save time considerably during the development process. The main difficulty lies in the proof of scalability for chemical simulation methods. As a parameter variation results in complex and time-consuming tests, new statistical testing methods are required in order to reduce effort for battery testing. Additionally, expert knowledge is rare in this field, which could be a great opportunity for Austrian industry and R&D institutions. Experts predict a high potential for material research, which may improve basic characteristics of future batteries.

"Advanced Li-Ion batteries" and "new battery technologies" require disproportionately high R&D efforts in order to achieve the theoretical, "large benefits".

A very strong R&D effort, especially for the replacement of rare earth elements, is expected. Therefore, the focus is on new electrode materials for "New Battery Technologies" as well as "Super Caps".



	Short Term 2015–2020	Medium Term 2020–2025	Long Term 2025+

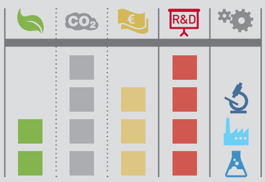
Energy Storages

New Battery Technologies

2025+

TRL 1-3

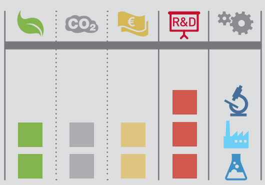
higher energy content/ power2energy ratio/efficiency/ durability/safety/cost/ integration/resource availability



- air metal batteries, Mg-Ion batteries (high energy applications-range) **TRL 1-3** (Medium Term – Long Term)
- redox flow **TRL 1-3** (Medium Term – Long Term)
- highly integrated battery **TRL 1-3** (Medium Term – Long Term)
- thermal management **TRL 1-3** (Long Term)
- battery management system **TRL 1-3** (Long Term)
- battery diagnostics **TRL 1-3** (Long Term)

Super Caps

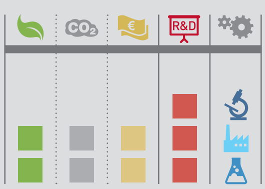
reduce cost/raise energy density/durability/integration



- material of electrodes (graphene, carbon nanotubes, 3D-meshes, etc.) **TRL 1-3** (Short Term – Long Term)
- hybrid capacitor (Li-Ion) **TRL 6-8** (Short Term – Medium Term)
- material of electrolyte (high voltage capability) **TRL 4-6** (Short Term – Medium Term)

Mechanical Energy Storages (e.g. Flywheel)

reduce cost/raise energy density/integration



- rolling bearing technology (lifetime) **TRL 3-5** (Short Term – Medium Term)
- magnetic bearing technology (cost, size) **TRL 3-5** (Short Term – Medium Term)
- advanced materials (CFRP, carbon nanotubes) **TRL 1-4** (Short Term – Long Term)
- electric machine (high speed, losses) **TRL 7** (Short Term – Medium Term)

Legend

Benefit

- emission reduction (incl. noise)
- CO_2 & resources*
- added value

R&D demand

Type of project required

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- industrial research
- experimental development
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Technology readiness levels (TRL)

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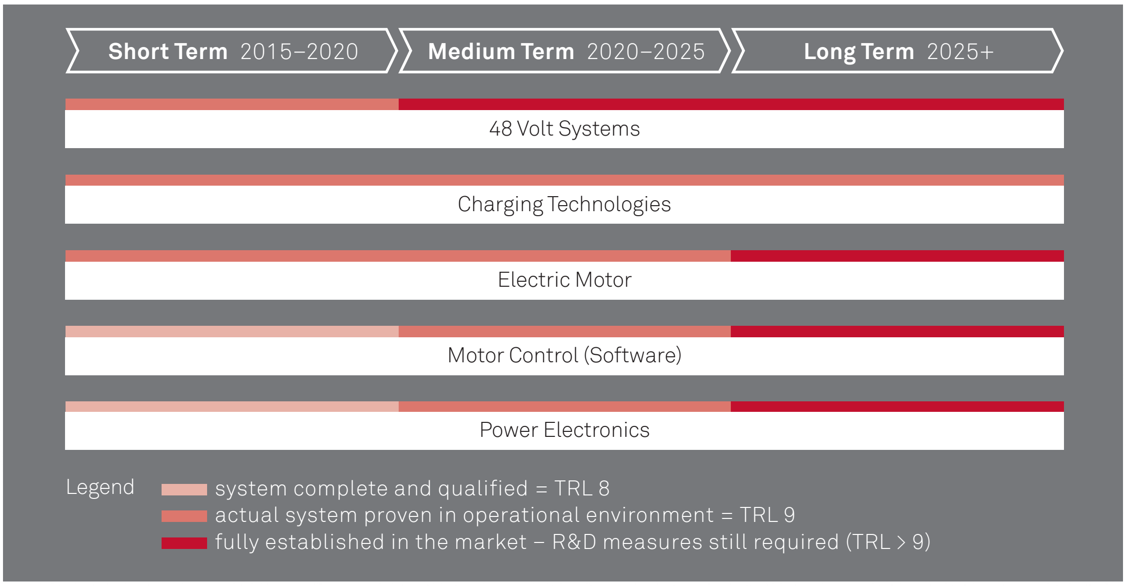
* potential to reduce CO_2 and to raise independency from fossil resources

Electric Components

Technologies for the electric components of electric power trains are listed in the table below.

Market Readiness of Electric Component Technologies



A special role in hybrid systems can be predicted for the upcoming 48V systems, especially in smaller passenger cars which are produced in high numbers under extraordinary price pressure. These vehicles cannot afford highly sophisticated and expensive hybrid systems. Therefore, cost efficient hybrid systems based on 48V could be an attractive solution in this segment. The main advantage of 48V systems is that 48V systems do not require touch protection measures which are prescribed by law for systems over 60V.

Micro hybrid systems using 12V systems cannot provide sufficiently effective environmental benefits, as the achievable power levels up to 3-4 kW are not sufficient for electrical cruising or regenerative braking. So 48V systems which provide power levels up to 8 to 10 kW – recently reported up to 30 kW, thus already reaching the mildly hybrid area – promise to provide remarkable fuel consumption or CO_2 reductions in functions such as regenerative braking. ICE assist via electric supercharge technologies or even the so-called “sailing” which becomes possible at these power levels. A cost-effective solution is to implement Belt-Starter-Generator (BSG). A further benefit can be created by “phlegmatizing” the ICE dynamics, the so-called “peak shaving”.

It is also anticipated that in the future, luxury cars will use a 48V board net voltage as auxiliary comfort systems are reaching their limits with 12V systems.

For both applications, the introduction of 48V systems requires extensive research in the development of 48V components such as e-motors and inverters based on different technologies compared to the high voltage systems used in “big” hybrids. Especially the fusing and switching technology of the still relatively high currents is a big challenge. The development of 48V system components as bridge technology for pure electric vehicles offers a good business opportunity for the Austrian industry.

The development of efficient charging technologies is critical to the success of battery electric vehicles. Conductive charging systems (with plugs) are available and have already been partially introduced to the market. Inductive charging is seen as a medium to long-term charging technology. Since the efficiency of such systems is still too low and the effects of magnetic fields on the human body and the environment is still unknown, further investigation and R&D effort is needed. Battery swapping systems require a high level of standardization, which affects OEMs in their freedom of design and requires a high number of circulating batteries. With an increased number of batteries, the constant availability of charged batteries is seen as a financial and logistical challenge. Cost and image are serious hurdles as long as warranty jurisdiction is not legally clarified in the EU. Consequently, for A3PS members, battery swapping systems are not worthwhile for common use, from an environmental or technological perspective. Nevertheless, the short time required to swap batteries is very attractive compared to on board battery charging especially for fleet vehicles running in a limited/protected environment. The production of battery and charging systems has a high potential to create added value in Austria.

Fast charging (charging at a high current) is another technology to shorten the charging time. However, fast charging significantly reduces the energy efficiency of the charging process, while also reducing the durability of the battery, and it presents major challenges to satisfy the high power demand and the stability of the grid. A3PS members do not plan any major R&D activities for the period of the roadmap. However, fast charging technologies help to meet users' range anxiety, even though field tests show that users rely only to a rather small extent on fast charging because they tend to charge their vehicles at home or work.

Large effects in terms of pollutants, CO_2 and added value can be achieved by further developments of the electric motor. Advanced magnetic flux control can further improve efficiency and power density of electric motors. Highly integrated electric motors with speeds greater than 20,000 rpm provide the required performance with less weight and space requirements and help to avoid or replace 2 stage transmissions. The R&D effort is strong, as all mechanical components (bearing, seal, magnet fastening, etc.) are at an early stage of development for automotive use. In addition, key areas of motor development are low or non-magnetic concepts, thermal stability and special transmission solutions coupling the motor and ICE, as well as functional safety of all components.

Regarding "Motor Control and Diagnostic Software", the aims are fast parameterization, enhanced modularization and increased safety features. Therefore, significant R&D effort is necessary for advanced, model-based modeling such as easy self-learning, and adaptive and flexible algorithms.

The term "Power Electronics" summarizes the converter, DC-DC converter and on-board charging unit. Short-term activities primarily relate to increased efficiency, miniaturization and new cooling concepts with special emphasis on "high temperature" cooling. New materials, "self-learning" inverters and high volume production will minimize costs in the medium and long term and create added value. Great R&D efforts in manufacturing processes are necessary to tap the full added value potential in Austria.

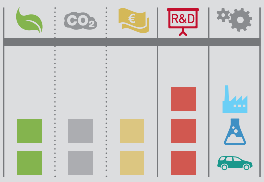
Further, cost reductions are necessary in the production of the electric power train components, allowing for a high number of end users to afford and utilize the benefits of these technologies, and thereby to magnify the positive environmental impacts. Such technologies can only become widespread as the costs of these systems drop. Applied research and development in these areas, especially in the field of production technologies, continue to be required.

Short Term 2015–2020 | **Medium Term** 2020–2025 | **Long Term** 2025+

Electric Components

48 Volt Systems

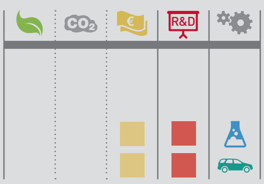
cost/efficiency/functionality



- electric motors **TRL 7-8** (Short Term)
- inverters **TRL 7-8** (Short Term)
- fuse and switching technology **TRL 7-8** (Short Term)
- actuators and electric valves (e.g. for ICE) **TRL 7-8** (Short Term)
- DC-DC converter **TRL 6-9** (Short Term)
- control and diagnostics **TRL 6-9** (Short Term)

Charging Technologies

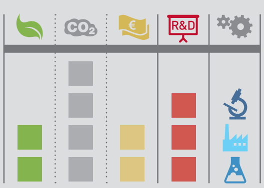
efficiency/user friendly/safety



- conductive charging **TRL 7-8** (Short Term)
- inductive charging **TRL 5** (Short Term – Long Term)
- battery swapping systems **TRL 6-7** (Medium Term – Long Term)

Electric Motor

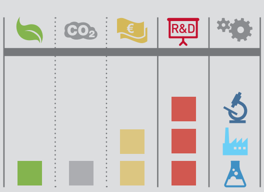
efficiency/cost/safety/reliability/high volume production/thermal stability



- advanced magnetic flux control **TRL 7** (Short Term)
- new sensor technologies **TRL 5** (Short Term – Medium Term)
- speeds > 20.000 rpm (bearing, seal, magnet fastening) **TRL 3-5** (Short Term – Long Term)
- low-count or non-permanent-magnet concepts **TRL 4** (Short Term – Long Term)
- lightweight wheel hub motors **TRL 4** (Short Term – Long Term)

Motor Control (Software)

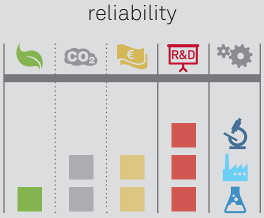
fast parameterization/modularization/safety



- advanced modeling (easy self learning, adaptive, flexible) **TRL 3** (Short Term – Long Term)
- data analysis/state monitoring **TRL 3** (Short Term – Long Term)
- model based control and diagnostics **TRL 2-4** (Medium Term – Long Term)

Power Electronics

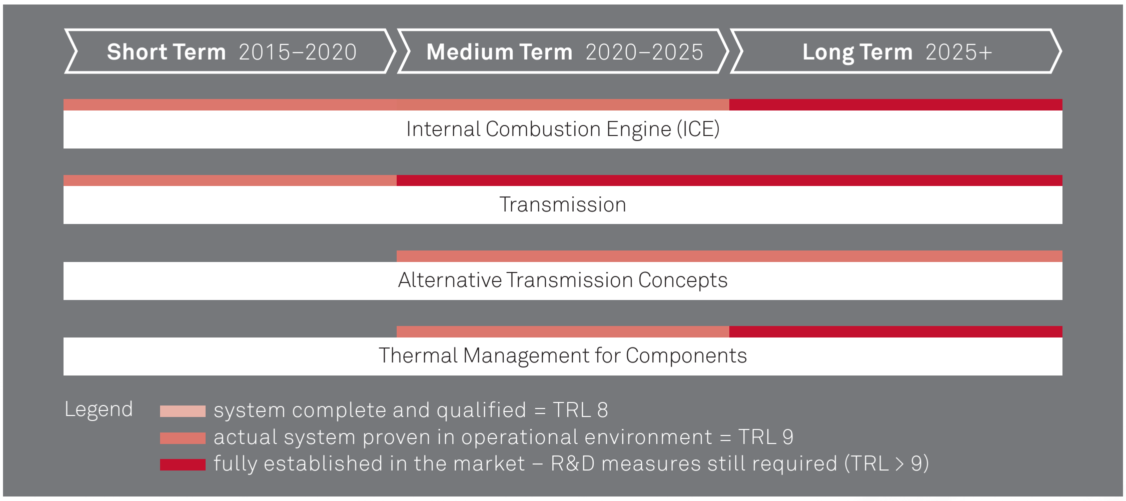
efficiency/cost/safety/reliability



- integration in motor or battery **TRL 7** (Short Term – Long Term)
- new semiconductor switches (cost efficient, life time on semiconductor level) **TRL 3** (Medium Term – Long Term)
- capacitors (high temperature capacity, space requirements) **TRL 5-6** (Short Term – Long Term)
- assembling and joining technologies **TRL 6** (Short Term – Medium Term)
- functional integration (active HV-discharge, high speed safety) **TRL 6** (Short Term – Medium Term)
- self-learning converter/new materials **TRL 4** (Short Term – Long Term)

Internal Combustion Engine, Transmission and Thermal Management

The table below summarizes main technologies for the ICE, required in hybrid electric vehicles, for transmission concepts and the topics for "Thermal Management for Components".



Market Readiness of ICE, Transmission and Thermal Management Technologies

Since the ICE is operated in a substantially different way (peak shaving, load point shifting, start/stop…) in a hybrid compared to a pure thermodynamic power train, the special adaptation of existing combustion engines or the use of alternative combustion engines allows for a further reduction of emissions and fuel consumption. Conventional gasoline or diesel engines are only the short-term choice. For the medium and long term, alternative approaches (modified combustion processes such as Miller/Atkinson) or even alternative engine concepts with small displacement for use in range extender applications, are promising options.

In the field of commercial vehicles, the R&D focus is on diesel and natural gas engine concepts, some of which have already been launched and will permeate the market in the medium term.

The transmission is becoming more important with the increasing electrification of the power train than ever before. Full integration of all electric components into the transmission (hybrid transmission) is a trend. Since the electric motor must be operated at high speeds (= high power density), new efficient and silent reduction gearing to the axle is required. A so-called hybrid transmission fulfills the function of an actuator to operate the ICE and electric motor in parallel and/or serially. The R&D effort and the added value in mass production are high. Fuel consumption can be reduced by up to 15% by optimizing the interaction between transmission and the overall power train.

To reduce noise emissions from the ICE (in hybrid electric vehicles) and transmission, acoustics R&D will continue to play an important role.

Due to their heavy weight, truck transmissions need to deal with much higher torques in both directions at higher numbers of transmission steps compared with passenger cars, making the integration of an electric motor more difficult. The R&D effort is particularly high, since durability and reliability expectations require more extensive testing than in passenger car applications. Austria's added value in this area mainly lies in the development of complete transmission systems (transmission, electric motor, inverter, clutch) with associated actuators and operating strategy.

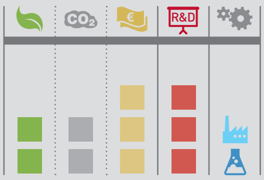
Thermal management affects both the operating conditions for individual components and the comfort in the cabin. Cabin heating and cooling under extreme environmental temperatures can significantly reduce a (electric) vehicle's range. In some cases, for example in city traffic, the energy demand for heating can exceed the demand required for propulsion. New solutions for heat storage systems are of particular interest. Unused heat can be stored and effectively used at a later time (e.g. waste heat of power train components for interior heating the next day). Chemical heat storage systems (with no insulation requirements and indefinite storage duration) have the highest priority. Such storage systems are available at a basic level, but a lot of R&D effort is still required. The behavior of the electric components such as batteries, inverters and electric motors are of special interest with regard to the vehicle components.

Short Term 2015–2020 | **Medium Term** 2020–2025 | **Long Term** 2025+

Internal Combustion Engine, Transmission and Thermal Management

Internal Combustion Engine (ICE)

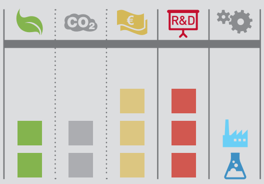
NVH-optimization/ emission/efficiency/cost



- encapsulation **TRL 7**
- thermal management **TRL 5-9**
- packaging **TRL 8**
- Miller/Atkinson **TRL 6-7**
- REX engines with limited load range incl. 1-point operation (2 wheeler, off-road) **TRL 5-6**
- alternative engine concepts for REX **TRL 4-5**
- diesel-hybrid/natural gas-hybrid **TRL 7-8**

Transmission

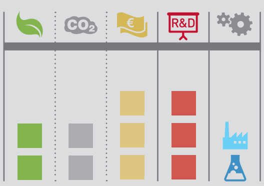
efficiency/cost/safety/ reliability/noise reduction



- bearing **TRL 6-7**
- AMT **TRL 7**
- actuators **TRL 6**
- hybrid transmission (full integration of electric components) **TRL 5-6**
- functional integration (auxiliary integration) **TRL 6**
- control systems **TRL 7**

Alternative Transmission Concepts

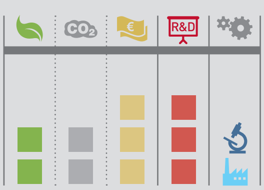
efficiency/highly integrated



- i² CVT **TRL 6-7**
- power split transmission **TRL 6-7**
- model based transmission control **TRL 3-5**

Thermal Management for Components

efficiency/performance/cost/ integration/durability



- component heat protection/waste heat recovery **TRL 6-7**
- thermal behavior electric motor, battery, power electronic **TRL 5-6**
- heat storage (thermal management of e-components) **TRL 2-5**
- innovative HVAC systems and components (combined with entire vehicle thermal management) **TRL 5-6**

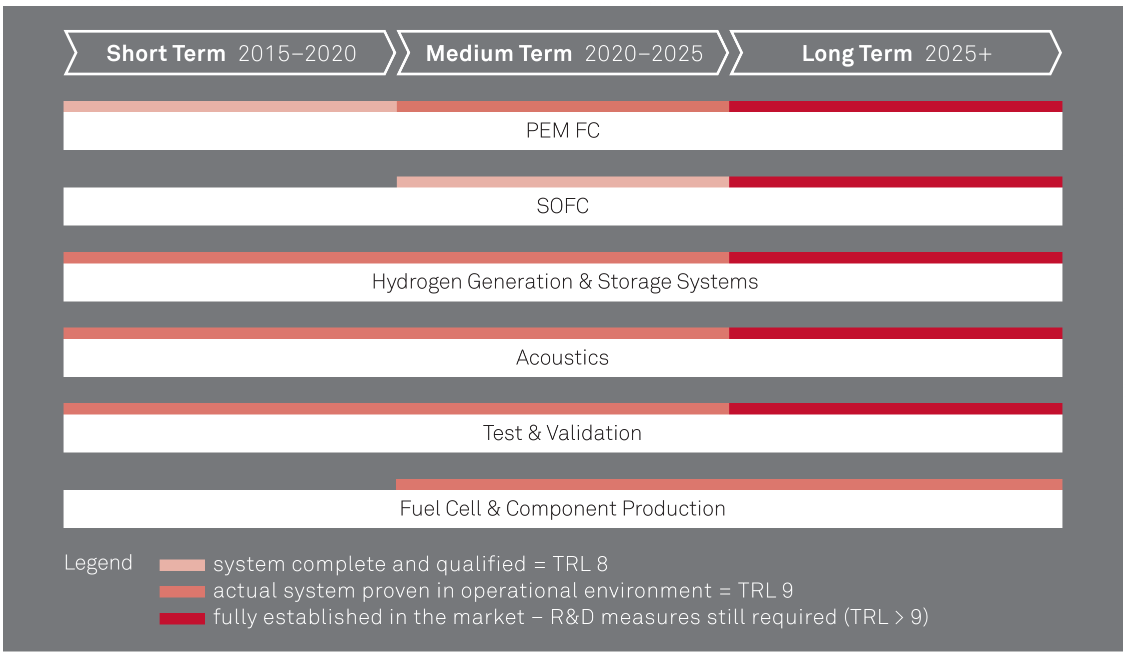
Fuel Cell System Technologies

Fuel cells (FC) have great savings potential for pollutants and CO_2 emissions – implying the usage of renewable generated hydrogen. In addition, local hydrogen production (without importing energy) is possible. A big chance for the introduction of fuel cell vehicles are synergies between the production of fuel cell vehicles and hybrid electric vehicles (e.g. between Toyota's fuel cell vehicle Mirai and Toyota's hybrid electric vehicles).

There are two main technologies of fuel cells for automotive applications. On the one hand the Polymer Electrolyte Membrane (PEM) fuel cell and on the other hand the Solid Oxid Fuel Cell (SOFC). PEM FC's distinguishing features include lower temperature/pressure ranges (e.g. 50°C to 100°C) and a special polymer electrolyte membrane. The SOFC has a solid oxide or ceramic electrolyte and operates at high temperature levels between 500°C and 1000°C. Both technologies, PEM and SOFC offer a great synergy potential with their respective electrolysis technologies, the polymer electrolyte membrane electrolysis and the solid oxide electrolyser cell (SOEC). Therefore, these technologies are also discussed in this roadmap, where necessary.

The market introduction of fuel cell vehicles by OEMs started in selected regions in 2014. Austrian companies, research institutions and universities are engaged in the fields of technologies summarized in the table below. The table shows that the activities must now be further pursued and results must be transferred to the international markets. Through the early market launch, A3PS members expect even tougher international competition.

Market Readiness of Fuel Cell System Technologies



Therefore, great R&D efforts on fuel cell components and test and validation systems are required in order to strengthen Austria's position in this field. Currently R&D activities on fuel cell components are focused on efficiency, endurance, lifetime and cost.

The large investments in high volume production required to lower the costs of fuel cell systems and therefore the price of the vehicles are the biggest obstacle for the introduction of fuel cell systems.

For the application in passenger vehicles, the focus is currently on the PEM FC. Depending on the power train design, fuel cells operate at power levels from 15 to 30 kW for range extender vehicles. APU applications and Combined Heat and Power (CHP) applications use power levels up to 100 kW and more power for "pure" fuel cell vehicles. FC range extender vehicles are battery electric vehicles with fuel cells for maintaining charge or as a fall back solution in case of a discharged battery. In "pure" fuel cell vehicles, the fuel cell provides the total amount of electrical drive energy. A small battery or so-called "super capacitors" is required to buffer highly dynamic load changes and peak performances.

Very strong R&D effort is required especially for the development of new low-cost materials with high durability under high dynamic loads for the fuel cell. With regard to the second generation of fuel cell vehicles, the focus is on cost reduction, e.g. replacement of noble metal catalysts in the fuel cell.

In order to reduce the use of the EU-defined "critical raw materials", more R&D is required in the field of lightweight powder-metallurgical manufactured SOFC stack components, qualified catalysts and high temperature electrolysis (SOEC) – for instance via low or platinum-free resources, and through recycling, reducing or avoiding the use of rare earth elements. Especially, since electrolysis is one of many ways to produce hydrogen.

As for hydrogen storage, in the first generation of fuel cell vehicles, tanks with a pressure level of 350 bar, later 700 bar are used. A very strong R&D effort is required for the development of hydrogen storage systems that reach higher energy densities while reducing cost.

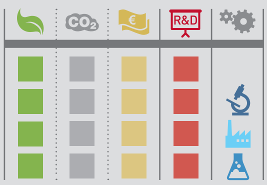
In the heavy-duty sector, the use of PEM fuel cells in city buses in particular is considered an early commercial market. In the field of heavy-duty vehicles and buses, the SOFC will be ready for the market in the short term, used as an auxiliary power unit and as a range extender. In addition, hydrogen storage and refueling will follow the new standard with a pressure level of 700 bar in the short term.

Short Term 2015–2020 | **Medium Term** 2020–2025 | **Long Term** 2025+

Fuel Cell System Technologies

PEM Fuel Cells
(for REX-FCV and "pure" FCV/synergies with PEM-electrolysis)

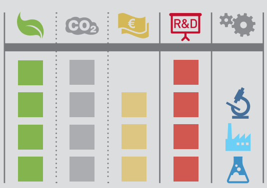
efficiency
endurance
lifetime
cost reduction



- reduction of noble metal catalysts **TRL 7**
- replacement of noble metal catalysts **TRL 3**
- innovative/cost reduced electrolytes and membranes **TRL 4**
- cold start behavior **TRL 7**
- media conditioning (e.g. charging, humidifying) **TRL 7**
- medium temperature fuel cells (>120°C) **TRL 5**
- control, diagnostics (e.g. in-situ analysis of degradation, calibration, optimization) **TRL 4-6**
- dynamic behavior (control, sensors, calibration, optimization) **TRL 7**
- specific thermal management **TRL 7-8**
- gas analytic (e.g. N_2/H_2 in anode/anode loop, CO/CO_2 at stack cathode outlet) **TRL 6**
- root cause analysis (e.g. degradation & failure detection/model based prediction) **TRL 2-6**

SOFC
(synergies with CHP and SOEC)

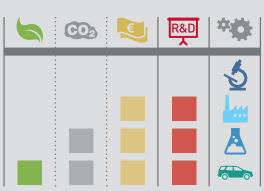
efficiency
endurance
lifetime
cost reduction



- internal hydrocarbon reforming (catalysts) **TRL 2-3**
- reduction of operating temperature of fuel processing and electrochemical conversion **TRL 1-3**
- increased syngas and methane acceptance **TRL 7**
- increased mass and charge transport (SOFC, SOEC) **TRL 2-4**
- new ionic and mixed conducting oxides (SOFC, SOEC) **TRL 2-4**
- specific gas and thermal management **TRL 4-5**
- root cause analysis, failure/degradation and diagnosis **TRL 2-6**
- metal supported cell (MSC) for APU and REX **TRL 5-7**
- MSC stack technology for APU and REX **TRL 5-6**
- powder-metallurgical manufactured SOFC stack components **TRL 6-8**
- SOFC as APU **TRL 7**

Hydrogen Generation & Storage Systems

cost/lifetime/safety/optimization of production process/weight reduction/packaging



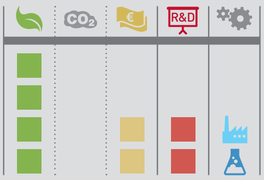
- solid state storages **TRL 3**
- ionic liquids **TRL 1-2**
- new sensor technologies for production and lifetime monitoring for components **TRL 1-2**
- new sensor technologies for lifetime monitoring for components and systems (synergies with production/model based prediction) **TRL 1-2**
- joining technology (tubes, fittings) **TRL 6-7**
- break through H_2 storage materials and concepts **TRL 1-3**

Short Term 2015–2020 | **Medium Term** 2020–2025 | **Long Term** 2025+

Fuel Cell System Technologies

Acoustics

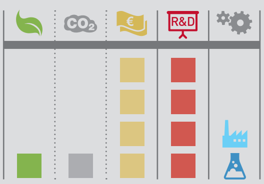
NVH optimization/ increase customer acceptance



- new technologies for APU noise reduction (e.g. compressor, pumps) **TRL 3-4**
- reduce noise during refueling (super sonic) **TRL 4-5**
- valves, pumps, blowers and power electronics for full FC systems **TRL 3-7**

Test & Validation

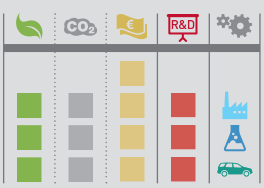
technical, ecological and economic analysis of fuel cell and hydrogen storage systems (components, systems and vehicles)



- HiL and on board real world analysis **TRL 4-7**
- long term tests under real conditions and accelerated stress tests (AST) **TRL 4-5**
- automated measurement and test environment for components and systems **TRL 5-7**
- high pressure test bed incl. refueling infrastructure **TRL 8**
- model based development incl. real xiL testing **TRL 2-5**

Fuel Cell & Component Production

cost reduction/high volume production technlogies



- OBD storage sensors **TRL 1-2**
- high volume serial production technology for components like tank valve and pressure regulator **TRL 1-6**
- valves, sensors, pumps, blowers, thermal management componenents **TRL 2-8**
- low cost cell and stack components **TRL 2-5**
- end of line test systems **TRL 3-8**

Legend

Benefit

- emission reduction (incl. noise)
- CO_2 & resources*
- added value

R&D demand

Type of project required

- (material) fundamental research
- industrial research
- experimental development
- demonstration

Technology readiness levels (TRL)

TRL 1: basic principles observed
TRL 2: technology concept formulated
TRL 3: experimental proof of concept
TRL 4: technology validated in lab
TRL 5: technology validated in relevant environment
TRL 6: technology demonstrated in relevant environment
TRL 7: system prototype demonstration in operational environment
TRL 8: system complete and qualified
TRL 9: actual system proven in operational environment

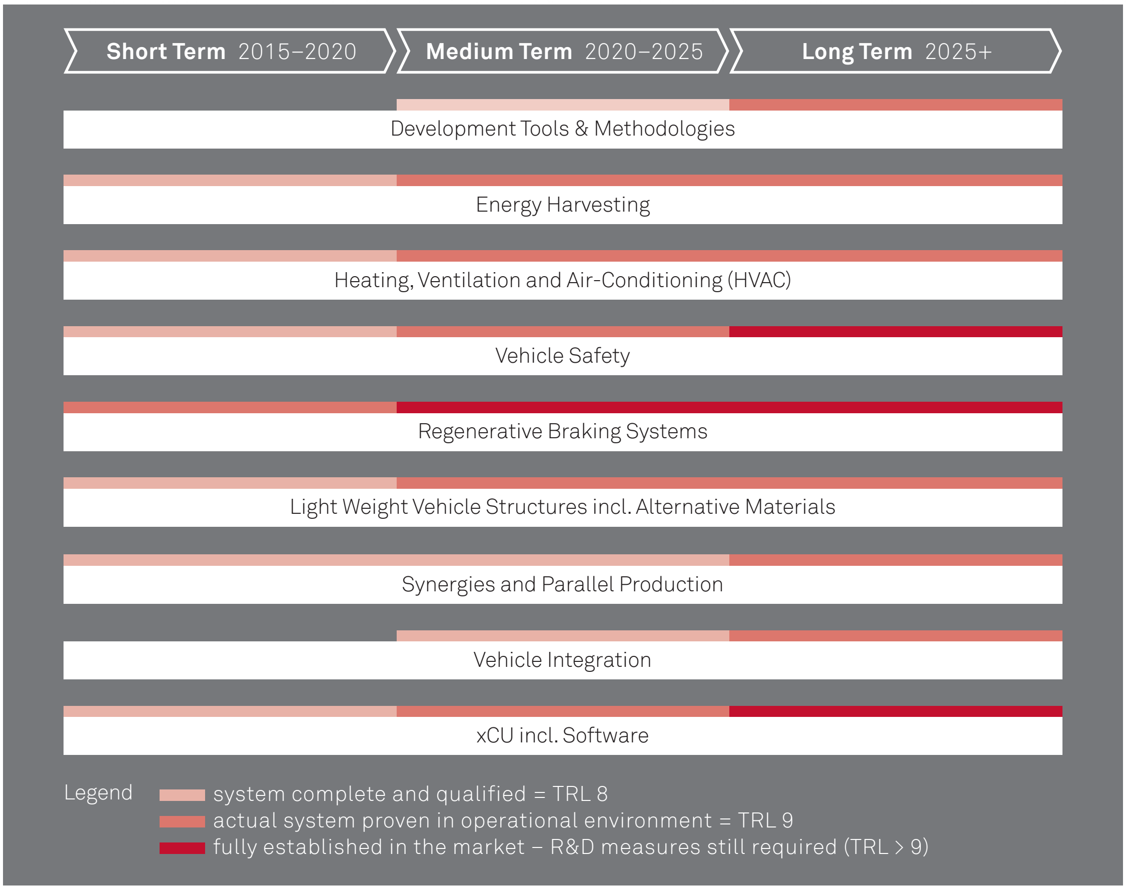
* potential to reduce CO_2 and to raise independency from fossil resources

Advanced Power Train Integration Technologies on Vehicle Level

Aside from advanced power train technologies mentioned in the previous chapters, this chapter summarizes technologies which considerably influence the vehicle performance, fuel consumption, efficiency and environmental impact. Enabling technologies for development and vehicle integration of advanced power train technologies are also included.

Starting with "Development Tools & Methodologies", the table below summarizes power train integration technologies in order to optimize energy efficiency and emission behavior, overall cost, as well as the overall vehicle safety.

Market Readiness of Advanced Power Train Integration Technologies



Advanced "Development Tools & Methodologies", i.e. special simulation tools that allow a flexible deep dive into the level of detail during the development process are required to reduce development time and cost while improving quality. Local Austrian suppliers can increase their added value.

In the field of "Energy Harvesting", the aim is mainly to increase energy efficiency by optimizing the use of available waste energy. Therefore, measures like vehicle integration, Organic Rankine Cycle (ORC) or thermoelectric generators are promising options that require a strong R&D effort.

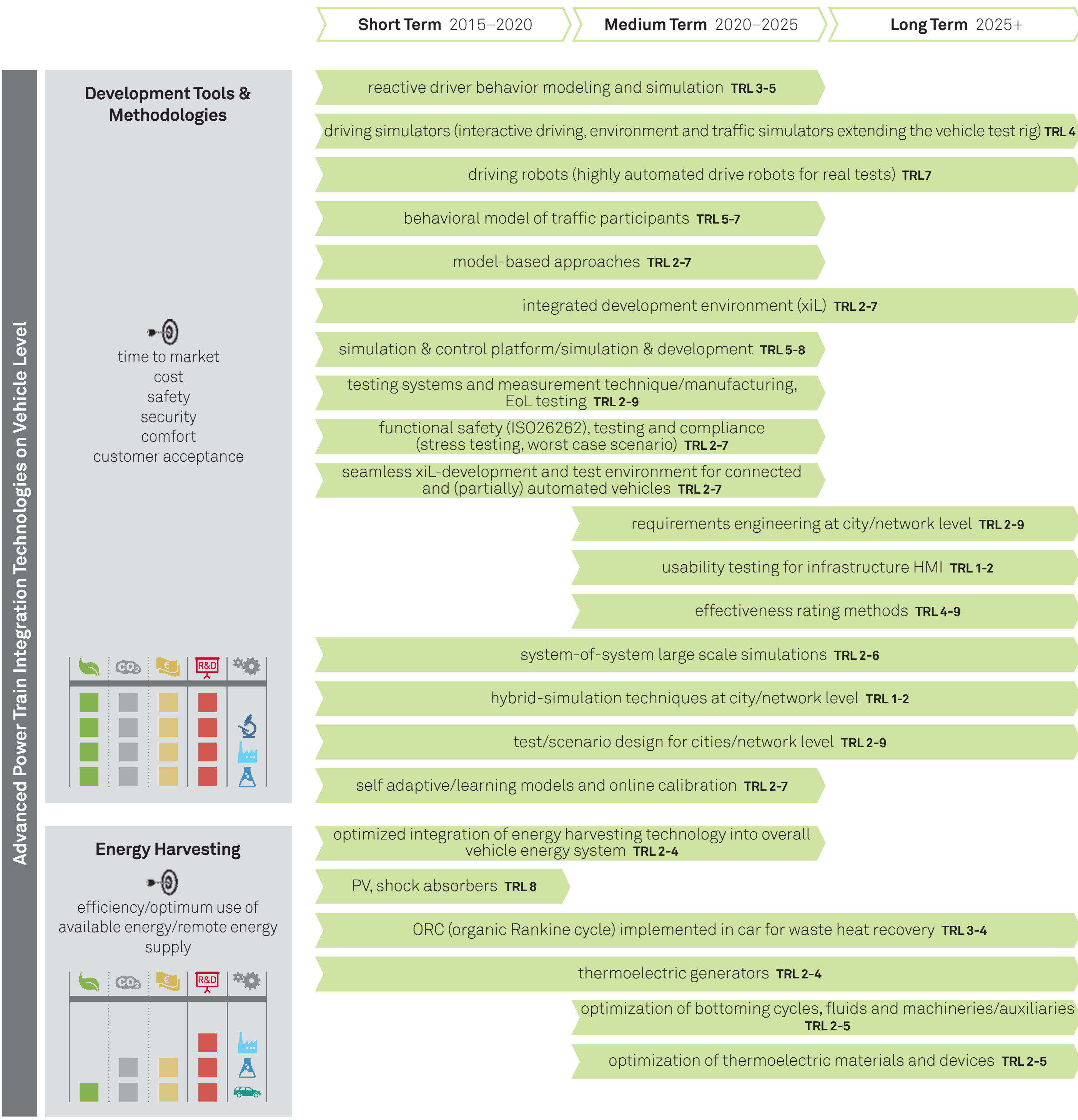
Conventional cabin heating and air conditioning systems use the waste heat from the combustion engine for heating and belt-driven air conditioning compressors for cooling. Since highly efficient power trains (whether advanced thermodynamic or pure electric) produce less waste heat, heating the cabin requires new innovative and efficient solutions. Therefore, heating and cooling must be treated in an overall context, including infrastructure. Pre-heating and pre-cooling of the cabin at the charging station without affecting the range or use of adiabatic cooling systems and navigation-aided early shutdowns must be considered. Additionally, hybrid or pure electric power trains require demand-driven air conditioning compressors as the combustion engine is not operated permanently. Furthermore, due to the relatively low capacity of the present battery technologies, heating, ventilation and air conditioning (HVAC) reduces the total range of the vehicle tremendously. New technologies for efficient HVAC are latent heat storages, new materials such as zeolite, active thermal materials and heat pump systems.

Innovative "Regenerative Braking Systems" help to enhance efficiency and braking comfort whilst reducing particles if compared with conventional disk braking systems. R&D effort is required in the field of high performance 4-wheel regenerative braking systems for optimal energy recuperation as well as in the field of mechanical energy storage devices.

Significant efforts will be necessary to ensure "Vehicle Safety", which increases with the complexity of the power train. The "Synergies and Parallel Production" of thermodynamic, hybrid and FC power trains are promising options to lower production costs.

Huge R&D efforts have to be put into vehicle integration. For new power train technologies, experts estimate that the function on the component level is only responsible for about 10% of the overall effort whilst vehicle integration causes about 90%. Further development in geometrical and functional "Vehicle Integration" as well as in new modular vehicle concepts (e.g. simulation) is required.

Great R&D efforts are being made in the field of control units (xCU). The term "xCU" encompasses all control units that are relevant for advanced power trains, including the operating strategy. Optimized operation strategies can increase efficiency and reduce pollutant emissions. Predictive operating strategies play an important role, as well as the consideration of a combined controller, for both passenger cars and commercial vehicles.



Short Term 2015–2020 | **Medium Term** 2020–2025 | **Long Term** 2025+

Advanced Power Train Integration Technologies on Vehicle Level

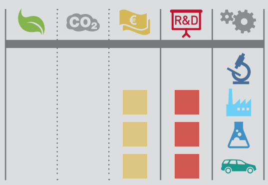
Heating, Ventilation and Air-Conditioning (HVAC)

efficiency (range) vs. comfort integration

- latent heat storage **TRL 5**
- new materials (zeolite) **TRL 4**
- active thermal materials **TRL 2**
- heat pump system for HVAC **TRL 5-6**
- HVAC acoustics **TRL 3-4**

Vehicle Safety

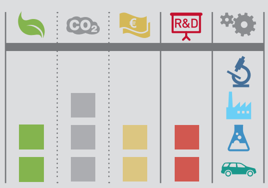
increased safety for all traffic participants



- vulnerable road users (pedestrians, cyclists, ...) **TRL 3-8**
- crash safety (battery, flywheel, hydrogen storage), occupant safety **TRL 7-9**
- functional safety ISO 26262 **TRL 3-8**
- vehicle qualification, road safety **TRL 4-7**
- new test procedures **TRL 2-4**
- effectiveness rating instead of fixed test ratings **TRL 4**

Regenerative Braking Systems

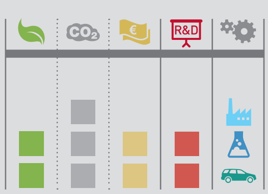
efficiency/reducing particles/ braking comfort



- high performance 4-wheel regenerative braking system for optimal energy recuperation **TRL 5**
- reducing particles/braking comfort **TRL 4-5**
- energy recuperation/actuators **TRL 5-6**
- mechanical energy storage devices **TRL 5-6**

Lightweight Vehicle Structures incl. Alternative Materials

efficiency
mass reduction
manufacturing costs
recycling



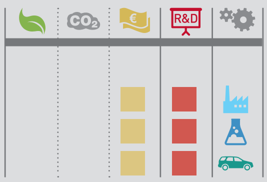
- lightweight acoustics **TRL 4-7**
- materials mix **TRL 6-8**
- wheel hub motors **TRL 7-8**
- red. number of components/ new materials **TRL 6-7**
- highly integrated battery **TRL 6-7**
- electric motor & components **TRL 7-9**
- new simulation methods for failure prediction **TRL 2-7**
- new joining techniques **TRL 2-7**
- crash simulation **TRL 4-7**
- multimaterial chassis design **TRL 3-8**
- non destructive testing methods **TRL 3-8**
- new lightweight alloy develop-ment (Al-, Mg-based) **TRL 4-7**

Short Term 2015–2020 | **Medium Term** 2020–2025 | **Long Term** 2025+

Advanced Power Train Integration Technologies on Vehicle Level

Synergies and Parallel Production

cost reduction/high volume production technologies/industry 4.0



- "re-use of IT technologies" for automotive **TRL 3-8**

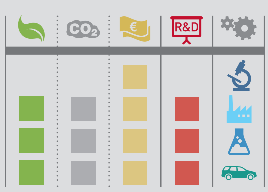
Vehicle Integration

cost/packaging/ reducing number of parts/ safety/modularization

- objective assessment of automated vehicle functions **TRL 3-8**
- functional hardware integration **TRL 4-7**
- standardized interfaces **TRL 5-7**
- assembly/service concepts **TRL 1-4**
- vehicle integration of drivetrain technologies **TRL 8**

xCU incl. Software

efficiency
emissions
security
safety



- virtual xCU: virtual validation (incl. model validation), enhancement of FMI/FMU **TRL 3**
- V2X ready **TRL 4-5**
- energy management functions **TRL 5-7**
- modular software function **TRL 4-6**
- functional safety and testing **TRL 5**
- optimizing operation strategy depending on drive train concept **TRL 6-7**
- predictive operating strategies **TRL 3-5**
- combined control units **TRL 4-6**
- model based control **TRL 3-6**
- multi core controller **TRL 3-6**
- transmission CU and actuator **TRL 5-7**
- energy management **TRL 5-7**

Legend

Benefit

- emission reduction (incl. noise)
- CO_2 & resources*
- added value

R&D demand

Type of project required

- (material) fundamental research
- industrial research
- experimental development
- demonstration

Technology readiness levels (TRL)

TRL 1: basic principles observed
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TRL 9: actual system proven in operational environment

* potential to reduce CO_2 and to raise independency from fossil resources

Advanced Vehicle Control Systems

In line with the general trend in the automotive industry and the high level of activities of A3PS members, aspects in the field of advanced vehicle control systems must be taken into account in this roadmap. The technology path for those systems leads from Advanced Driver Assistant Systems (ADAS) via Connected Vehicle Technologies to fully automated driving. On a higher level, those technologies together with lightweight vehicle structures and materials are interlinked through the topic of vehicle safety. All of those technologies affect the vehicle safety and have impact on vehicle concepts and the power train.

The A3PS members keep track by monitoring the development in the field of advanced vehicle control systems. This is in order to justify innovation in overall vehicle technologies and to increase the chances for the Austrian industry. This also applies to many companies and institutions in the area of vehicle electronics and software.

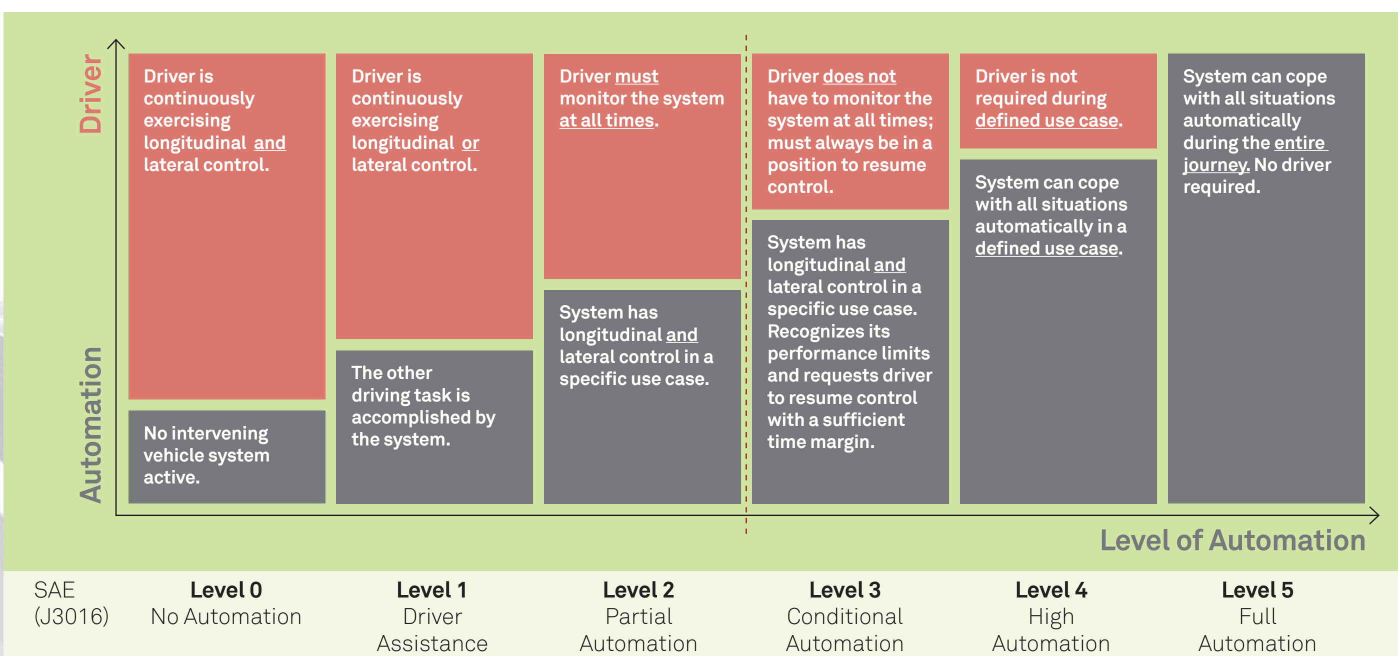
The technology progress for all kinds of road vehicles in the past decades has significantly improved safety, energy efficiency and emissions as well as the comfort of today's vehicles. But still, the number of fatalities and injured persons in road traffic is much too high and therefore extended effort is needed to bring these figures down.

R&D effort in the last 20 years around the globe results in advanced vehicle control technologies becoming mature for implementation in the traffic environment and can be seen as breakthrough for a future traffic with 'zero' fatalities whilst maximally utilizing the available infrastructure capacity. Once "zero" fatalities, injuries and accidents in the road transport system have been achieved, an era of totally new vehicle concepts will be possible with radical weight reduction, thus reducing energy consumption as well as significantly reducing road space requirements by those vehicles.

Still, the demand for road vehicles is growing on a global scale, whereas road infrastructure capacity can neither balance this demand today nor will it be extended in line with the number of vehicles. Therefore, automated vehicles are a key element for an efficient future road transport system.

This chapter drafts the path for the radical change from conventional vehicle concepts (SAE level 0) to fully automated driving vehicles (SAE level 5) in the long term. Actually, the huge effort being expended by academic and industrial R&D on numerous research projects, prototype development and systems reliability will lead to an "electronic revolution" inside the vehicle. The stepwise implementation of advanced vehicle control systems on the path to automated driving enabled by sophisticated electronic systems is drafted by SAE, as shown in the following figure.

Automation levels, oriented closely to the definition of BASt project group "Legal consequences of an increase in vehicle automation"

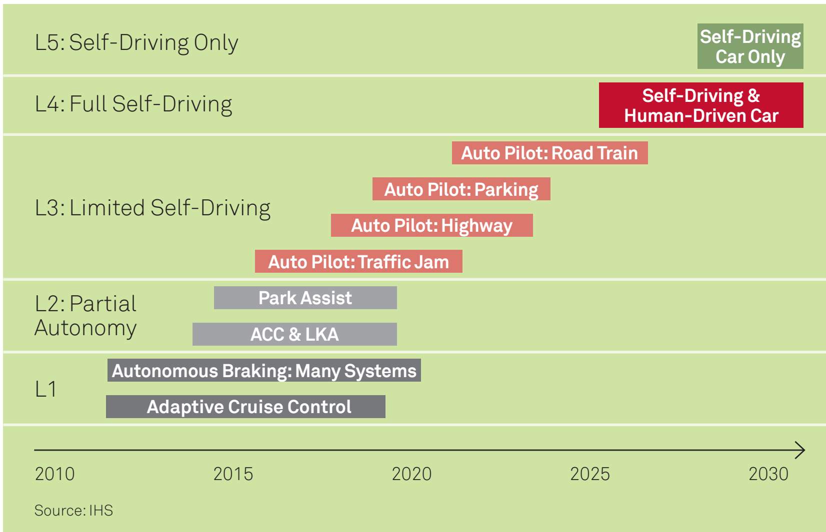


Source: VDA Position "Automated Driving"; 21.01.2014

The number of electronic components and sensors in road vehicles has increased tremendously within the last 10 years and will grow furthermore to thousands of components in the future. Thus, systems starting with ABS, electronic stability program (ESP), advanced driver assistance systems (ADAS), drive by wire components and software for highly automated driving and finally will result in vehicles which can be fully automatically operated in all conditions.

By taking over the driver's tasks gradually, fully automated vehicles will be the logical extension of advanced vehicle control systems in the long term. Therefore, the functionality, including all the safety aspects, still needs significant R&D effort to enable fully automated vehicles to be viable in the real transport environment.

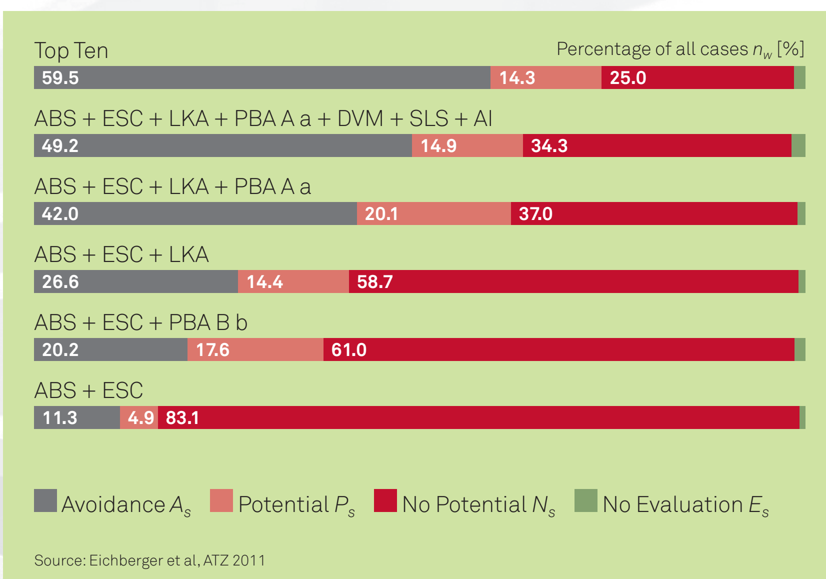
Self-driving car evolution



The expected impact of these applications is to achieve zero fatalities globally and utilize available infrastructure capacity to a maximum, as it is expected that the number of vehicles will continue to increase in the next 20 years.

Advanced vehicle control systems mainly aim to increase energy efficiency and safety as well as to improve comfort and enable the communication between vehicle and infrastructure. Since the majority of all accidents is caused by the human element factor, advanced vehicle control systems have the potential to avoid those accidents and therefore, save human life. The chart below shows that an accident avoidance of over 50% is possible for a combination of ABS, ESC, lane keeping assist (LKA), predictive brake assist (PBA), automated emergency braking (AEB), driver vigilance monitoring (DVM), speed limiting systems (SLS) and alcohol interlock (AI).

Potential effectiveness of combined systems



Experts in automated driving around the globe expect a dramatic reduction of vehicle collisions, accidents and fatalities in the range of minus 90% once these functionalities are deployed into e.g. 90% of the vehicles on the road. Assuming that a worst case crash happens at a max. speed of 10 km/h (around 3 m/sec) compared to today's regulation of Euro NCAP5 [equal to 50 km/h (15 m/sec)] the safety concept of all vehicles will have to be redrafted, enabling the application of lightweight structures, reducing the crash buffer, and finally resulting in less energy consumption and better propulsion performance. On the other hand, the classical testing with fixed test cases like Euro NCAP does not cover all the complexities of the systems for automated driving and may induce biases in the wrong direction.

Organizational and legal challenges will play a major role in the successful implementation of automated driving vehicles. In order to clarify the delineation of responsibilities between the driver, the vehicle and the infrastructure, a bundle of scenarios needs to be examined. One important issue is a missing legal framework that allows the testing of advanced driver assistance/vehicle control systems on existing road infrastructures in particular for higher SAE automation levels (3–5). Once the legal framework is set up, testing in dedicated public road sections will be possible.

Particular testing areas will be needed, where especially bad road and weather conditions in a complicated mixed traffic environment can be tested in detail. Such testing areas shall include rural roads, city areas, high-speed areas as well as multilane roads where both vehicle and infrastructure technologies can be tested in a mixed vehicle environment. These traffic environments also include automated vehicles, non-automated vehicles, trucks, bicycles, dummy pedestrians, dummy animals, construction and artificial obstacles.

Demonstration of dependability, i.e. safety, security, integrity, availability, reliability and maintainability of automated driving vehicles will be of great importance.

In addition, standardization will be essential to provide clarity on the one hand (e.g. communication protocol and frequency) but on the other hand will offer a free scope for creativity (e.g. open standards).

Partial Automated Vehicles (up to SAE Level 2)

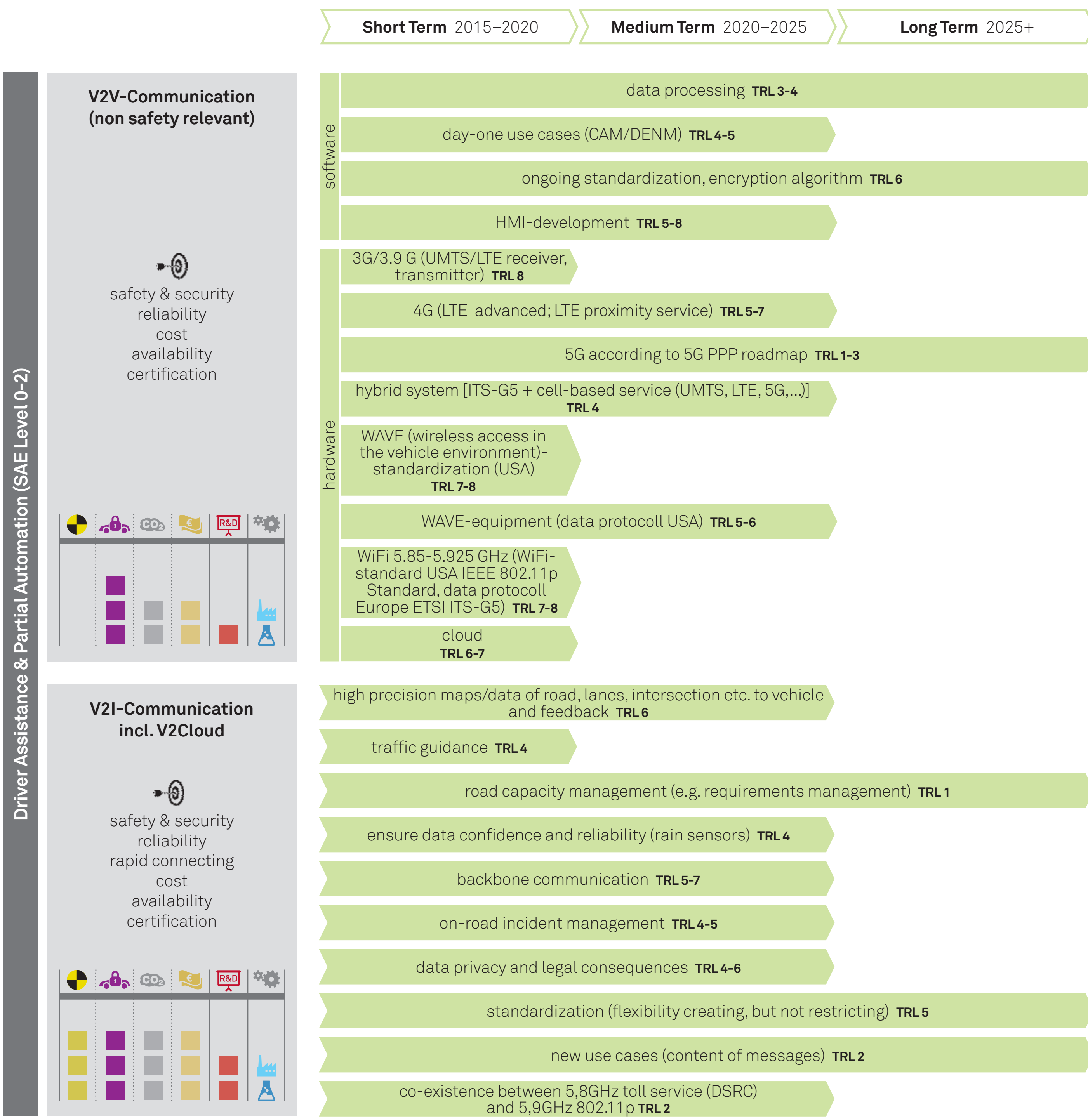
Technologies necessary to implement **vehicles up to SAE level 2** are summarized in the table below. Moreover, these technologies provide an important basis to enable technologies for vehicles of the higher SAE levels 3 to 5. Both the complex area of automated driving and the unclear legal situation require components that consider new use cases already in the design of components.

Market Readiness of Technologies for SAE Level 0-2

The key areas for the successful implementation of vehicles with partial automation (SAE level 2) are:

- Communication between vehicles and between vehicles and infrastructure (V2V, V2I)
- Electrically actuated and electronically (or optically) controlled components (x by wire)
- Positioning and mapping (high resolution maps, real time updating, indoor positioning)
- Predictive operation and control strategies (eco routing, reliable routing information)
- Testing infrastructure (for power train, connectivity, vehicle and infrastructure)

In addition, the priorities listed above result in increased demands on complex control architectures and data information management.

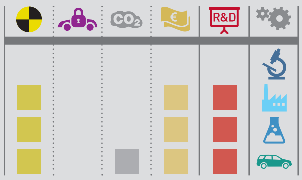


Short Term 2015–2020 | **Medium Term** 2020–2025 | **Long Term** 2025+

Driver Assistance & Partial Automation (SAE Level 0-2)

X by Wire Components

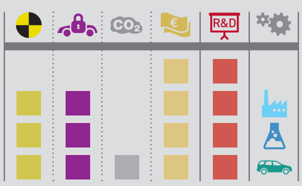
cost/efficiency/reliability/precision/certification



- functional safety ISO 26262 **TRL 8**
- steering **TRL 6**
- braking **TRL 8**
- power train control (engine, transmission, auxiliaries) **TRL 8**

Sensor Technologies

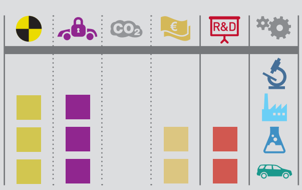
safety
reliability
precision
cost
reduction of amount of sensors



- virtual sensors/model-based measurement **TRL 3-5**
- structural health monitoring **TRL 5-7**
- sensor models and modeling techniques **TRL 4-8**
- test environment for sensors and actuators **TRL 2-4**
- stereo video camera (daylight and night vision) **TRL 8**
- 1-dimension LIDAR **TRL 7**
- intelligent RADAR sensor technology **TRL 8**
- ultrasonic sensors **TRL 8**
- laser scanner **TRL 8**
- Time Of Flight (TOF)-cameras (PMD) **TRL 4**
- intelligent sensor fusion to create sufficient model of surrounding environment **TRL 8**
- the vehicle as precise traffic sensor **TRL 2-5**

Localization/Positioning (relative and absolute) & Mapping

safety/increase precision/reliability/cost reduction



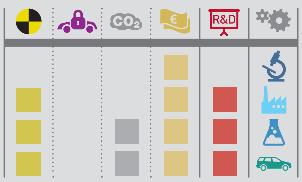
- cost-efficient competitive positioning solutions **TRL 4-7**
- completeness of external sources (e.g. high resolution maps, real time updating of additional contents) **TRL 6-7**
- high precision GPS position of ego vehicle and other traffic (vehicles, bicycles, pedestrians, …) **TRL 6**
- indoor positioning **TRL 6-7**
- GPS, GALILEO, GLONASS **TRL 8-9**
- precise positioning by fusion/combination of satellite navigation and vehicle sensors **TRL 6-7**
- Beidou (China) – currently local, but planned to become global **TRL 8**

Short Term 2015–2020 | **Medium Term** 2020–2025 | **Long Term** 2025+

Driver Assistance & Partial Automation (SAE Level 0–2)

Predictive Operation & Control

right-sizing components
vehicle efficiency
vehicle safety
reduce emissions
extended lifetime



- reliable mandatory routing information **TRL 4-5** (short to long term)
- maneuver based/scenario simulation **TRL 6** (short to medium term)
- predictive transmission control **TRL 8** (short term)
- eco routing **TRL 8** (short term)
- hybrid predictive energy management **TRL 7-8** (short to medium term)
- coasting assistant **TRL 6** (short to medium term)
- e-horizon **TRL 7** (short to medium term)
- HMI (e.g. gesture control) **TRL 6-8** (short to medium term)
- predictive regenerative 4-wheel braking **TRL 5-7** (short to long term)
- predictive traffic control **TRL 2-4**: node/intersection/line control **TRL 4**, net control **TRL 2-3** (medium term)
- traffic performance quantification under various regimes incl. safety and robustness metrics (beyond level of service, etc.) **TRL 2-4** (short to long term)
- cooperative traffic control strategies (e.g. platooning, etc.) **TRL 4-7** (short to medium term)
- behavioral models for drivers and all kind of traffic participants (in particular VRU) **TRL2-4** (short to medium term)

Advanced Test Benches, Environments & Methodologies (Powertrain, Vehicle, Sensors & Actuators) incl. Connectivity

reduction of real-world field testing
manage increased complexity
secure communication between vehicles
short time to market
secure and energy efficient development

- methodologies for distributed virtual and physical powertrain test rigs **TRL 5-7** (short to medium term)
- GPS stimulation **TRL 5-6** (short to medium term)
- torque stimuli: Dyno **TRL 9** (short term)
- video stimuli & simulation & testing **TRL 6** (short to medium term)
- RADAR, LIDAR, ultrasonic stimuli & simulation & testing **TRL 2-4** (medium to long term)
- C2C & C2I simulation **TRL 2-4** (medium to long term)
- test environment for sensors and actuators **TRL 2-8** (short to long term)
- safety and security in one and the same system - related test modes, methods & equipment **TRL 2-4** (short to long term)

Legend

Benefit
- safety
- security
- CO_2 & resources*
- added value

R&D demand

Type of project required
- (material) fundamental research
- industrial research
- experimental development
- demonstration

Technology readiness levels (TRL)
- TRL 1: basic principles observed
- TRL 2: technology concept formulated
- TRL 3: experimental proof of concept
- TRL 4: technology validated in lab
- TRL 5: technology validated in relevant environment
- TRL 6: technology demonstrated in relevant environment
- TRL 7: system prototype demonstration in operational environment
- TRL 8: system complete and qualified
- TRL 9: actual system proven in operational environment

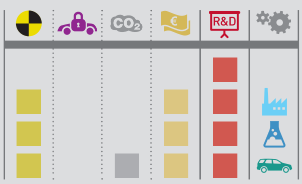
* potential to reduce CO_2 and to raise independency from fossil resources

Short Term 2015–2020 | **Medium Term** 2020–2025 | **Long Term** 2025+

Driver Assistance & Partial Automation (SAE Level 0-2)

Complex Control Architectures

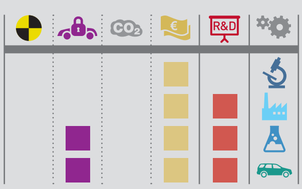
reducing number of components
increase efficiency
flexibility in function development



- reconfigurable systems for fail-operational applications (synergies with air and rail control) **TRL 5-6**
- functional safety (ISO26262) **TRL 7-8**
- reliable processing of cognitive data **TRL 7-8**
- dependable power computing **TRL 5-6**
- extended processor performance **TRL 3**
- sensor platforms **TRL 2-5**
- sensor fusion (camera & LIDAR; camera & RADAR; stereo camera, XFCD & stationary traffic sensors) **TRL 2-9**
- open-source software platform for automated driving **TRL 4-5**
- interfaces and message content (standardized message content) **TRL 5-6**
- hierarchy of controls and software modules (master/slave) **TRL 4-5**
- objective assessment of automated vehicle functions **TRL 6-7**
- overall, common control architecture for cooperative driving/ smart city **TRL 2-4**

Data & Information Management (non safety relevant)

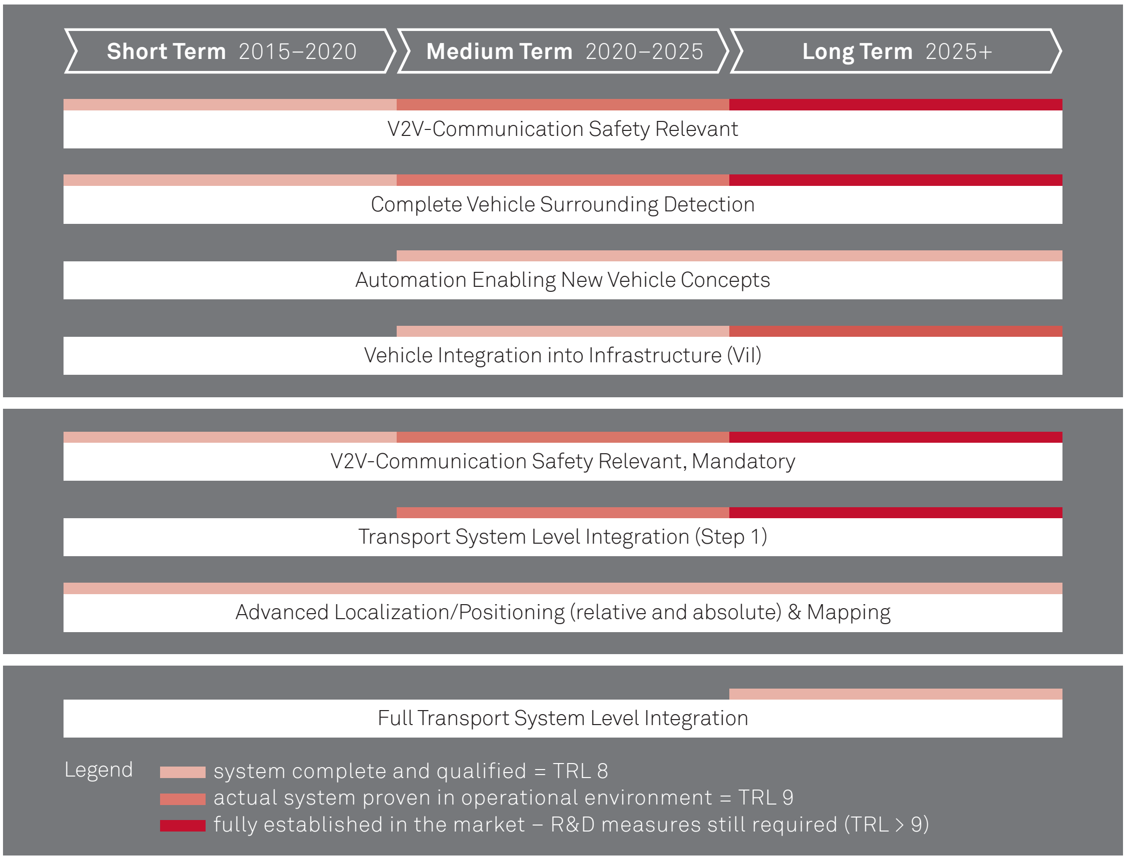
data from three sources
(vehicle sensors, I2V, cloud2V)
and processing



- receive & feedback data algorithms (I2C,C2I, C2C) **TRL 4-8**
- algorithm design **TRL 3-8**
- information presentation (HMI) **TRL 1-6**
- sensor fusion data management **TRL 7-9**
- architecture logical/functional (incl. redundant algorithm) **TRL 2-8**
- on-board information model for vehicle and infrastructure **TRL 7**
- on-board information aggregation **TRL 7**
- after sales operational data optimization (e.g. software updates) **TRL 7**
- data synchronization between car and infrastructure **TRL 3**
- paying functions (“car as driving credit card”) **TRL 6-9**

Conditional, High and Full Automation Vehicles (SAE Levels 3-5)

SAE levels 3-5 vehicles require increasing activities in the field of sensors and actuators, integration (components into vehicle as well as vehicle into infrastructure), safety-relevant communication as well as advanced technologies for positioning and vehicle surrounding detection. If they should cooperate, all traffic participants will need to be integrated into a common control concept in the long term.



Market Readiness of Technologies for SAE Level 3

Market Readiness of Technologies for SAE Level 4

Market Readiness of Technologies for SAE Level 5

Conditional Automation Vehicles (SAE Level 3)

SAE level 3 vehicles are able to drive automatically in specific use cases without manual intervention by the driver (e.g. driving on highways, lane keeping, passing roundabouts, etc.). Still there are many traffic situations where the driver has to take over full control of the vehicle. Therefore, strong R&D efforts are necessary in the field of "Complete Vehicle Surrounding Detection" and the integration of the vehicle into infrastructure. Additionally "Automation Enabling New Vehicle Concepts" can be initiated by measures such as novel safety and extreme lightweight concepts as well as demand-oriented vehicles. Radical new vehicle concepts will also have a lasting impact on the business models of car manufacturers. Due to the fact that the system is not able to drive automatically under all circumstances, the driver must stay in a position to resume control as requested in the Convention on Road Traffic of 1968 by UNECE ("Vienna Convention").

High Automation Vehicles (SAE Level 4)

Vehicles equipped with level 4 functionality cope with all traffic situations on public roads without manual intervention. As it is expected that international legal regulation defined by UN-ECE (so-called "Vienna Convention") will not be redrawn by the respective administrative nation bodies soon, it is still mandatory for a driver to sit behind the steering wheel. Safety-relevant V2V-communication and even more accurate positioning and mapping are mandatory.

Full Automation Vehicles (SAE Level 5)

As soon as the aforementioned "Vienna Agreement" has been suspended by national regulatory bodies, vehicles equipped with the complete set of automated functions will not need a driver behind the steering wheel. There won't even be a steering wheel in those vehicles at all.
Additionally, automated vehicles will support policy to comply with targets regarding energy efficiency, emissions, access to individual mobility and equality.

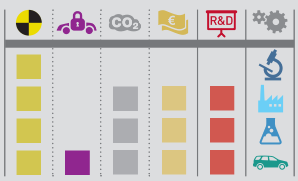
Note: For a long time, there will be a 'mixed environment' in road traffic, where unequipped vehicles, partly equipped vehicles and fully automated vehicles will operate or be operated on roads at the same time. This may cause a great deal of dangerous situations and place a heavy burden on system developers and vehicle manufacturers to cope with even more complex situations in the real, on-road traffic environment.

Short Term 2015–2020 | **Medium Term** 2020–2025 | **Long Term** 2025+

Conditional Automation (SAE Level 3)

V2V-Communication Safety Relevant

safety & security/reliability/ rapid connecting/cost/ availability/certification/ new use cases/ policy: reserve 5,9 GHz band only for automotive applications



- channel congestion control/ mitigation algorithms **TRL 7**
- extended safety message types (e.g. extended CAM) **TRL 3-5**
- self organizing "swarm intelligence" **TRL 2-4**
- standardization **TRL 6**
- adaptive function design (e.g. for new use cases) **TRL 3-5**
- security measures integrated in design **TRL2-4**

Complete Vehicle Surrounding Detection

safety & security
level of integration
improving precision
improving reliability
reducing cost

- 3-dimensional LIDAR (improving precision and reliability) **TRL 6**
- improved ultrasonic sensors **TRL 6-7**
- integrated radar sensors **TRL 6-7**
- integrated video sensors **TRL 6-7**
- data harvesting and interpretation (application in worst case conditions, traffic signs, obstacles, humans/animals, ...) **TRL 5**
- C2X-based surrounding detection **TRL 4-6**
- advanced selective driver warnings/support systems (advanced HMI) **TRL 5-6**
- properties of objects beyond geometrically sensed (e.g. mass, stiffness, age/type of person, situation context, intended behavior...) **TRL 3-5**
- friction coefficient of the road **TRL 6-8**
- intelligent sensor data fusion to create sufficient model of surrounding environment **TRL 5**
- comparison of surrounding environment to maps (incl. correction feedback to keep maps up to date) **TRL 5**
- advanced data processing methodologies **TRL 2-4**
- advanced overall vehicle status model (MBSE) **TRL 8**
- new sensor technologies **TRL 1-3**

Automation Enabling New Vehicle Concepts

safety/comfort/energy efficiency /reducing space requirements

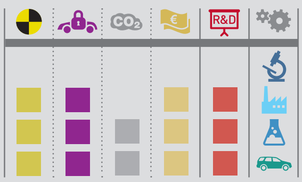
- novel safety concepts **TRL 1-8**
- extreme lightweight concepts (innovative materials, construction) **TRL 3-4**
- new NCAP definitions **TRL 6**
- demand oriented/customized vehicle concepts for different user groups (incl. handicapped/ blind people) **TRL 2**

	Short Term 2015–2020	Medium Term 2020–2025	Long Term 2025+

Conditional Automation (SAE Level 3)

Vehicle Integration into Infrastructure (VII)

transition from reactive to predictive and interactive traffic management (safety/traffic flow/energy efficiency/capacity utilization)/regulative measures for mandatory data delivered by car

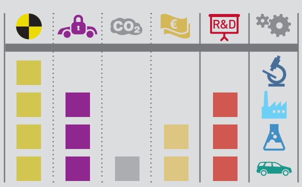


- individualized predictive traveler services **TRL 1-3** (short to long term)
- real time and predictive map information **TRL 5** (short term)
- predictive, automated and capacity oriented routing (infrastructure capacity management) **TRL 5** (short to long term)
- co-operative traffic management (e.g. traffic measures for major incidents) **TRL 1** (short to long term)

High Automation (SAE Level 4)

V2V-Communication Safety Relevant, Mandatory

safety & security/reliability/rapid connecting/cost/availability/certification



- redundant systems for safety reasons **TRL 2-4** (short to long term)

Transport System Level Integration (Step 1)

increased level of interaction between vehicle and infrastructure/optimized utilization of infrastructure capacity

- interfaces to other transport modes **TRL 4** (short to long term)
- improve level of prediction in all respects of route transport **TRL 2-3** (short to long term)
- platooning **TRL 4-6** (short to medium term)
- cooperative ACC **TRL 3-4** (short to medium term)
- fleet management **TRL 5-6** (short to medium term)
- overall control architecture **TRL 2-4** (short to medium term)
- necessary content of information exchange **TRL 2-4** (medium term)

Advanced Localization/Positioning (relative and absolute) & Mapping

safety & security/increase precision/reliability

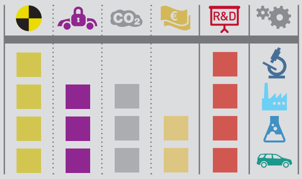
- indoor positioning for parking systems **TRL 6-7** (short to medium term)
- increasing the position accuracy to approximately +/– 3 cm **TRL 5-6** (short to medium term)
- data fusion for high precise positioning (dead reckoning & GNSS) **TRL 5-7** (short to medium term)
- high precision GPS position of ego vehicle and other vehicles **TRL 6** (short to medium term)
- fine localization under various conditions with/without/malfunction satellite navigation **TRL 3-4** (medium term)

Short Term 2015–2020	**Medium Term** 2020–2025	**Long Term** 2025+

Full Automation (SAE Level 5)

Full Transport System Level Integration

safety & security/full level of interaction between vehicle and infrastructure/upmost utilization of infrastructure capacity



- interfaces to other transport modes **TRL 4**
- improve level of prediction in all respects of route transport **TRL 2**
- enable better efficiency in road traffic e.g. automatic platooning, automatic usage of full road width, etc. **TRL 5-6**
- overall control architecture **TRL 2-4**

Legend

Benefit
- safety
- security
- CO_2 & resources*
- added value

R&D demand

Type of project required
- (material) fundamental research
- industrial research
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Technology readiness levels (TRL)
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* potential to reduce CO_2 and to raise independency from fossil resources

Renewable Fuels

In addition to the optimization of the respective power train technology in terms of efficiency, the use of renewable energy has the largest potential to reduce CO_2 emissions. There is a range of low-carbon technologies that could play a large role in decarbonizing transport. In a first step, renewable fuels mentioned within this roadmap have been divided into liquid fuels and gaseous fuels. The considered liquid fuels, based on their conversion options, are bio ethanol as Otto fuel and FAME (Fatty Acid Methyl Esters), HVO (Hydrotreated Vegetable Oils), Fischer-Tropsch bio diesel and OME (Oxymethylenether) as diesel fuels. Gaseous fuels are methane and hydrogen.

In a second classification, three main production categories with clearly defined fuel characteristics that comply with the regulated fuel quality standards have been considered: chemical, biochemical and thermal. The raw materials associated with the fuels considered in the following include oleaginous plants or animal fats, starch or sugar crops, lignocellulose raw materials and organic waste, respectively. If not mentioned separately, the listed production processes are understood without pre or post processes. In general, it can be said that a huge challenge in the field of renewable fuels made from crop plants is the contamination of the raw material (e.g. sand). Pre processes such as wet scrubbing need further optimization.

Furthermore, alternative fuels can be divided in those that can directly replace fossil fuels (and thus can be used by common internal combustion engines and existing infrastructure with little to no adjustments) and those which require entirely new technologies for energy conversion and infrastructure – such as hydrogen used in fuel cells.

Fuel Categories

Liquid Fuels		Gaseous Fuels
For Gasoline Engines	**For Compression Ignition Engines**	**For ICEs and Fuel Cells**
■ Ethanol ■ Synth. Otto Fuel	■ FAME ■ HVO ■ OME ■ Synth. Diesel Fuel	■ Methane (CNG, LNG) ■ Hydrogen

The main driver for the implementation of renewable fuels is the European Renewable Energy Directive 2009/28/EC which prescribes 10% renewable energy sources in transport for each member state in 2020.

As mentioned in the chapters above, the internal combustion engine will remain the dominant power unit in the period covered by the roadmap. It will be increasingly faced with stringent requirements in terms of CO_2 and pollutant emissions. Furthermore, the requirements on fuels are changing due to the consequent and continually ongoing optimization of the ICE (in particular the optimization of the combustion process).

The following table shows all liquid renewable fuels and their market maturity according to their production process.

Market Readiness of Renewable Liquid Fuels

FAME, a renewable diesel fuel belonging to the group of BtL (Biomass-to-Liquid), is currently mixed with fossil fuel to around 5% volume with the target of 10% – limited by the "European Fuel Quality Directive". FAME can be produced via chemical conversion routes from vegetables or used cooking oil and animal fats as raw materials. The use of used cooking oil and animal fats is particularly ecological because already incurred residues are used. However, depending on the cultivation area, the production of FAME from oleaginous plants can be in direct conflict with food production.

HVO, also known as NExBTL (declared by NESTE OIL), is a renewable diesel fuel from hydrogenated vegetable oil. HVO can be produced via chemical conversion routes and can be mixed with fossil fuel to any extent and is free of sulfur and aromatics. Furthermore, it significantly reduces PM, CO and HC emissions compared to fossil fuel. HVO will become increasingly important, as long as the proportion of vegetable oil as a raw material for the production of fuel continues to rise. Since fossil fuels have to be hydrogenated within the production process, the possibility of co-processing also exists.

The so-called Fischer-Tropsch-process enables the chemical production of bio diesel and is characterized by three main steps after appropriate biomass pretreatment: gasification of biomass in order to produce a raw gas, gas treatment to produce synthesis gas and catalytic synthesis to produce synthetic biofuels. Currently the process is mainly designed to obtain diesel fuel as a product, although naphtha (petroleum) makes up 30% of the product. Besides the Fischer-Tropsch-process, the liquid phase pyrolysis of biomass and the subsequent hydrogenation of the pyrolysis oil enable a further thermal means of producing BtL fuel. In the future, these thermal processes might be replaced by biochemical processes, but this is still a vision for future production. HVO as well as BtL fuels are also free of sulfur and aromatics and significantly reduce PM, CO and HC emissions in the exhaust compared to fossil fuel. Compared to HVO, Fischer-Tropsch fuels are of similar quality and can be applied as a premium fuel or mixed with any fossil diesel fuel.

Defined as Otto fuel, bio ethanol is mainly biochemically produced from sugar (e.g. beets and cane) or starch crops (e.g. corn, wheat, rye) and mixed with fossil fuel currently at 5% volume. Due to regulatory measures, this proportion is about to increase, which makes adaptations to vehicles and infrastructure necessary. Depending on the cultivation area, the resulting need for sugar and starch crops can lead to a direct conflict with food production. Residues from the production of these crops are used within agricultural cycles (e.g. as fertilizer of livestock bedding). Additionally, major advances have been made with biochemical processes, which enable the production of bio ethanol from lignocellulose and avoid the problem of a conflict with food production. A great challenge is that the membranes of the filter presses for the post processing must be regularly cleaned.

For completeness, the table includes Fluid Catalytic Cracking (FCC). FCC is a way to produce renewable Otto and diesel fuel from vegetable oil and solid biomass (e.g. lignocellulose) via thermal conversion. As mentioned above, vegetable oil will be used for the production of HVO, if at all. Therefore, this roadmap considers only the production of bio ethanol from lignocellulose.

Due to the current situation on the world market (oil prices, shale gas exploration, regulations…) the estimation of the future development of these fuels is very difficult. It is assumed that vegetable oils will be preferentially used for the production of FAME or HVO (diesel fuel) up to a maximum of 7% of the specific needs of the respective country.

Bio ethanol can also be produced from gasification of lignocellulose – a thermal process.

The further increase of the amount of bio ethanol in fossil fuels is limited through the revised "Renewable Energy Directive" (RED) and requires a change in terms of feedstock – from sugary or starchy feedstock to lignocellulosic crops (e.g. straw, bagasse, wood, switch grass). Therefore the necessary technology is currently being intensively researched worldwide. Expertise in pretreatment and distillation facilities for such biofuel production plants exists in Austria but still needs development. It is expected that low-cost residues and waste sources will be the preferred raw-materials in the coming years, followed by cellulosic perennial energy crops.

Additionally, bio Otto fuel can be produced by Hydrothermal Gasification, respectively diesel or gasoline can be produced by Liquid-Phase Pyrolysis (with/without HDO) as shown in the table.

Liquid biofuels such as bio methanol, bio DME (Dimethylether), butanol and fuels from direct liquefaction were neglected.

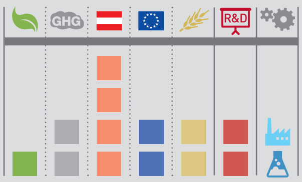
	Short Term 2015–2020	Medium Term 2020–2025	Long Term 2025+

Renewable Liquid Fuels

Bio Diesel Fuel by Chemical Process

FAME from Vegetable Oil

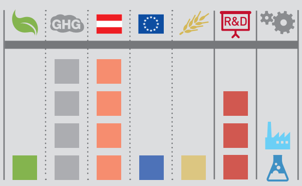
additive to diesel (FAME ~10%)



- aging research (polymerization,...) of the fuel > 7% **TRL 6-7** (short to medium term)
- exhaust after treatment at higher additive **TRL 4** (short to medium term)
- optimization of raw materials **TRL 3** (short to long term)

FAME from Animal Fats and Used Edible Oil

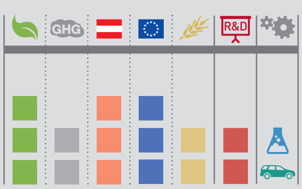
additive to diesel (FAME ~10%)



- increase of animal fat and used edible oil collection rate **TRL 7** (short term)
- optimization of the production process **TRL 8** (short term)
- optimization of raw materials **TRL 3** (short to long term)

Hydrogenated Vegetable Oil (HVO)

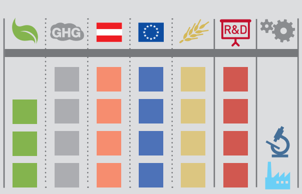
increase in the share of diesel ~30%/verification of reduction of CO_2 production of a premium fuel



- co-processing (common hydrogenation of vegetable oils and mineral oil) **TRL 4** (medium term)
- additional structures in refineries **TRL 5** (medium to long term)
- follow-up treatment of the raw materials with low quality **TRL 7** (short term)
- at higher additive, adjustment of engine parameters - higher cetane number, reduction of emissions **TRL 4** (medium term)
- optimization of raw materials **TRL 3** (short to long term)

Liquid Phase Pyrolysis with/without HDO

commercial facilities/addition to refinery (demo plant available)/biogenic content in fossil fuels



- technology development **TRL 6** (short to medium term)
- useful process of product streams **TRL 5** (short to medium term)
- increase efficiency **TRL 4** (short to medium term)

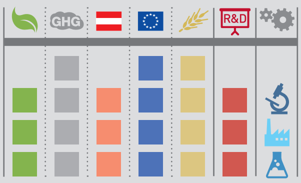
Short Term 2015–2020 | **Medium Term** 2020–2025 | **Long Term** 2025+

Renewable Liquid Fuels

Bio Diesel Fuel by Chemical Process

Bio Diesel by Fischer-Tropsch Process

commercial facilities (demo plant available)/replacement of diesel/premium fuel



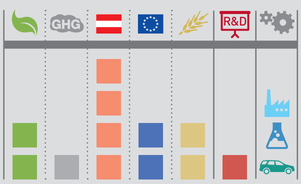
- improvement and scaling of gas processing **TRL 5**
- cost reduction **TRL 3**
- need for adaptation/potential of motor raising **TRL 2**
- simplification of the process **TRL 6**

Renewable Liquid Fuels

Bio Ethanol by Biochemical Process (Fermentation)

Bio Ethanol from Sugar and Starch

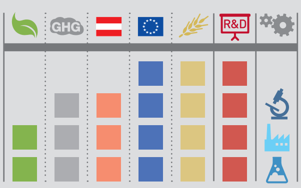
additive to gasoline (Bio Ethanol total ~10%)/ further increase in the share of petrol



- adapt engine technology at higher percentage **TRL 7**
- improvement of details of new combustion process **TRL 7**
- reduction of GHG emissions **TRL 4**
- optimization of raw materials **TRL 3**

Bio Ethanol from Lignocellulose

commercial facilities (pilot plant available)



- cost reduction **TRL 3**
- enzyme costs/efficiency and parameter adjustment **TRL 4**
- optimization of raw materials **TRL 3**
- simplification of the process **TRL 6**

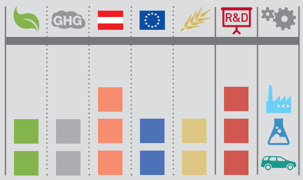
Renewable Liquid Fuels

Bio Otto Fuel by Thermal Process

Short Term 2015–2020 | **Medium Term** 2020–2025 | **Long Term** 2025+

Fluid-Catalytic-Cracking of Solid Biomass (Lignocellulose)

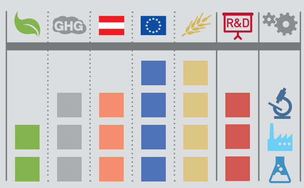
commercial facilities
(pilot plant available)



- refinery additions in order to reduce CO_2 **TRL 4**
- catalyst optimization **TRL 2**
- optimization of raw materials **TRL 3**
- simplification of the process **TRL 5**

Gasification of Lignocellulose

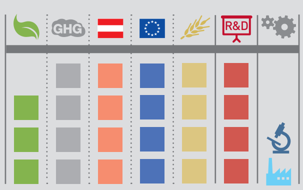
commercial facilities
(demo plant available)



- catalyst optimization **TRL 4**
- cost reduction **TRL 2**
- parameter adjustment **TRL 6**
- simplification of the process **TRL 6**
- optimization of reaction **TRL 4**

Liquid Phase Pyrolysis with/without HDO

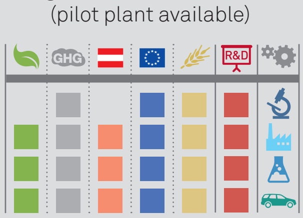
commercial facilities/addition to refinery (demo plant available) /biogenic content in fossil fuels



- technology development **TRL 6**
- useful process of product streams **TRL 5**
- increase efficiency **TRL 4**

Hydrothermal Gasification (in Liquid Phase)

commercial facilities
integration in refinery process
(pilot plant available)



- cost-efficient synthesis gas production **TRL 5**
- addition to refinery **TRL 2**
- suitable for raw materials with high water content (algae) **TRL 4-5**
- optimization of reaction **TRL 4**
- optimized algae cultivation **TRL 3**

The table below shows the market maturity of the identified gaseous fuels, bio methane and hydrogen, based on their production processes. Furthermore, the table includes the distribution and fueling of hydrogen.

Market Readiness of Renewable Gaseous Fuels

Bio methane (first generation biofuel) is a biogas of natural gas quality, produced in bio chemical processes like fermentation of waste materials or energy crops or fermentation of lignocelluloses or via thermal process by gasification of biomass. Both processes for producing bio methane are well established and relatively mature. Currently, corn presents the most common form of plants being used for fermentation. In order to reduce the direct, upcoming conflict between food production and production of biogas, processes are ongoing to expand the amount of raw materials for lignocellulose-based fermentation. The production of bio methane out of waste materials is considered particularly ecological.

Respectively, thermal processes, especially the use of lignocellulose as a raw material, are of particular interest. This is done by producing synthesis gas out of biomass, which itself also represents a process step of the BtL-production. Bio methane is suitable as fuel for fleet operations in a local/regional view. A wider use of bio methane in passenger vehicles requires an extended infrastructure for the gas system. Before methane from fermentation can be fed into an existing natural gas grid, the producer gas from the fermentation must be purified. The market-ready but currently expensive process of feeding an existing natural gas grid with bio methane from fermentation makes the local use of biogas for heat and power generation particularly attractive. In addition, the amount of existing natural gas vehicles in some regions is still at a low level, although this number is increasing. Further, the upgrade of existing passenger vehicles to vehicles purely driven by bio methane, is still less attractive. A trend towards bivalent vehicles can be seen.

It should be mentioned that companies like Scania or Volvo are actively engaged in the development of gas engines for heavy duty applications.

On the other hand, bio methane can also be used as a raw material for the production of hydrogen. Therefore, bio methane must be transposed bio chemically (e.g. fermentation) into hydrogen.

Not all advanced fuels require the use of biomass – some can be produced without any biological input. Some of these fuels can offer significant carbon savings without any of the environmental impacts of biomass cultivation. The most widely known application is the use of hydrogen.

Hydrogen has the great advantage of its production in different pathways. Different pathways of H_2-production (local vs. peripheral, renewable, Power-to-Hydrogen) have to be developed and may as well be demonstrated. Hydrogen production for energy storage and grid balancing from renewable electricity, including large “green” hydrogen production, storage and re-electrification systems will be one of many goals in the next years. The initial focus will be on the role hydrogen can play in the integration of renewable energy sources into the grid.

A niche application will be the thermal process of biomass gasification. The most popular methods are the chemical processes by electrolysis of water and through reforming from (bio-)gas.

The potential carbon benefits from the production of hydrogen will only be obtained by using hydrogen derived from sustainable and environmentally friendly (low-carbon) processes such as water electrolysis, using renewable electricity. Currently, hydrogen is industrially produced by the reformation of natural gas. The decentralized, thermal conversion from biogenic raw materials into synthesis gas illustrates another possibility for manufacturing. In a next step, in small power plants, the synthesis gas can be converted under high pressure to pure hydrogen. This eliminates the problem of the hydrogen transport and the storage of large amounts of hydrogen at the delivery point. However, the aforementioned types of hydrogen production are in direct competition with the production process of other fuels (e.g. Fischer-Tropsch-process). This process also uses the synthesis gas as a starting point for its further processing. There are also attempts to produce hydrogen out of fermentation. Producing hydrogen in a central way has a huge disadvantage – its storage and distribution. Thus, the decentralized generation of hydrogen, by using electricity from wind or solar plants (to mention only a few possibilities), would reduce this problem. Much more, hydrogen could thereby be used as a form of storage for the fluctuating power generation from renewable sources (power-to-gas).

Due to the often complex production and storage of hydrogen, as a fuel it is only sustainable when great emphasis is placed on efficient conversion processes.

Austria has built up considerable know-how in establishing a viable, sustainable hydrogen fueling infrastructure including hydrogen test beds, logistics, distribution as well as compression and high pressure storage, cooling and dispenser technologies.

The set up of the hydrogen refueling infrastructure has been delayed because of the interdependence of infrastructure providers and vehicle manufacturers and by the imprecise nature of the time horizon for market maturity as well as the market volume for fuel cell technologies.

Furthermore, the European Parliament is aware of this dilemma and therefore prescribes in its directive 2014/94/EU an “appropriate number” of refueling stations by 2025: *“Member States which decide to include hydrogen refueling points accessible to the public in their national policy frameworks shall ensure that, by 31 December 2025, an appropriate number of such points are available, to ensure the circulation of hydrogen-powered motor vehicles, including fuel cell vehicles, within networks determined by those Member States, including, where appropriate, cross-border links.”*

The A3PS members therefore suggest that Austria should become part of an H_2-network with Germany, Italy, Slovenia and the Czech Republic, where a hydrogen infrastructure will be implemented and demonstrated with FCVs (including licensing) in the short term and not only in 2025.

Right now it is very difficult to benchmark a biofuel within the automotive sector. The biofuel market is very sensitive to global and regional policy targets, as well as market interventions such as subsidies. The price development is a major contributor to fluctuating market conditions of mineral oil and this is a key consideration in the benchmark of a biofuel. There is also the challenge of societal acceptance, which leads inevitably to further market variability.

Advanced fuels could offer greater carbon savings without the same concerns around food security and land use change. While the potential of these technologies is clear, they have not yet been widely commercialized. At present, the obligation to use renewable fuel as an addition to commercial fuels, only offers support for the supply of biofuels in road transport. In the future, it seems likely that advanced fuels will need to be used increasingly in sectors which are hard to decarbonize by other means, such as aviation and shipping. However, there is ever increasing attention being given to bio refinery concepts.

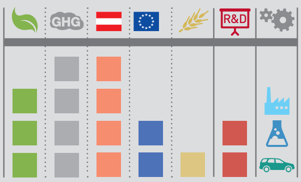
	Short Term 2015–2020	Medium Term 2020–2025	Long Term 2025+

Renewable Gaseous Fuels

Bio Methane by Biochemical Process

Bio Methane from Fermentation of Waste Materials

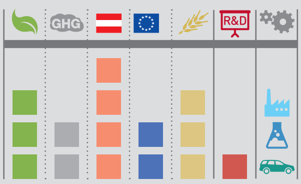
commercial decentralized systems (pilot plant available)



- process optimization for purer gas [higher methane content in the gas phase] **TRL 4**
- desulfurization **TRL 7**
- cost reduction **TRL 3**
- waste optimization **TRL 7**
- enzyme optimization **TRL 4**

Bio Methane from Fermentation of Energy Crops

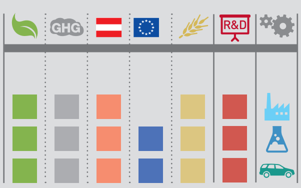
commercial decentralized systems (pilot plant available)



- cost reduction **TRL 3**
- optimized pressure process **TRL 3**
- development of cheaper gas conditioning technology **TRL 4**
- enzyme optimization **TRL 5**
- optimization of raw materials **TRL 4**

Bio Methane from Fermentation of Lignocellulose

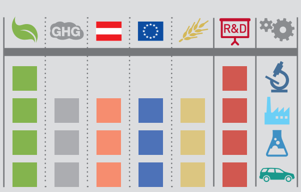
commercial decentralized systems (pilot plant available)



- optimization of the pretreatment **TRL 7**
- cost reduction **TRL 4**
- development of cheaper treatment technology for gas and lignocellulose crop residues **TRL 4**
- enzyme optimization **TRL 4**
- optimization of raw materials **TRL 4**

Biochemical Processes for the Production of H_2 e.g. Fermentation

commercial decentralized systems (laboratory scale)



- increase yield **TRL 3**
- attempts of H_2 production from sugar residues **TRL 5**
- search for new substrates for H_2 production **TRL 3**
- enzyme optimization **TRL 4**
- optimization of raw materials **TRL 4**

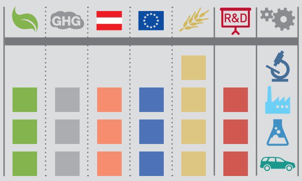
Short Term 2015–2020 | **Medium Term** 2020–2025 | **Long Term** 2025+

Renewable Gaseous Fuels

Bio Methane and Hydrogen by Thermal Process

Bio Methane from Gasification of Biomass

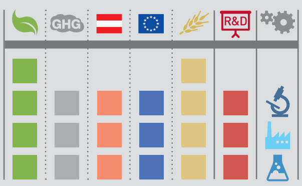
commercial decentralized systems (demo plant available)



- cost reduction **TRL 3**
- tars **TRL 5**
- process optimization **TRL 6**
- simplification of the process **TRL 7**
- new combustion process and exhaust after treatment **TRL 8**
- engine performance improvement **TRL 3**
- reduce the oil consumption (motor) **TRL 6**

Hydrogen by Gasification of Biomass

demo plant as addition to refinery/use of hydrogen from gasification in PEM FC



- efficiency **TRL 3**
- processing **TRL 7**
- process as a product for FC **TRL 4**
- process parameters **TRL 5**

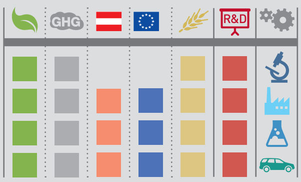
Short Term 2015–2020 | **Medium Term** 2020–2025 | **Long Term** 2025+

Renewable Gaseous Fuels

Hydrogen by Chemical Process

High-Temperature Electrolysis – SOEC

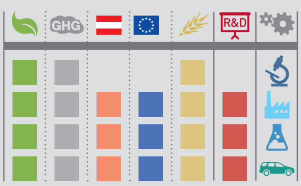
process technology/efficiency/cost reduction/increase of efficiency



- basis technology **TRL 2-3**
- process technology **TRL 3**
- high-volume electrolysis (0.5 to 10 MW) **TRL 3**
- cost reduction **TRL 2**

Prototype of a High Pressure PEM Electrolysis for Power Storage

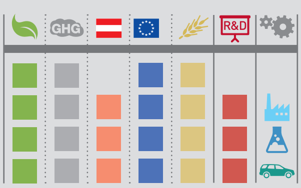
process technology/increase of efficiency/cost reduction



- saving of rare earth and precious metals **TRL 4**
- high-volume electrolysis (0.5 to 10 MW) **TRL 3**
- technical and economic system optimization **TRL 3**

Conventional Electrolysis (Low Pressure Electrolysis)

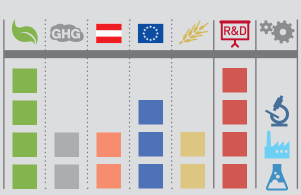
cost reduction/increase of efficiency



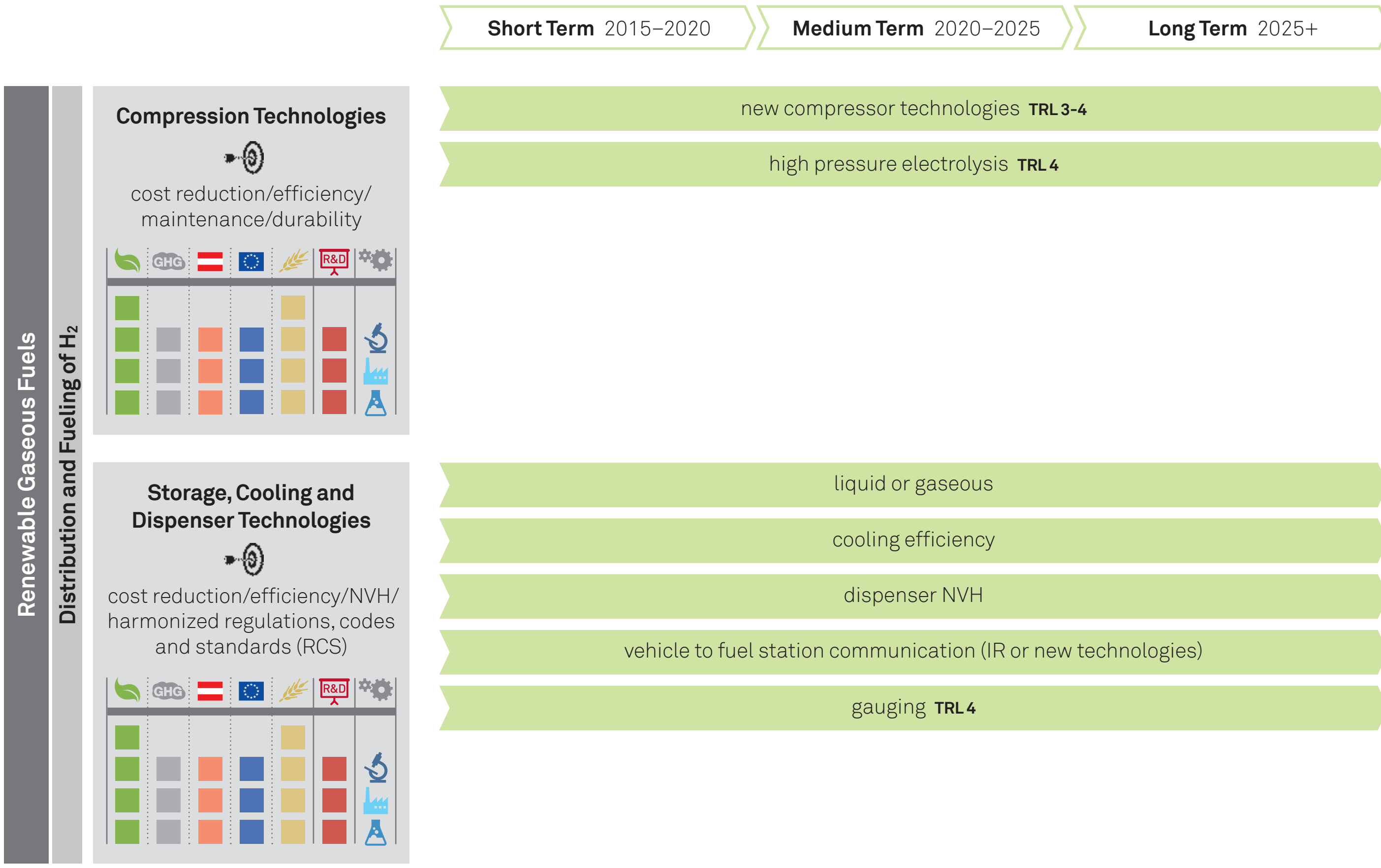
- high-volume electrolysis (0.5 to 10 MW) **TRL 7**
- technical and economic system optimization **TRL 7**
- scaling **TRL 5**

Hydrogen by Reforming from Biogas

commercial decentralized systems/system as addition to refinery/efficiency/technical and economic optimization



- processing **TRL 7**
- process as a product for FC **TRL 7**
- process parameter **TRL 7**
- catalyst research **TRL 4**



Legend

Benefit

- emission reduction TtW
- GHG reduction WtW
- competence in AUT
- EU targets
- availability of raw materials

R&D demand

Type of project required

- (material) fundamental research
- industrial research
- experimental development
- demonstration

Technology readiness levels (TRL)

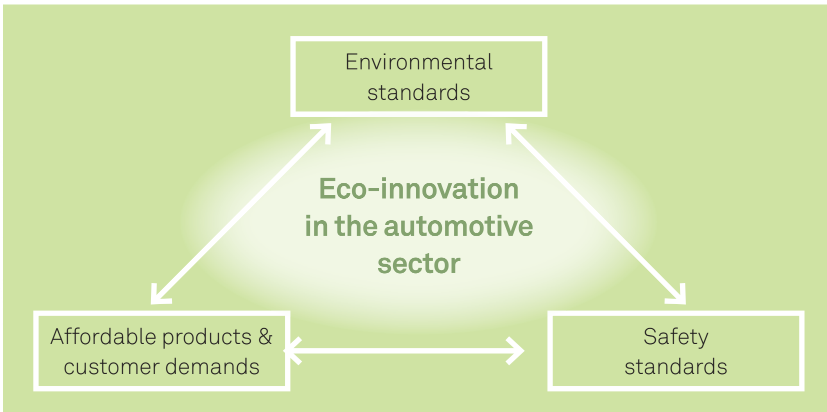
TRL 1: basic principles observed
TRL 2: technology concept formulated
TRL 3: experimental proof of concept
TRL 4: technology validated in lab
TRL 5: technology validated in relevant environment
TRL 6: technology demonstrated in relevant environment
TRL 7: system prototype demonstration in operational environment
TRL 8: system complete and qualified
TRL 9: actual system proven in operational environment

Life Cycle Assessment (LCA) for Transport Systems

The life cycle perspective as an intrinsic part of eco-innovation in the automotive sector

The automotive sector with associated up and down-stream industries and services is regarded as one of the major "engines" of the European economy. Its global competitiveness is, however, challenged by increasing pressures (see figure below): environmental and safety standards, performance and price demands from both consumers and European regulations – e.g. Frame-work Directive 2007/46/EC for the approval of motor vehicles, Directive 2009/1/EC with regard to the reusa-bility, recyclability and recoverability of motor vehicles, the "End of Life" Directive 2000/53/EC or the Renew-able Energy Directive 2009/28/EC. The response to these challenges are the development of sustainable technologies and eco-innovation in the automotive sector, as described in this roadmap.

The pressures driving eco-innovation in the automotive sector (Rademaekers 2011)



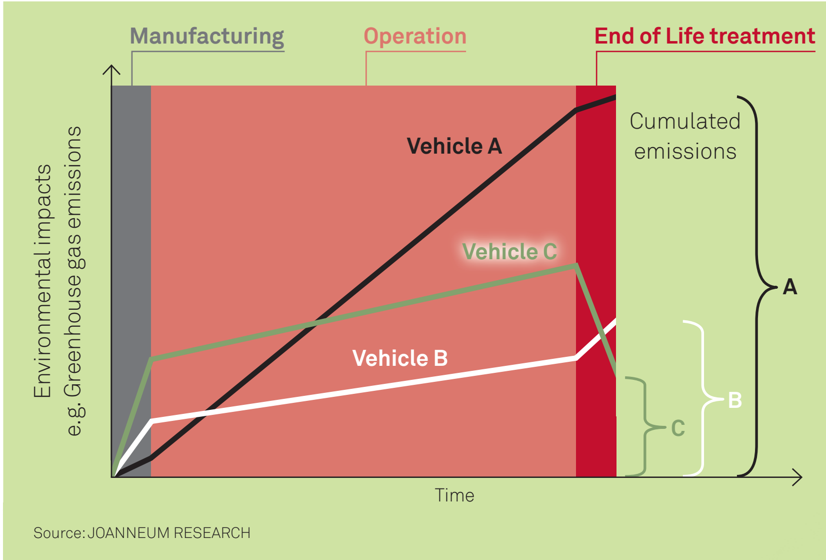
The key objective of eco-innovation is the efficient use of resources, including both energy and material resources. The efficient use of energy by advanced thermodynamic, hybrid and electric power trains as well as the use of renewable energy carriers all contribute to the sustainable development of the transportation sector. By substituting conventional vehicles and fossil-based fuels, environmental impacts as e.g. greenhouse gas (GHG) or particulate emissions are reduced. The efficient use of light and innovative materials such as carbon fibers, high-strength steel or aluminium also has the potential to meet environmental, safety and price demands. Material use efficiency needs to focus on both using the *right materials* by reducing the reliance on dwin-dling primary natural resources and looking for alter-native materials, as well as using the *materials right* by maximizing the (re-) use of the materials available (Rademaekers 2011).

Eco-innovation in the automotive sector includes technologies in all stages of a vehicle's life cycle from material production, vehicle manufacturing and its use, to the end of life treatment. Life cycle thinking has therefore become an intrinsic perspective of OEMs already during the research and development phase of eco-efficient and sustainable transport systems. Due to the diversity of power trains, energy supply chains and related bandwidth of environmental effects, the potential future contribution of transportation sys-tems to the improvement of sustainability must be evaluated on a scientific and robust basis.

The method of Life Cycle Assessment

There is an international consensus that the environ-mental impacts of transportation systems can only be analyzed by the method of Life Cycle Assessment (LCA) including the production, operation (incl. fuel supply and vehicle operation) and the End of Life (EoL) treatment of its elements (see figure below). The International Standard ISO 14040/14044 defines life cycle assessment as follows: Life Cycle Assessment is a method to estimate the potential environmental impacts of a company, product, or service. The envi-ronmental impacts of the various stages in the life cycle are investigated. The stages include extraction of raw materials, manufacturing, distribution, product use, recycling and final disposal (from cradle to grave).

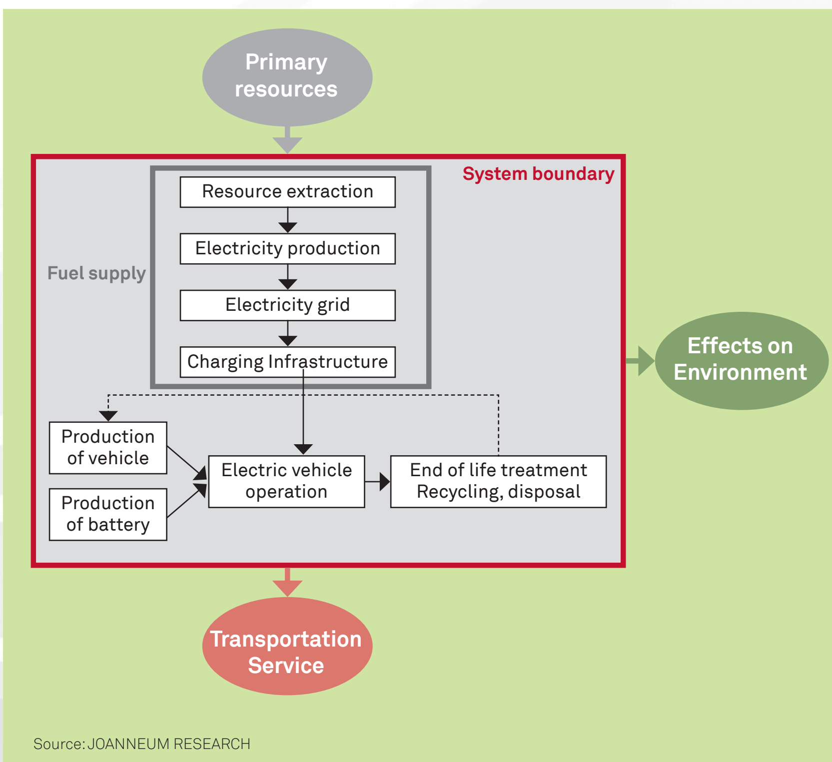
Life cycle assessment allows the comparison of different systems offering the same transportation service during the same time period and identifies those life cycle phases having the highest environ-mental impacts (see figure below).



Life cycle assessment of the three phases in the life cycle of a vehicle – production, operation (including fuel supply) and end of life treatment for 3 hypothetical vehicle types

There are three different hypothetical vehicle cases shown (A, B and C). Compared to vehicle B, vehicle A has lower environmental effects in the production phase, but higher environmental effects in the operation phase. However, the cumulative environmental effects of vehicle B are lower, as the higher initial effects of the production phase are compensated for by the lower effects in the operating and End of Life phase. Vehicle C has the highest environmental effects in the production phase, but as most of the components are recycled into secondary materials, a substitution credit is given for the avoided primary material production.

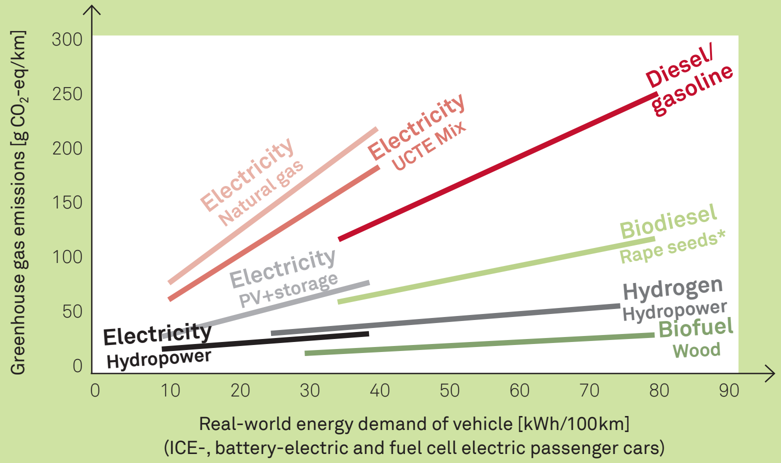
The figure below illustrates the elements and system boundaries of an electric vehicle's LCA. The system boundaries include all technical systems using and converting primary energy and material resources and resulting in a transportation service and having effects on the environment.



Example of a life cycle analysis (LCA) of an electric vehicle covering its whole value chain

Many transportation system LCA today focus on the most relevant environmental impacts which are GHG emissions and primary energy demand. The figure below presents the range of results for GHG emissions of selected transportation systems, depending on the specific GHG emissions factors of selected primary and secondary energy carriers [g CO_2-eq/kWh] and the range of real world energy demand of ICE, battery electric and fuel cell electric passenger cars, reflecting the different efficiencies of the power trains.

Range of results of GHG emissions for selected transportation systems

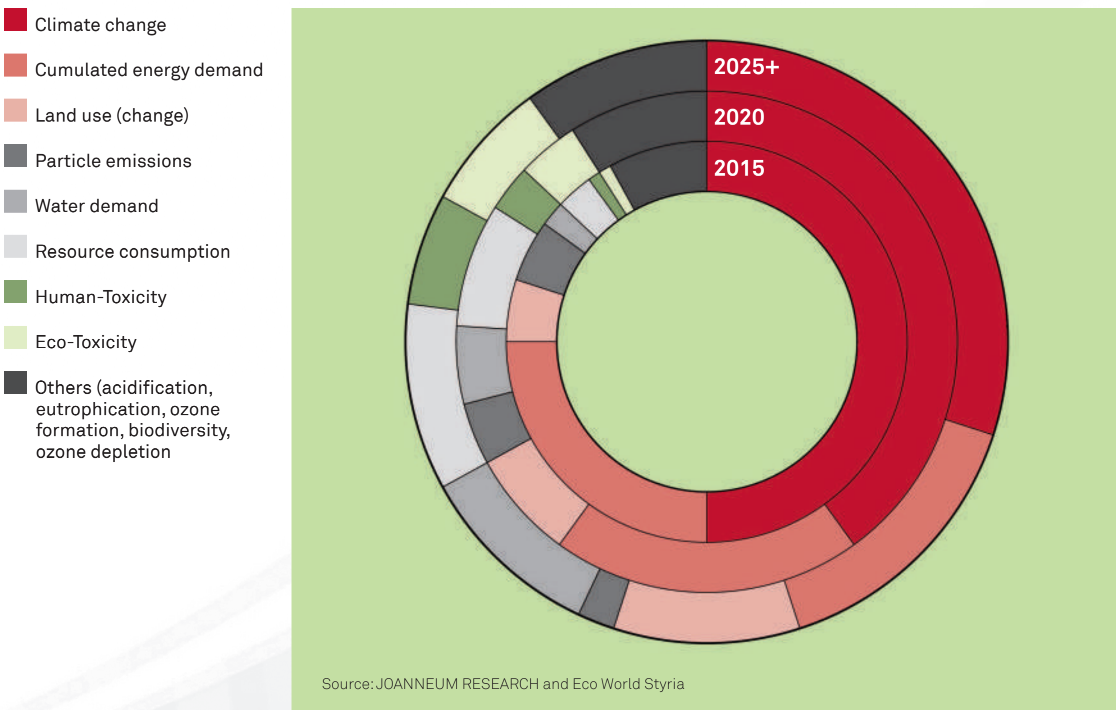


Source: LCA of passenger cars, JOANNEUM RESEARCH, *) without land use change

Besides GHG emissions and cumulated energy demand, which are the main goal of many LCA today, transportation systems have many other environmental effects in the total life cycle. The most relevant environmental effects are:

- Climate change/greenhouse gas emissions
- Fossil & renewable energy depletion
- Land use (change)
- Mineral and renewable resources depletion
- Water resource depletion
- Biodiversity
- Ozone depletion
- Human toxicity: cancer and non-cancer effects
- Acidification
- Particulate matter
- Freshwater eco-toxicity
- Ionizing radiations
- Photochemical ozone formation
- Terrestrial, freshwater and marine eutrophication

In the figure below, the expected development of the relevance of the various environmental impacts of transportation systems is shown, starting from 2015 to 2020 to the perspective of the roadmap of 2025+. GHG emissions and cumulated energy demand will generally remain in the foreground. The increasing relevance of additional impact categories may be mainly driven by the increasing scarcity and economic value of resources for vehicle manufacturing (impact category: resource consumption), new resource exploration areas and methods (impact categories: land use change, water demand, toxicity) and the production of biofuels (impact categories: land use change, water demand, toxicity).



Expected development of the relevance of the various environmental effects of transportation systems

LCA versus Well-to-Wheel and the Need for Harmonized and Sound Practice of LCA

The EC has started to integrate the life cycle approach in the automotive sector in the Renewable Energy Directive 2009/28/EC concerning the calculation of GHG emissions and energy use of vehicles. The EC has also published via its Joint Research Centre (JRC) the evaluation report "Well-to-Wheels analysis of future automotive fuels and power trains in the European context" (2003 with latest update 2014) as a reference for all European stakeholders. Both Directive and JRC evaluation refer to the so-called "Well-to-Wheel" (WTW) analysis.

WTW analysis, however does not provide the complete picture, since it includes the production of a fuel and its use in a vehicle, but, does not include the vehicle manufacturing and end of life treatment as does a LCA. The justification for excluding the vehicle stems from the understanding that associated environmental effects (GHG emissions and fossil energy use) are an order of magnitude less than fuel related environmental effects of gasoline ICE vehicles. For advanced vehicle technologies that utilize renewable energy carriers, fuel related environmental effects decrease while those from vehicle production might instead increase. To give an example, a gasoline ICE vehicle emitting 150g CO_2-eq/km in LCA has about 20g CO_2-eq/km coming from production and end of life of the vehicle. A battery electric vehicle using renewable electricity from hydropower has about 35g CO_2-eq/km of which about 30g CO_2-eq/km are derived from the production and end of life of the battery electric vehicle. Hence, both the vehicle and energy supply must be considered in a LCA.

A LCA in contrast to WTW-analysis therefore involves both additional material and energy conversion processes as well as environmental effects other than GHG emissions and fossil energy use (see figure above) – in particular local/regional environmental effects on ecosystems. This involves wider data sets and data calculations which require sound and harmonized handling if LCA shall provide transparent and comparable results for decision support.

In the light of current discussions about lacking transparency concerning the environmental performance of conventional vehicles, LCA is a valuable tool to support the environmental credibility of eco-innovation.

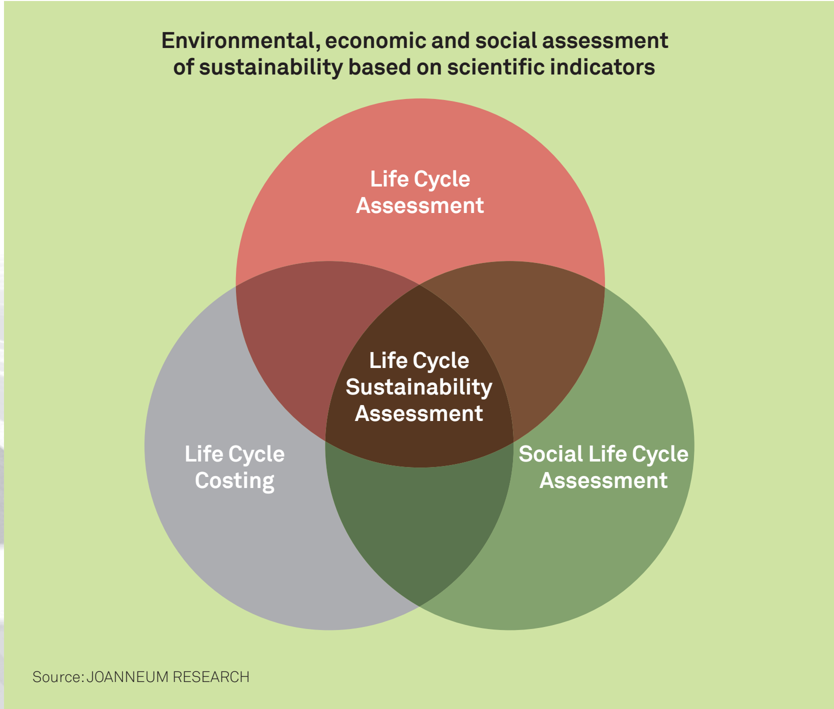
Austrian stakeholders in the automotive sector as front-runners in the development and manufacturing of eco-innovative technologies for vehicles and of renewable energy carriers can also become front-runners in providing transparent, comparable and – most importantly – fact-based metrics on the environmental performance of their products, based on LCA. Developing harmonized and sound Austrian LCA practice guidelines, tailored to the automotive sector, could also give an impulse to European-wide and international LCA method development and its practical application.

LCA as Part of the Life Cycle Sustainability Assessment

The environmental impact assessment using LCA is only one part of an overall sustainability assessment, which also includes economic and social aspects. It is generally agreed and accepted that a sustainability assessment of future transportation systems in comparison to existing conventional transportation systems must be based on a life cycle perspective, covering the entire value chains. The methodology used is the "Life Cycle Sustainability Assessment (LCSA)" as a combination of the three single methods (see figure below):

- ▶ Life Cycle Assessment (LCA) for the environment
- ▶ Life Cycle Costing (LCC) for the economy and
- ▶ Social Life Cycle Assessment (sLCA) for the society

The Methods of Sustainability Assessment



Life Cycle Sustainability Assessment (LCSA):

- **Environment:** LCA – Life Cycle Assessment
- **Economy:** LCC – Life Cycle Costing
- **Society:** sLCA – Social Life Cycle Assessment/SIA-Social Impact Assessment

In summary, the main messages in relation to LCA of transportation systems are:

- Environmental impacts include more than vehicle exhaust pipe emissions.
- There is international agreement that environmental impact assessment must include the entire life cycle from cradle to grave covering vehicle production, fuel supply, vehicle operation and end of life treatment. LCA includes more than WTW.
- LCA results in improved understanding of complex value chains and in fact-based knowledge for the development of new transportation systems that maximize environmental benefits.
- Today it seems that GHG emissions and cumulated energy demand are the most relevant impact categories in LCA of transportation systems. Other impact categories such as land use change, water demand or toxicity will become more relevant in LCA, due to the increasing scarcity and economic value of resources for future vehicles and alternative propulsion systems, new resource exploration areas and methods and due to the production of an increasing share of renewable fuels.
- The development of harmonized and sound Austrian LCA practice guidelines tailored to the automotive sector could ensure transparent, comparable and – most importantly – fact-based metrics based on a complete LCA. This could help to secure the position of the Austrian automotive industry also as front-running stakeholders proving that eco-innovation keeps its promises.

References: Rademaekers K., Asaad S., Berg J. 2011. Study on the Competitiveness of the European Companies and Resource Efficiency. Final report by Ecorys, Rotterdam.

Challenges

Technology-related challenges in the core area of power train, vehicle as well as fuel development were discussed in the previous chapters. Besides that, challenges that require actions in other disciplines such as politics, regulation as well as production technologies were identified. These challenges with their corresponding actions are summarized in the following table:

Challenges	Actions
Cost of Technology For a successful market introduction of advanced power train systems cost of key technologies like electrical storage, fuel cell and electrical components must be significantly reduced.	**Highly integrated propulsion system** Cost reduction through integration of mechanical assemblies and electrical components as well as scalability of power train systems considering the production/industrialization. **Minimize use of expensive materials** e.g. reduction of platinum in PEM fuel cells, rare earth, etc.
Series production and intelligent industrialization Alternative power train concepts require innovative, intelligent production methods in order to produce efficiently and in a cost-covering way, especially for smaller quantities.	**Development of innovative production processes** Development of production facilities for electric power trains to establish a value chain in Austria. New mechanical equipment to economically produce innovative products.
Independence of material shortages Electric power train and storage technologies require the increased use of special materials like rare earths, nickel, lithium, copper, platinum.	**Use of new materials** e.g. alternative magnet materials in the electrical machine, reduction of platinum in PEM fuel cells **Recycling of valuable materials** **New technologies** e.g. reluctance machine, separately excited machines
New Suppliers Due to the trend towards electrification of the power train, it is necessary to introduce companies mainly from the electronics sector to the automotive industry.	**Qualification process** To meet the high demands in the automobile industry, an appropriate qualification process must be established.
Ensure product quality and market-led product cycles New power train systems must meet all criteria such as functional safety, high product quality and efficiency. At the same time, sufficient short development times are required already at the first launch.	**Development of new simulation tools and measurement techniques** For new power train systems integrated tool chains need to be developed from simulation to series testing.
Control and regulation technology Future power train systems will be very much involved in their environment and infrastructure in order to maximize transport efficiency. This requires new control and regulation technology.	**Flexible on-board control software and standardized interfaces to the infrastructure** Development of modular and flexible control systems that can respond on environmental and infrastructure impacts via standardized interfaces.
Ensuring minimal use of energy and raw materials throughout the product life cycle Achieve maximum efficiency in terms of demand for raw materials and energy consumption during production, use and disposal.	**Providing unified measured values and evaluation tools** Definition of measured values for energy and resource efficiency as well as for the overall energy consumption (LCA, cradle to grave, WtW). Development of standardized evaluation methods and tools.
Reduce development time	**Simulation and Software** Software tools are needed to support technical potentials.
Harmonization	**International Approach** To avoid locally utilized isolated solutions, standards must be discussed in international committees. To represent Austria's interests and positions, participation in international committees is very important.

Requirements on Funding Instruments

To increase long term research and development in all areas addressed within this roadmap, industry companies require long-term and stable framework conditions and sufficient time for their R&D activities. Politics should therefore focus on a long-term strategy for funding instruments. In order to implement sustainable energy and road transport systems, an integrated approach across the disciplines is necessary.

The development of advanced propulsion systems and energy carriers needs a sufficient number of highly qualified personnel. Therefore, education for future automotive and energy engineers should include additional expertise in the fields of electrical/electronic engineering, electrochemistry, simulation, process and production engineering as well as material science.

Investments that even exceed the R&D cost are required for construction of production capacities as well as funding new and expanding existing enterprises.

In order to optimize funding instruments and their corresponding processes, the following general framework from the A3PS members' point of view was identified:

- Funding along the entire innovation cycle (including testing infrastructure, cost reduction and new production technologies)
- Technology-neutral, results-oriented calls
- Short and simplified evaluation processes
- Cooperative and interdisciplinary R&D projects
- Strengthened international cooperation in R&D
- Acceptance of partners from foreign countries into funded projects
- Differentiated funding rates from research to demonstration projects
- Performance-based, sufficient project periods
- Improved review process with feedback after the completion of the project
- Subsidies for establishing companies and stimulation of venture capital

Especially for Austria's supply industry, the international interlinking and exchange is of great importance. Furthermore, it is important to be involved in the different European and international strategy processes. Relevant for A3PS members are, among others:

- ERTRAC (European Road Transport Research Advisory Council)
- FCH-JU (Fuel Cells and Hydrogen Joint Undertaking)
- IEA (International Energy Agency)
- IPHE (International Partnership for Hydrogen and Fuel Cells in the Economy)

The interlinking and exchange of information between the bmvit, which represents Austria in the diverse platforms, and the A3PS members is one of the A3PS services.

List of Acronyms

3G, 4G, 5G	Mobile network generations
5G PPP	5G Public-Private Partnership
ABS	Anti-lock Braking System
ACC	Adaptive Cruise Control
ADAS	Advanced Driver Assistance Systems
AEB	Automated Emergency Braking
AI	Alcohol Interlock
Al	Aluminium
AMT	Automated Manual Transmissions
APU	Auxiliary Power Unit
AST	Accelerated Stress Tests
AT	Automatic Transmission
Beidou	Chinese satellite navigation system
BEV	Battery Electric Vehicle
BSG	Belt-Starter-Generator
BtL	Biomass-to-Liquid
C2C	Car-to-Car
C2I	Car-to-Infrastructure
C2x	Communication from car to x (e.g. car, infrastructure)
CAM	Cooperative Awareness Message
CFRP	Carbon Fiber-Reinforced Polymer
CHP	Combined Heat and Power
Cloud2V	Cloud-to-Vehicle
CNG	Compressed Natural Gas
CO	Carbon monoxide
CU	Control Unit
CVT	Continuously Variable Transmission
DC	Direct Current
DCT	Dual-Clutch Transmission
DENM	Decentralized Environmental Notification Message
DME	Dimethyl Ether
DPF	Diesel Particulate Filter
DSRC	Dedicated Short-Range Communications
DVM	Driver Vigilance Monitoring
EC	European Commission
EGR	Exhaust Gas Recirculation
EoL	End-of-Line/End-of-Life
ERTRAC	European Road Transport Research Advisory Council
ESC	Electronic Stability Control
ESP	Electronic Stability Program
ETSI	European Telecommunications Standards Institute
EU4, EU6, EU6c etc.	European Emission Regulations
FAME	Fatty Acid Methyl Ester
FC	Fuel Cell
FCC	Fluid Catalytic Cracking
FCH-JU	Fuel Cells and Hydrogen Joint Undertaking
FCV	Fuel Cell Vehicle
FMI	Functional Mock-up Interface
FMU	Functional Mock-up Unit
FT	Fischer-Tropsch
GALILEO	GNSS currently being created by the European Union (EU) and Space Agency (ESA)
GHG	Greenhouse Gas
GLONASS	Global Navigation Satellite System, operated by the Russian Aerospace Defence Forces
GNSS	Global Navigation Satellite System
GPS	Global Positioning System
H_2	Hydrogen
HC	Hydrocarbon
HCCI	Homogeneous Charge Compression Ignition
HDO	Hydrodeoxygenation

HEV	Hybrid Electric Vehicle
HiL	Hardware in the Loop
HMI	Human Machine Interfaces
HV	High Voltage
HVAC	Heating, Ventilation and Air Conditioning
HVO	Hydrogenated oder Hydrotreated Vegetable Oils
I2C	Infrastructure-to-Car
ICE	Internal Combustion Engine
IEA	International Energy Agency
IEEE	Institute of Electrical and Electronics Engineers
IHS	Information Handling Services
IPHE	International Partnership for Hydrogen and Fuel Cells in the Economy
IR	Infrared
ISO	International Organization for Standardization
IT	Information Technology
ITS-G5	Commonly used term for IEEE 802.11p standard
JRC	Joint Research Centre
KERS	Kinetic Energy Recovery System
LCA	Life Cycle Assessment
LCC	Life Cycle Costing
LCSA	Life Cycle Sustainability Assessment
LFP	Lithium Ferrophosphate
Li	Lithium
LIDAR	Light Detection And Ranging
LKA	Lane Keeping Assist
LNG	Liquefied Natural Gas
LTE	Long-Term-Evolution
LTO	Lithium Titanate Oxide
MBSE	Model-Based Systems Engineering
Mg	Magnesium
MSC	Metal Supported Cell
MT	Manual Transmission
MW	Megawatt
N_2	Nitrogen
NCAP	European New Car Assessment Programme
NEDC	New European Driving Cycle
NMC	Nickel Manganese Cobalt
NOx	Mono-nitrogen oxides (NO and NO_2)
NVH	Noise, Vibration and Harshness
O_3	Ozone
OBD	On-Board Diagnostics
OEM	Original Equipment Manufacturer
OME	Oxymethylene Ether
ORC	Organic Rankine Cycle
PBA	Predictive Brake Assist
PEM	Polymer Electrolyte Membrane
PF	Particulate Filter
PHEV	Plug-in Hybrid Electric Vehicle
PM	Particulate Matter
PMD	Photonic Mixing Device
PN	Particle Number
PPP	Public–Private Partnership
R&D	Research and Development
RADAR	Radio Detection And Ranging
RCS	Regulations, Codes and Standards
RDE	Real Driving Emissions
RED	Renewable Energy Directive
REX	Range Extender
SAE	Society of Automotive Engineers
SCR	Selective Catalytic Reduction
SIA	Social Impact Assessment
sLCA	Social Life Cycle Assessment
SLS	Speed Limiting Systems
SOEC	Solid Oxide Electrolyser Cell
SOFC	Solid Oxid Fuel Cell

TC	Torque Converter
TOF	Time Of Flight
TRL	Technology Readiness Level
TtW	Tank-to-Wheel
UMTS	Universal Mobile Telecommunications System
UNECE	United Nations Economic Commission for Europe
V2Cloud	Vehicle-to-Cloud
V2I	Vehicle-to-Infrastructure
V2V	Vehicle-to-Vehicle
VDA	*Verband der Automobilindustrie*
ViI	Vehicle integration into Infrastructure
VRU	Vulnerable Road Users
WAVE	Wireless Access in Vehicular Environments
WiFi	WLAN product based on IEEE 802.11 standards
WLAN	Wireless Local Area Network
WLTP	Worldwide harmonized Light vehicles Test Procedures
WtW	Well-to-Wheel
x by wire	Electrically actuated and electronically controlled components
xCU	Any Control Unit
XFCD	Extended Floating Car Data
xiL	Model, software or hardware in the Loop

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