Efficient Automation of an HEV Heterogeneous Fleet using a Two-Stage Methodology

Fernando V. Cerna, Mahdi Pourakbari-Kasmaei, Member, IEEE, Matti Lehtonen, and Javier Contreras, Fellow, IEEE

Abstract—An influential factor in enhancing the attendance services, mainly in commercial and emergency sectors, is the vehicular technology used to transport people, goods, or equipment. Although hybrid electric vehicles (HEVs) represent a sustainable transport alternative, the existing technical limitations such as battery and fuel capacities, and autonomy, among others, highlight the provision of an efficient automation tool. The tool can serve to enhance the operational performance of the HEV by selecting the proper driving mode (on fuel or electricity), and the navigation strategies to the delivery and charging points in urban areas. This paper proposes a two-stage methodology that allows the HEVs operators to automate the operational performance of a heterogeneous HEV fleet on a city map. Each stage is handled by the HEVs operators to automate the operational performance of a fleet, ensuring a significant reduction of energy usage as well as mitigating the CO₂ emissions.

Index Terms—Attendance services, Battery charging, HEV heterogeneous fleet, operating strategy.

NOMENCLATURE

A. Sets and indices

- \( k, i, d, e, u \) Indexes stand for intersections \( i/k \), delivery, HEV technology, and density value, respectively.
- \( op, ps \) Indexed of operation, and operating strategy
- \( \alpha_{i}, D_{e} \) Set of deliveries points \( d \) and HEV technologies \( e \).
- \( \alpha_{op}, \alpha_{ps} \) Set of operations \( s \) and operating strategies \( v \).
- \( \alpha_{D} \) Set of density values \( u \).

B. Parameters

- \( a_{u} \) Autonomy value of HEV \( e \) (km).
- \( b \) Linear battery degradation cost-intercept parameter.
- \( B_{e} \) Battery capacity of the HEV \( e \) (kWh).
- \( B^{k} \) Battery lifetime in years.
- \( C_{e} \) Capacity of HEV \( e \) (quantity of goods that can be transported by HEV \( e \)).
- \( C^{P} \) Battery cost ($/kWh).
- \( C^{L} \) Capacity fade at end of life.
- \( l_{ki}, D_{ki} \) Length of road \( k \) (km), and the corresponding traffic density (veh/km).
- \( D_{u} \) Value of the traffic density of element \( u \) (veh/km).
- \( D_{l} \) Saturation density value (veh/km).
- \( D_{0} \) Optimal density value related to \( F_{\max} \) (veh/km).
- \( e_{CO_{2}} \) CO₂ emissions of HEV \( e \) (gCO₂/km).
- \( F_{\max} \) Maximum traffic flow value (veh/h).
- \( F_{\max}^{sr} \) Maximum traffic flow value on secondary roads (veh/h).
- \( F_{\max}^{main} \) Maximum traffic flow value on main roads (veh/h).
- \( k_{C} \) Fuel capacity (L).
- \( m \) Linear battery degradation cost-slope parameter.
- \( M \) Big value used as part of the constraints linearized.
- \( M_{e,s,v}^{def} \) Hyper-matrix related to the deliveries \( d \) in operating strategy \( v \) of the operation \( s \) to be performed by HEV \( e \).
- \( M_{e,s,v}^{ob} \) Hyper-matrix related to the objective function values of operating strategy \( v \) for operation \( s \) of HEV \( e \).
- \( N_{d} \) Total number of points to be visited (delivery points and warehouse).
- \( p_{ch}^{s} \) Charging rate of HEV \( e \) (kW).
- \( p_{u}^{mr/sr} \) Probability values related to \( D_{u} \) at main/secondary roads, respectively.
- \( p_{u}^{arr/arr} \) Accumulated probability value related to \( P_{u}^{mr} \) or \( P_{u}^{sr} \).
- \( r_{i}^{s} \) Type of intersection \( i \) (1: if the intersections has a charging station, otherwise 0).
- \( SOC_{e}^{i} \) Initial SoC of the battery of HEV \( e \) (kWh).
- \( t_{d,i}^{n} \) Indicates the type of intersection \( i \) at delivery \( d \).
- \( t_{k,i}^{ur} \) Indicates the type of road \( k \) (1: main; 0: secondary).
- \( U_{e}^{op} \) Quantity of goods to be demanded in operation \( s \).
- \( v_{k,i}^{s} \) Maximum average speed value of road \( k \) (km/h).
- \( v_{f} \) Free flow speed value (km/h).
- \( v_{0} \) Optimal speed value related to \( F_{\max} \) (km/h).
- \( v_{0}^{mr/sr} \) Optimal speed related to \( F_{\max}^{mr} \) or \( F_{\max}^{sr} \) (km/h).
- \( \delta_{nt}, \delta_{s} \) Weighted weights related to total navigation time, and battery lifetime.
- \( \delta_{ue} \) Extra units cost ($/units).
- \( \beta \) Parameter for defining the nodes status of \( t_{d,i}^{n} \) (-1: starting node; 0: intermediate node; 1: arrival node).
- \( \delta_{c} \) Fuel consumption rate (km/L).
- \( \rho \) Percentage of CO₂ emissions reduction.

F. V. Cerna is with the Department of Electrical Engineering, Federal University of Roraima (UFRRR), Av. Cap. Ené García, n° 2413 - Aeroporto, Boa Vista - RR, 69310-000 (e-mail: tcvema83@gmail.com).

Mahdi Pourakbari-Kasmaei, and Matti Lehtonen are with the Department of Electrical Engineering and Automation, Aalto University, Maariatie 8, 02150, Espoo, Finland (e-mails: Mahdi.Pourakbari@aalto.fi, Matti.Lehtonen}@aalto.fi).

Javier Contreras is with the E.T.S. de Ingenieros Industriales, University of Castilla-La Mancha, 13071 Ciudad Real, Spain (e-mail: Javier.Contreras@uclm.es).
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o socio-environmental factors [5], [6]. Basically, HEVs present a promising alternative in the transportation sector, mostly due to automation strategy during their operation [3], [4].

Studies show that among EV-based technologies, the HEV is increasing sharply after 2020 due to the projected increase in sales of new electric vehicles (EVs) and hybrid electric vehicles (HEVs) [1]. In this context, service sectors, mainly commercial (e.g., postal, merchandise, home care, etc.) and emergency (e.g., ambulances, fire engines, police vehicles, energy company cars, etc.), can have a positive influence, since the quality of their attendance depends largely on the vehicular technologies used to transport people, goods and/or equipment in urban areas [2]. These services present several challenges such as minimizing delay times, managing fuel consumption, selecting the most appropriate route, etc., thereby affecting the vehicle fleet performance. These challenges highlight the crucial role of electric vehicles and the operational and sustainable aspects to be considered within an efficient automation strategy during their operation [3], [4].

Studies show that among EV-based technologies, the HEV is a promising alternative in the transportation sector, mostly due to socio-environmental factors [5], [6]. Basically, HEVs present two driving modes during navigation such as 1) Charge-Sustaining Mode (CSM), and 2) Charge-Depleting Mode (CDM). In CSM, the internal combustion engine drives the HEV, whereas, in CDM, the electric energy of the battery is used for driving purposes [7], [8]. If a fleet of HEVs is used to transport goods, their capacity and performance are determining factors that must also be considered in the automation of this particular type of service. Therefore, depending on the quantity of goods, location of supply points and scheduling of operations, proper technology should be assigned. This reveals the significant role of smart tools that ensure the efficient automation of an HEV heterogeneous fleet considering the optimal CSM/CDM selection, optimal battery management, optimal deliveries scheduling, and environmental issues. Also, the uncertainties due to the variation in traffic density for each road on the urban map, as well as speed limits on roads and sustainable performance of HEVs should be considered in the automation tool [9], [10].

In the literature, most of the existing works related to HEV fleets merely consider the optimal charging or fuel consumption management. In [6], to fulfill the economic criteria of autonomous EVs charging in a city with a predefined spatial limit, a Monte Carlo simulation-based approach was proposed. A mixed-integer linear programming (MILP) model was developed in [11] to coordinate the charging and power storage in the battery of the HEV fleet. In order to optimize the charging profile in the predefined charging points, an energy management system for EV fleet operators was proposed in [12]. In [13], a sensitivity analysis has been done to find the optimal charging process of the EV fleet and the flow exchange between the power grid and EVs. In [14], optimal recharging of EVs considering the different habits of owners was a part of a smart microgrid project in order to manage energy usage, fuel costs, and carbon dioxide emissions, while, as a storage device, addressing the fluctuations of renewable energy output. In [15], a predictive management system was proposed for optimal charging of the HEVs fleets while the charging station was equipped with PVs taken into account the distribution network restrictions. Decentralized control strategies and mathematical programming models for the charging of an EV fleet were developed in [16] and [17]. In [18], an adjustable robust optimization model considering a set of charging stations, travel costs, and battery capacities was investigated. In [19], [20], aiming at minimizing the charging costs, proper policies and charging strategies to determine the optimal scheduling considering historical data were developed. To fairly address the optimal scheduling of EVs, the economic charging and battery degradation were co-optimized in [21] via the Pareto front technique. The EV charging rates were modeled via partial differential equations under three conditions: 1) EVs receive energy from the grid, 2) EVs are connected to the grid but not charging, and 3) EVs deliver energy to the grid, was considered in [22]. Optimal charging scheduling of taxi fleets was presented in [23] while taking into account the charging station locations, unpredictability and balancing issues. Although the aforementioned works highlight the importance of EV charging scheduling, energy management of both EV fleets and charging points and their impact on the electricity grid, both the route as well as the uncertainties involved during navigation of each EV were not part of their focus, while the navigation modes, emissions reduction during navigation, and the EV type (heterogeneous fleet) were also neglected.

In order to fill the aforementioned existing gaps, the performance of EVs and HEVs has been investigated in some works. The integration of thermal power generation units as a support system for PHEV charging has been studied in [24] aiming at minimizing the emissions, especially during peak demand periods. A comparative study on the fuel consumption and emission output of conventional HEVs and plug-in HEVs
were conducted in [25] while taking into account the interaction between the energy storage system, electric machine, power control unit and internal combustion engine. An energy management and vehicle control models were proposed in [26] to simultaneously reduce the fuel consumption and polluting emissions of the HEVs by taking into account the information related to a city road network. In [27], a neural network-based dynamic online programming strategy was used to minimize the fuel consumption of PHEVs where the real-time information, i.e., traffic and control signal, was interchanged between the vehicles and the control center. A management strategy based on the performance of Toyota Prius was investigated in [28] to control the pollutant effects of CO₂ emissions. Internal power flow and its efficient management in the HEV powertrain were analyzed in [29] and [30]. In [29], the limits of the power grid and the waiting and charging times by HEV were considered, while in [30], travel speed, energy level, and stop-and-go frequency were addressed. However, still, there is a lack of smart tools for an effective route and delivery schedule to manage the costs and emissions more effectively.

Investigations related to the determination of the optimal routes, deliveries, and transport capacity of vehicle fleets were addressed in a few works. A mixed-integer quadratically constrained programming (MIQCP) model was proposed in [31] aimed at minimizing the fuel and the recharging costs of the EV fleet in urban areas. However, in this MIQCP model, the traffic density on the main and secondary roads, the direction of the roads, which can be one- or two-way in real-world urban areas, as well as the autonomy of EVs were disregarded. Such oversimplification results in an impractical and unrealistic outcome. In [32], a mathematical formulation for the service network design of a heterogeneous fleet was developed. This formulation considered a set of delivery points with predefined demand and the required time in the scheduling process to reveal the importance of considering a heterogeneous fleet as part of a service network. However, this paper did not take into account the attendance sequences, route types in the transportation network, and aspects related to the sustainable operation of the fleet, i.e., the presence of BEVs, HEVs, or PHEVs. In [33], a mixed-integer linear programming (MILP) model was proposed to solve the vehicle routing problem of the heterogeneous fleet while minimizing the total transportation costs considering a set of vehicles with their transport capacity attending a limited number of customers. A combined energy management strategy, i.e., electricity and fuel consumption, based on frequent route data was developed in [34]. The model considered a set of HEVs and the information related to global positioning and routes while disregarding the location of charging stations and operational characteristics such as navigation time and within urban areas. In [35], to satisfy the transport demand in a given geographical area, a MIQCP model was proposed to guarantee the minimum distance of a fleet of EVs. Although a pure battery fleet represents nearly-zero emissions, its optimal performance is questionable due to the battery charging times and lack of flexibility. In the aforementioned works, the problem of optimal routing considering the transport capacity of vehicular fleets was addressed. However, studies involving the environmental issue and the use of EVs/HEVs heterogeneous fleet as sustainable forms of transport in the service sector are scarce in the literature.

Works related to EVs and HEVs considering charging batteries and navigation routes for deliveries were developed in [7], [8], [36]. It is worth mentioning that the main motivation of our proposed model is to fill the existing gaps in these works. The authors in [7] and [8] addressed the performance of HEVs during navigation taking into account the driving modes. In [7], the automation of HEVs driving modes within an urban area was addressed via an MILP model taking into account traffic density variations in main and secondary urban roads. In [8], the trip information, charging stations along with path planning, were considered to minimize the fuel consumption by selecting the most appropriate driving mode. The model was handled by dynamic programming for offline mode, while a novel algorithm, namely online, was used for real-time optimization purposes. In [36], the optimal operation of a fleet of EVs was guaranteed via a MILP model considering a predefined number of deliveries to be made within a city map. In this model, the shortest distances and minimum operating times of the EVs for each delivery was targeted. However, due to long battery charging times in purely battery-based EVs, it represents an operational limitation in the commercial service and emergency sectors. In contrast, HEVs that have different driving modes represent a more promising alternative in these sectors. To this end, four HEV technologies were tested in [37] via a MILP model that aims to optimize maintenance costs while guaranteeing the CO₂ emission reduction. In this work, the performance of each HEV belonging to the fleet was evaluated individually by the proposed model. In these approaches, the transport capacities of the EVs and HEVs, as well as the selection of the best operating strategy, were not considered.

Consequently, in order to fill the aforementioned existing gaps, this paper proposes a two-stage methodology for the efficient automation of an HEV heterogeneous fleet that enables the service operators to ensure the optimal operational strategy of the vehicle fleet during deliveries. In the first stage, all the operating strategies related to the performance of each type of HEV are determined taking into account the optimal selection of CSM and CDM, as well as a set of constraints related to CO₂ emissions level, SoC of HEVs and deliveries scheduling aiming at minimizing the maintenance and overtime costs. In the second stage, the best operating strategy for a type of HEV technology considering constraints related to the goods supply capacity is obtained. Uncertainties, due to traffic density variation in the operation of HEV, are modeled considering the probability values corresponds to the levels of service (LOS). The model of the urban map presents a graph with 412 nodes (intersections between main and secondary roads) and 832 roads. In order to obtain more realistic results of the HEV heterogeneous fleet during operation on the urban map, real-data of the existing HEVs technology are anonymously used. Our work goes beyond the models proposed in [7], [36], and [37]. In [7] and [37], investigations related to the performance of HEV technologies were carried out and in [36] the management of a homogeneous fleet of EVs was developed. These technologies have less robust batteries and different
modes of navigation, thus allowing to optimize the delivery and charging time during the operation of HEV. The proposed approach ensures the efficient automation of the HEV heterogeneous fleet during the navigation considering CO2 emissions reduction, and the goods supply capacities associated with the type of HEV technology. In order to find the optimal solution, the AMPL [48] software is used for implementation purpose while the model is solved via the commercial solver CPLEX [49].

The main contributions of this paper over the existing works in literature are summarized as follows.

- Proposing computationally-efficient MILP models for the proper automation of the HEV heterogeneous fleet considering CO2 emissions reduction.
- Investigating the potential impact of using various HEV technologies in the service sector considering their supply of goods capacities and sustainable modes of navigation that guarantee the optimal using of the battery.
- From a sustainable standpoint, the application of this smart tool contributes to reducing dependence on fossil fuels as well as the minimization of polluting gases in urban centers.

The remainder of this work is organized as follows. The hypothesis and stochasticity in the HEVs operation are presented in Section II. Optimization models and the linearization process are presented in Section III. Section IV explains in detail the proposed methodology. Section V presents the numerical example and results. Conclusions are given in Section VI.

II. SIMULATION SETUP

In this section, first, a general explanation of the primary requirements of the automation strategy for transportation purposes is provided. Then, the main hypotheses of the proposed model, the location of charging stations and delivery points, as well as the uncertainties associated with the HEV are explained in detail.

The HEVs automation strategy should take into account the basic information [38], see Fig. 1. As can be seen, the service operators require some information of the urban areas, namely offline information such as location of the warehouse, delivery points and the number of goods to be delivered, and charging stations, and online information such as the traffic density in the urban roads [38], [39]. Then, a set of deliveries is assigned to each HEV of the fleet considering its transport capacity, i.e., the quantity of goods that the HEV can transport, and hybrid technology characteristics, e.g., SoC, battery capacity, fuel tank capacity, autonomy, etc. Fig. 2 is used to illustrate the assignment and delivery of goods, and the operational strategies in the delivery process [36]. There exist a set of deliveries, i.e., delivery 1 to 4, differentiable in quantities and types of goods that influence the HEV selection. The operator analyzes all the possible operational strategies and the sequences in which the goods will be delivered, the urban routes to be traversed as part of the total delivery route, i.e., Route 1 to 5, as well as the charging points to be visited during navigation for charging purposes [7]. Considering all these aspects during the HEV navigation, from starting and returning to the warehouse, results in a highly complex model.

A. Hypotheses

In the proposed approach, the following hypotheses are used to adequately model the problem.

1. In the urban map, the locations of all the deliveries and charging points are predefined.
2. There is only one point within the urban map that the HEVs departure and arrive, namely the warehouse.
3. Each urban road is subject to a speed limit as a consequence of uncertainties in the traffic density.
4. The costs due to the degradation of the battery present a linear behavior based on the SoC of each HEV.
5. An operation consists of a given number of delivery points to be visited.
6. An operating strategy consists of a specific sequence in which the delivery points are visited.
TABLE I

<table>
<thead>
<tr>
<th>LOS</th>
<th>A</th>
<th>B</th>
<th>C</th>
</tr>
</thead>
<tbody>
<tr>
<td>$D_{u}$ (veh/km)</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

Fig. 3. Urban map containing 412 intersections and 832 roads.

Fig. 4. Cumulative probability behavior and traffic density values for each urban road $ki$.

B. Location of Charging Stations and Delivery Points

In this work, to model the locations of charging stations and delivery points [36], [40] are used where the urban map presented in [36] is extended to a large-urban map, as depicted in Fig. 3. The main and secondary urban roads are differentiated by $v_{ki}$ and are represented by gray and dashed lines, respectively [7]. In this figure, the charging stations are presented with gray squares, and the distance between two consecutive stations is approximately five kilometers. The charging stations in the secondary roads are located at the intersections $i$ ($r_{i} = 1$) near the main roads and by the city perimeter. The green-filled triangles and empty stand for the warehouse and delivery points, respectively. Locations of the warehouse, charging, and deliveries, as well as the length of the roads on a large-urban map, are available in [41].

C. Modeling of Uncertainties

This paper considers the uncertainties correspond to the variation of traffic density (vehicle per kilometer), as a stochastic phenomenon, on a given road. The traffic density affects the speed limit of the HEVs in a road [36], [42]. Traffic density values linked to the LOS are used to simulate these uncertainties.

In practice, to represent the LOS, six letters A-F are used [43] where the difficulties that the HEV driver will have along an urban road are increased from A to F. In order to portray this

stochastic difficulty, in this work, the uncertainties are simulated based on the first three usual levels such as A (low traffic density, car drivers have complete mobility on the roads), B (reasonable traffic density, slightly restricted maneuverability) and C (high traffic density, traffic density is restricted and driver needs high concentration) [44], [45]. Table I shows the cumulative probability values to be adopted [7]. The values of $P_{a}^{mr}$ or $P_{u}^{mr}$ are calculated considering that each urban road $ki$ has the same probability, e.g., as can be seen in Table I, there exist 11 subcases in total (3 subcases in level A, 4 subcases in level B, and 4 subcases in level C), the probability is $1/11$. These probabilities are assigned to the given values of $D_{u}$. Thus, the accumulated probability values, $P_{u}^{mr}$, are obtained by adding up the probability values, $P_{u}^{mr}$, in each subcase, e.g., in subcase 3 it will be calculated as $1/11 + 1/11 + 1/11 = 3/11$, as can be seen in Table I. Therefore, in the main urban roads, the lower values of $P_{a}^{mr}$ are related to a lower quantity of traveled vehicles per kilometer, $D_{u}$, while the higher probability values are considered for higher traffic density (see Fig. 4). This fact ensures the representation of higher vehicle flow on the main roads that makes the operational performance of HEVs more complex.

The cumulative probability curves of $P_{a}^{mr}$ and $P_{u}^{mr}$, on the left side of Fig. 4, is used to extract the accumulated probability values of traffic density presented in Table I. This way, on the secondary urban roads, the behavior of a lower vehicle flow is related to a higher probability, thus, with a lower probability, the situations in which a secondary road presents a higher traffic density are characterized. The cumulative probability values are used to assign the density values, $D_{u}$, to all the main and secondary roads [7], [37]. Fig. 5 represents the proposed algorithm to simulate uncertainties related to traffic density variation, where $v_{o}^{mr}$ and $v_{u}^{mr}$ are set to 60 and 30, respectively. The number of iterations is equal to the number of roads in the urban map. This algorithm starts with pre-defined values for parameters $P_{a}^{mr}$, $P_{u}^{mr}$, $D_{u}$, $D_{l}$, $v_{o}^{mr}$, $v_{u}^{mr}$, while $D_{u}$ and $v_{u}^{mr}$ are initialized to zero. Nonzero random values within interval [0,100] are assigned to $n_{ai}$; the condition, $n_{ai} \neq 0$ is evaluated to guarantee the nonzero value. Then, to start the iterative process for calculating $v_{ai}$, type of roads are differentiated via
checking the condition $t^{ur}_{d_{ki}}$. If the condition $t^{ur}_{d_{ki}}=1$ is satisfied, then the process belongs to the main roads otherwise this process is used for the secondary roads ($t^{ur}_{d_{ki}} = 0$). Note that the iterative process is similar for both roads, it is only required to consider the values correspond to them, $P^{amr}_{d_{ki}}/P^{assr}_{d_{ki}}$ and $v^{ur}_{d_{ki}}/v^{ur}_{d_{ki}}$. Therefore, the detail explanation of this iterative process is provided for the main roads. If $u=1$, $n^{al}_{d}$ is assessed under the condition $0 \leq n^{al}_{d} \leq P^{amr}_{d_{ki}}$, and if this condition is satisfied, $D_{d_{ki}}$ is assigned to $D_{d_{ki}}$ and $v_{d_{ki}}$ is obtained. Otherwise, for $u>1$, the condition $P^{amr}_{d_{ki}} \leq n^{al}_{d} \leq P^{amr}_{d_{ki}}$ is used to evaluate $n^{al}_{d}$, and if this condition is satisfied, $D_{d_{ki}}$ is assigned to its respective $D_{d_{ki}}$ and $v_{d_{ki}}$ is calculated. This internal iterative process terminates when the stopping criterion $u=[n_{d_{ki}}]$ is met, and then the algorithm checks whether the process has been done for all roads. At the end of this iterative process, the values of $v_{d_{ki}}$ for each road $d_{ki}$ on the urban map are obtained. This value is used in the first term of (1).

III. PROPOSED MODEL

In this section, the mathematical formulation of the proposed two-stage model is presented in detail.

A. First-stage: MINLP Model

The problem of this stage is represented via a mixed-integer nonlinear programming (MINLP) model (1)–(16).

$$\min: \varphi_1 + \delta \varphi_2$$

subject to:

$$\sum_{v \in D_{d_{ki}}} \omega_{e,d,ki} - \sum_{v \in \Omega_{d_{ki}}} \omega_{e,d,ij} = \beta,$$

$$l_{d_{ki}} \omega_{e,d,ki} = c^{CM}_{e,d,ki} + c^{CSM}_{e,d,ki}, \forall d \in \Omega_{d}, \forall k \in \Omega_{ur},$$

$$0 \leq l^{CM}_{e,d,ki}, \forall d \in \Omega_{d}, \forall k \in \Omega_{ur},$$

$$(\frac{1}{\delta_{e}^{CM}}) \sum_{v \in D_{d_{ki}}} \sum_{v \in \Omega_{d_{ki}}} l^{CSM}_{e,d,ki} \leq \rho^{C} K^{C},$$

$$S^{d}_{e,di} = S^{d}_{e,di}, \forall d \in \Omega_{d}, \forall i \in \Omega_{i}/d = 1 \land t^{n}_{d_{ki}} = -1,$$

$$S^{d}_{e,di} = S^{d}_{e,di}, \forall d \in \Omega_{d}, \forall i \in \Omega_{i}/d > 1 \land t^{n}_{d_{ki}} = -1 \land t^{n}_{d_{ki}} \geq 0,$$

$$S^{d}_{e,di} \geq \delta_{e}^{PE} B_{e}, \forall d \in \Omega_{d}, \forall i \in \Omega_{d}/d = d, N^{d} \land t^{n}_{d_{ki}} = 1,$$

$$0 \leq S^{d}_{e,di} \leq B_{e}, \forall d \in \Omega_{d}, \forall i \in \Omega_{i},$$

$$S^{d}_{e,di} = \sum_{v \in D_{d_{ki}}} \omega_{e,d,kl} (S^{t}_{e,dk} - \delta_{e}^{dP}) l^{CM}_{e,d,ki},$$

$$0 \leq S^{d}_{e,di}, \forall d \in \Omega_{d}, \forall i \in \Omega_{i},$$

$$\varepsilon_{e,di} = 0, \forall d \in \Omega_{d}, \forall i \in \Omega_{i},$$

$$f(d = 1 \land t^{n}_{d_{ki}} = -1) \lor (t^{n}_{d_{ki}} \geq 0 \land t^{n}_{d_{ki}} = 0)$$

$$\varepsilon_{e,di} = \eta^{cCh} \rho^{cCh} f^{ch}_{e,di} \tau^{ch}_{e,di},$$

$$\forall d \in \Omega_{d}, \forall i \in \Omega_{i}/t^{n}_{d_{ki}} \geq 0 \land t^{n}_{d_{ki}} = 1$$

$$\tau^{ch}_{d_{ki}} \leq t^{ch}_{e,di} \leq \tau^{ch}_{d_{ki}}, \forall d \in \Omega_{d}, \forall i \in \Omega_{i}$$

$$\begin{align}
&\forall d \in \Omega_{d}, \forall i \in \Omega_{i}/t^{n}_{d_{ki}} \geq 0 \land t^{n}_{d_{ki}} = 1
&\tau^{ch}_{d_{ki}} \leq t^{ch}_{e,di} \leq \tau^{ch}_{d_{ki}}, \forall d \in \Omega_{d}, \forall i \in \Omega_{i}
\end{align}$$

The objective function (1) represents two parts related to $\varphi_1$ and $\varphi_2$, as well as their respective weighting factors. $\varphi_1$ stands for the total navigation time of each HEV and its minimization ensures that the shortest route is selected considering the traffic information represented by the speed value, $v_{d_{ki}}$, in each road $d_{ki}$ to be selected as part of an operation strategy. On the other hand, $\varphi_2$ is related to the lifetime of the HEV battery, taking into account the minimization of the degradation effect due to frequent recharging. Thus, for the efficient usage of an HEV battery, an optimal level of SoC should be considered. The scheduling of deliveries $d$ for each HEV, are made via (2). In this constraint, the values of $\beta$ (-1, 0, and 1) define the type of intersection $i$ and are used to determine the shortest route $ij$ (related to node $i$) to be traveled. For $\beta = -1$, (2) is used to calculate the shortest distance $l_{ij}$ to be traveled, from intersection $i$ ($t^{n}_{d_{ki}} = -1$) to all possible intersections $j$. If $\beta = 0$, (2) stands for the navigation of HEV on the roads with intermediate intersections, where the trip from intersections $k$ to $i$ and $j$ is part of the minimum route, $l_{ij}$ and $l_{ij}$. In this case, the intermediate intersections $i$ ($t^{n}_{d_{ki}} = 0$) for the arrival intersection of an HEV that is coming from intersections $k$, while at the same time, it plays the role of the departure point for the HEV going to intersections $j$. For $\beta = 1$ the road $ki$ is traveled, starting from all possible intermediate intersections $k$ ($t^{n}_{d_{ki}} = 0$) to the arrival intersection $i$ ($t^{n}_{d_{ki}} = 1$), where, $t^{n}_{d_{ki}}$ represents the shortest road. Constraints (3)-(6) stand for the navigation modes of the HEV considering a percentage of daily fuel consumption, $\rho^{C}$. Constraint (3) shows that the distance for delivery $d$ in each road $d_{ki}$ is equal to the sum of the distances traveled in CDM, $t^{CM}_{e,d_{ki}}$ and, in CSM, $t^{CSM}_{e,d_{ki}}$. The reduction of $t^{CM}_{e,d_{ki}}$ implies a reduction in the maintenance costs of the battery (improving its lifetime), which results in increasing $t^{CSM}_{e,d_{ki}}$, and consequently, more fuel is consumed and higher CO2 is emitted. However, to ensure the sustainable management of the fleet, it is necessary to consider a daily fuel consumption limit that allows the efficient use of the battery taking into account the minimization of the effects of degradation during its lifetime. Constraints (4) and (5) stand for non-negativity conditions. The distance traveled in CSM, $t^{CSM}_{e,d_{ki}}$, considering $\rho^{C}$ is guaranteed in (6). Note that CO2 emissions are implicitly limited when a daily fuel consumption, $\rho^{C} K^{C}$, is considered. Therefore, the energy of HEV battery is used more frequently (obtaining a longer distance traveled in CDM, $t^{CM}_{e,d_{ki}}$), in order to optimize its useful lifetime. The battery charging of each type of HEV is established via (7)-(16). In (7), the initial SoC at intersection $i$ ($t^{n}_{d_{ki}} = -1$) is considered for the first delivery $d$. At intersection $i$, the SoC of HEV $e$ in delivery $d$, ($t^{n}_{d_{ki}} = -1$), is equal to its SoC in delivery $d-1$ ($t^{n}_{d_{ki}} = 1$), (8). The SoC for delivery $d$ at intersection $i$ ($t^{n}_{d_{ki}} \geq 0$) is calculated by (9). To do so, the available energy, $S^{d}_{e,di}$, and the recharging energy by the HEV at the charging station $i$ ($t^{n}_{d_{ki}} = 1$), $\varepsilon_{e,di}$, is considered. For the final SoC at intersection $i$, ($t^{n}_{d_{ki}} = 1$), after returning to the
The trip in CDM on road $d$ is greater than or equal to the total demand, $D_{t,k}^d$, and for the subsequent deliveries with warehouse $(d = \mathcal{N}^d)$, $(10)$ is used, while $(11)$ guarantees the limits of $SO_{e,d,k}^\theta$ at intersection $k$ and the energy used during the trip in CDM on road $ki$ ($\omega_{e,d,k} = \mathcal{I}$), $\eta_{e,d,k}^{\theta,e}$. Constraint $(13)$ stands for the non-negativity condition of $SO_{e,d,k}^\theta$. To avoid charging at the starting intersection $i$ ($t_{i,k}^d = -1$), during the first delivery, and for the subsequent deliveries with intersection $i$ which is equipped with charging station, $\eta_i = 1$. Constraint $(16)$ guarantees that $v_{e,d,,i}$ within the acceptable bounds.

**B. Second-stage: MILP Model**

The proposed approach at this stage is presented by an MILP model, $(17)-(20)$.

$$\begin{align*}
\min & \quad \delta^e \Delta C^{\text{HEV}} + \sum_{\forall s} \sum_{\forall d} \sum_{\forall p} M_{s,d,p}^{\text{fob}} Z_{e,s,p}^{fob} \\
\text{subject to:} & \\
& \sum_{\forall s} \sum_{\forall p} Z_{e,s,p} \leq |\Omega_{d,p}|; \forall e \in \Omega_e \\
& \sum_{\forall s} \sum_{\forall p} Z_{e,s,p} = 1; \forall s \in \Omega_{op} / U_{s}^{op} \leq C_{s}^{\text{HEV}} \\
& \sum_{\forall p} \sum_{\forall s} \sum_{\forall p} C_{e,s,p}^{\text{HEV}} Z_{e,s,p} - \sum_{\forall p} \sum_{\forall s} U_{s}^{op} Z_{e,s,p} \leq \Delta C^{\text{HEV}}
\end{align*}$$

The objective function at this stage $(17)$ is composed of two terms. The first term stands for the costs related to the total quantity of extra goods obtained as a result of the optimal management of the operations of the heterogeneous fleet. The second term represents the values of the objective functions obtained for HEV $e$ in operation $s$ via the possible strategy $v$. In this term, the cost matrix $M_{e,s,p}^{\text{fob}}$ is obtained from the first stage. Constraint $(18)$ guarantees the limit of the number of operations to be performed by a type of HEV technology, while $(19)$ guarantees that only one strategy is possible to be selected in operation $s$ of a type of HEV $e$, so that the capacity, $C_{e,s}^{\text{HEV}}$, is greater than or equal to the total demand, $U_{s}^{op}$. The balance between the total capacity of transporting goods by the HEV heterogeneous fleet and the total demands in operation $s$, $U_{s}^{op}$, is established in $(20)$. This balance is related to the number of extra units of goods, $\Delta C^{\text{HEV}}$, to be minimized in $(17)$.

**C. Linearization**

The global solution of the proposed MINLP model in the first stage cannot be guaranteed via existing commercial solvers, although a well-defined nonlinear model may result in a high-quality optimal solution [46]. Therefore, an appropriate linearization technique, the Big-M method, is applied to recast the nonlinear terms in $(12)$ and $(15)$, [47].

Constraint $(12)$ is replaced with $(21.a)$ and the linearization technique presented in [7] is used in $(21.b)-(21. e)$.

$$\begin{align*}
& \text{SO}_{e,d,k}^{\theta} = \sum_{\forall v} \sum_{\forall s} \sum_{\forall p} M_{s,d,p}^{\text{fob}} \Delta C^{\text{HEV}}, \\
& \forall d \in \Omega_d, \forall k \in \Omega_k \\
& 0 \leq -\Delta_{e,d,k} + S O_{e,d,k}^{\theta} \leq M (1 - \omega_{e,d,k}), \forall d \in \Omega_d, \forall k \in \Omega_k \\
& 0 \leq -D_{e,d,k} + M \omega_{e,d,k}, \forall d \in \Omega_d, \forall k \in \Omega_k \\
& 0 \leq -\Delta_{e,d,k} + C_{e,d,k}, \forall d \in \Omega_d, \forall k \in \Omega_k \\
& 0 \leq \Delta_{e,d,k} \leq M \omega_{e,d,k}, \forall d \in \Omega_d, \forall k \in \Omega_k
\end{align*}$$

To linearize $(15)$, constraints $(22.a)-(22.c)$ are used.

$$\begin{align*}
& e_{v,e,d,i} = \eta_{e,d,i}^{\text{fob}} \Delta C^{\text{fob}}, \\
& v \in \Omega_v, \forall d \in \Omega_d, \forall e \in \Omega_e, \forall d \in \Omega_d, \forall i \in \Omega_i
\end{align*}$$

**D. MILP models**

The obtained MILP models are as follows.

**First Stage:** $\min (1)$ s.t. $(2)-(11)$, $(13)-(14), (16), (21), (22)$.

**Second Stage:** $\min (17)$ s.t. $(18), (19), (20)$.

**IV. PROPOSED METHODOLOGY**

This section provides detailed explanations of the proposed methodology.

**A. First Stage**

At this stage, the optimization problem related to the objective function $(1)$ is solved as a part of the iterative process depicted in Fig. 6 using the hyper-matrix data, $M_{e,s,p,d}^{\text{det}}$, to
obtain the \( M_{e,s,v}^{ob} \) values. Table II shows the structure of this hyper-matrix related to operation 1 with delivery points in the intersections 211, 250, 265, and 276 [41]. For this operation, all possible strategies \( v \) for a given HEV \( e \) are presented. Also, all the operating strategies \( v \) start and end at intersection 214, which is the warehouse. In matrix \( M_{e,s,v}^{ob} \), obtained via the iterative process, each element represents the value of the objective function (1) for each strategy \( v \) of the operation \( s \) to be performed by HEV \( e \). The iterative process is run for each type of HEV technology to be used for operation \( s \) considering all the operating strategies \( v \). The algorithm starts with pre-established values: \( \Omega_{e} \), \( \Omega_{op} \), \( \Omega_{ps} \), \( \Omega_{d} \), \( \Omega_{i} \), and \( M_{e,s,v}^{det} \). The values \( t_{d,i}^{n} \) and \( M_{e,s,v}^{ob} \) are initialized to zero. Table III anonymously presents the information related to the types of HEVs. Real data of 4 different existing technologies are anonymously used.

In addition, another iterative process is executed to each delivery \( d \) and, intersection \( i \). All intersections \( i \) are compared under conditions \( i = M_{e,s,d,v}^{det} \), and \( i = M_{e,s,v,d+1}^{det} \). Depending on the value of intersection \( i \) (which exist in the matrix \( M_{e,s,v,d}^{det} \)), the conditions can be met or not, and consequently, \(-1 \) (stands for departure) and 1 (stands for arrival) are assigned to \( t_{d,i}^{n} \), respectively. Thereafter, the condition \( i = |M_{d,i}^{1}| \) is evaluated for each intersection \( i \). If this condition is not met, then a new iteration for \( i \) is performed, otherwise, condition \( d = |M_{d,i}^{1}| \) is considered for each \( d \); if this condition is not met, then the iteration is performed for the next \( d \). Otherwise, the proposed MILP model is solved and the solution is assigned to \( M_{e,s,v}^{ob} \).

Then, for each operating strategy \( v \), condition \( v = |M_{op}| \) is evaluated. If the condition is not met, then a new iteration for \( v \) is done, otherwise, the condition \( s = |M_{op}| \) is evaluated for each \( s \). If this condition is not met, then the iteration is done for the next operation \( s \). Otherwise, the MILP model is solved for another HEV \( e \) technology considering the condition \( e = |M_{e}| \), and if this condition is not met, the iteration for the next \( e \) is done, otherwise, the process terminates. Up to this point, the best fleet automation strategy without considering goods capacity of HEVs is determined by the summation of the minimum values of the matrix of the objective function related to operating strategy \( v \) for operation \( s \) of HEV \( e \), \( M_{e,s,v}^{ob} \). Note that this minimum value is strongly tied to each operating strategy \( v \) to be made by HEV \( e \), which presents the minimal navigation time as well as the most economical battery usage.

To ensure that the heterogeneous fleet automation strategy is not only sustainable but also operationally efficient in terms of the number of goods to be transported (see Figs. 1 and 2), a second stage that optimizes the vehicles transport capabilities is implemented based on information from the matrix \( M_{e,s,v}^{ob} \).

**B. Second Stage**

In the MILP model with objective function (17), \( C_{e}^{HEV} \) and \( Z_{e,s,v} \) are decision-making variables at this stage. In this objective function, the \( M_{e,s,v}^{ob} \) values calculated in the previous stage serve as the coefficients related to the main variable \( Z_{e,s,v} \). Fig. 7 provides an illustrative example of selecting the best operational strategy among all for each operation \( s \) via variable \( Z_{e,s,v} \). If operation \( s \) equals 1 (\( Z_{2,1,1} = 1 \)), operating strategy 11 and HEV with technology type 2 are selected, while, for operations 2 (\( Z_{2,2,3} = 1 \)) and 3 (\( Z_{2,3,2,4} = 1 \)), the HEV types 1 and 2 under operating strategies 3 and 24 are selected, respectively. An interesting observation is that for two different operations, e.g., 1 and 3, the same type of vehicular technology can be used as far as the capacity of this vehicle meets the requirements of each operation \( s \). Note also that, at this stage, the \( C_{e}^{HEV} Z_{e,s,v} \) and \( U_{e}^{op} Z_{e,s,v} \) terms play a key role in efficiently managing the HEVs capability in goods delivery, that is, reducing the values of \( C_{e}^{HEV} \) for the heterogeneous fleet so that the maximum capacity to be used while not overloading the HEVs. This way variable \( Z_{e,s,v} \) allows us to select the best type and strategy to carry out a given operation guaranteeing the optimal management of the heterogeneous fleet of HEVs.

**V. RESULTS AND DISCUSSION**

In order to evaluate the proposed two-stage model, the urban area presented in Fig. 3 is used for tests. Twelve operations (\( |M_{op}| = 12 \)) are considered in which four different delivery points should be visited for each operation [41]. Each operation \( s \) presents 24 operating strategies (\( |M_{op}| = 24 \)) representing the possible sequences in which an HEV can perform the
is 10 years, the capacity fade at the end of life, $C^e$, and the battery cost, $C^b$, for each HEV are 0.2 and $300/kWh$, respectively [21]. In the second stage, the values of $U_1^d$, and $C_{HEV}$ are shown in Table IV. The programming language AMPL is used for the implementation purpose, while the global optimal is obtained via the commercial solver CPLEX on a PC with 2.67-GHz CPU, and 3 GB of RAM. Table IV shows the type of HEV technology, the best operating strategy selected for each operation and the fuel consumption for two cases: with and without CDM/CSM. The term without CDM/CSM refers to the condition in which HEV $e$ only navigates in CSM (charge-sustaining mode), i.e., the HEV is propelled by the energy produced by the fuel consumption, while the term with CDM/CSM stands for the conditions in which the HEV can select between CSM and CDM (charge depleting mode), i.e., the HEV is propelled by the energy produced by either the fuel consumption or the energy stored in the battery. Each operation is supplied by a type of HEV with $C_{e}^{HEV} \geq U_1^d$, ensuring that each HEV satisfies the capacity limit in transporting the goods. Thus, the total extra goods units, $\Delta e^{HEV}$, in each HEV related to operations 2, 4, 6, 7, 8, 9, 10 and 11, resulting in 20 units. For example, in scenario 1, the capacity of HEV type 1 is 15 and it is carrying 15 goods, while in scenario 6, the capacity of HEV type 2 is 20 and it is carrying only 16 goods, resulting in 4 extra vacant lots. The total costs regarding fuel consumption for both cases are $24.20$ and $62.49$, which show savings of 61.27% per day. It is worth mentioning that, for each operation, the values of with CDM/CSM and without CDM/CSM have been calculated considering the same shortest route related to the best operational strategy. In order to know the characteristics of the driving routes of the operations carried out by the heterogeneous fleet, the sequence of urban roads $k_i$ traversed by each HEV during operation is shown in Fig. 8. In this figure, each subfigure contains the operation number (in the right-side of vertical direction), number of traversed urban roads during the operation (in horizontal direction), and the traveled distances (in the left-side of vertical direction). As can be seen, all the vehicles have traversed below 60 urban roads while,
among all, the largest and smallest number of traversed urban roads belong to operation 9, with 56 traversed roads, and operation 1, with 21 traversed roads, respectively. In this figure, the longest urban road (7.2 km) is traversed by the HEV of type 1 during operation 1, see Fig. 8 (a). From Fig. 8 (d), it can be seen that in operations 10 and 11, the total number of traversed urban roads is similar, 49 for each. To see the difference between these two cases, Table V is presented. Features such as the total distance, longest urban road, and the total number of urban roads traversed within the best operational strategies, presented in Table IV, are detailed in Table V. In this table, the percentages are obtained with respect to the largest traveled distance that belongs to operation 9. From this table, it can be concluded that the traveled distance in operation 10, is 77.44 km, which is a bit lower than the distance traveled in operation 10, with 88.48 km. Moreover, it can be seen that the total distances related to operations 4 and 8 are similar, 64.64 km. However, the number of urban roads traversed in operation 4 is more than the one in operation 8, see Table V. Fig. 9 is used to illustrate the number of urban roads traversed by the HEV to do the deliveries while visiting the charging points, if necessary.

In addition, the shape of these types of routes can be used to explain the strong influence of traffic density as well as the driving direction (one-way or two-way) during navigation. For example, in operation 8, HEV departs from the warehouse driving direction (one-way or two-way) during navigation. For operations with deliveries located far away from the warehouse location, the best decision of the fleet operator should consider the use of HEVs with higher battery capacities and autonomy. Fig. 10 (b) shows the routes to be traveled by the HEVs of type 3 and 2 related to operations 5 (red line) and 12 (blue line), respectively. Note that the HEV of type 2 visits more charging points (169 and 194, both with charging times of 0.5 h), compared to the HEV of type 3 (278 with 0.5 h). It is worth mentioning that the recharge done by the HEV of type 3 occurs during the return to the warehouse. Also, observation (90.1 km), with the highest number of km, is performed by the HEV of type 1 (8.8 kWh) with battery recharges at charging points (116 and 191) with a shorter distance than the other cases, i.e., the distance between 116 and 191 is longer than the distance between 278 and 310. This fact shows that, for operations with deliveries located far away from the warehouse, the best decision of the fleet operator should consider the use of HEVs with higher battery capacities and autonomy.

Fig. 11 (a), the shortest routes related to the operations 3 (red line) and 9 (blue line) are shown. Note that for both routes, the HEVs of type 4 and 9 recharge their batteries at the charging points 278 and 310, and 116 and 191, with charging times of 0.5 h and 0.43 h, and 0.47 h and 0.50 h, respectively. This fact shows that, for operations with deliveries located far away from the warehouse location, the best decision of the fleet operator should consider the use of HEVs with higher battery capacities and autonomy.

Fig. 11 (b) shows the routes to be traveled by the HEVs of type 3 and 2 related to operations 5 (red line) and 12 (blue line), respectively. Note that the HEV of type 2 visits more charging points (169 and 194, both with charging times of 0.5 h), compared to the HEV of type 3 (278 with 0.5 h). It is worth mentioning that the recharge done by the HEV of type 3 occurs during the return to the warehouse. Also, operation 9 (90.1 km), with the highest number of km, is performed by the HEV of type 1 (8.8 kWh) with battery recharges at charging points (116 and 191) with a longer distance than the other cases, i.e., the distance between 116 and 191 is longer than the distance between 278 and 310. In this case, for the HEV with lower energy storage capacity, the strategy chooses to charge the battery at a lower number of charging points with a longer distance and not to charge at more charging points with shorter distances. These representative cases reveal the impact of optimal management of HEVs for a given daily operation and emphasize the importance of implementing heterogeneous fleets with different operational characteristics within the service sector. Figs. 11 (a)-(d) show the CDM/CSM of the HEVs related to the representative cases by setting $p^2$ to 30%. The black dots represent the distances of each road $ki$ traveled by HEVs during the navigation on the shortest route without considering the CDM/CSM, $l_{se,d,ki}$. While the
distances traveled in CSM ($E_{d,k,C}^{CSM}$) and CDM ($E_{d,k,CDM}^{DM}$) are presented by the red-dashed and green lines, respectively, for the case with CDM/CSM. The values in which the black dots and green lines meet each other indicate that the HEV has navigated in CDM, i.e., with an efficient use of the battery energy. Otherwise, the HEV has navigated some distance in CSM and the remaining distance in CDM. Note that from the beginning of each operation, most of the roads are traveled in CDM and the remaining distances are traveled in CSM; then fully charged batteries are available for the next operation, as shown in Fig. 12. Figs. 12 (a)-(d) show the SoC profiles of the HEVs for different operations considering the efficient battery charging.

The decreasing bars represent SoC values when the vehicle has used the battery power in CDM from the beginning of the operation. The bars with constant values indicate the fuel consumption by the HEV in CSM, after an efficient use of the battery. The bar changes from one constant level to another, which indicates that the HEV battery is charging at these points. In Figs. 12 (a), (b) and (d), there are two jumps for each operation. For operation 3, the jumps are from 7.65 kWh to 11.34 kWh and from 11.34 kWh to 15.84 kWh; for operation 9, from 0 kWh to 4.21 kWh and from 4.21 kWh to 8.71 kWh; and for operation 12, from 8.82 kWh to 13.32 kWh and from 13.32 kWh to 17.82 kWh. Fig. 12 (c) shows a jump for operation 5, from a level of 2.13 kWh to 6.63 kWh. These facts demonstrate the applicability of HEV technology in the service sector ensuring the sustainable operation of the heterogeneous fleet. Fig. 13 shows the reduction of CO$_2$ emission levels obtained as a selection of the best strategies related to each operation presented in Table IV. The CO$_2$ emission level values for the operation of HEVs with and without CDM/CSM are shown with green and red lines, respectively. The total contribution of the reduction of CO$_2$ emissions by the HEV fleet reaches a value of 55.7% with respect to the total emissions obtained without CDM/CSM, which is a considerable reduction. Note that operation 5, where a shorter distance is traveled in CDM, presents a higher emission reduction due to the high value of $E_{e}^{CO_2}$ related to the HEV of type 3 (see Table III). The positive impact of the optimal management of the HEVs in urban areas is evidenced as a consequence of the significant reduction of polluting emissions.

VI. CONCLUSIONS

In this paper, a two-stage methodology has been proposed for the efficient automation of an HEV heterogeneous fleet. In the first stage, the deliveries scheduling, CDM/CSM driving mode strategies, and SoC of the HEV battery for a given percentage of CO$_2$ emission reduction has been considered. However, finding the optimal operating strategy among all the possible operating strategies, the HEV to be assigned for each operation, while considering its capacity, has been handled in the second stage. The MILP models associated with the two stages of the proposed framework are subject to a set of operational and environmental constraints while considering deliveries schedules, speed variation, battery, and fuel capacities, distances traveled in CDM and CSM, charging and discharging rates, emission reduction levels, and the goods units to be delivered by various HEV technologies. The speed variation is presented by the probability values associated with the LOS. An urban area that contains 412 intersections and 832 roads has been used for the optimal management of the HEV heterogeneous fleet aimed at obtaining the minimum operational cost. Results show that the proposed methodology is advantageous in analyzing and enhancing the operational performances in navigation systems of HEV fleet with different technologies by allowing companies in the service sector to address economic and sustainable criteria by encouraging the use of clean alternative sources instead of relying on fossil fuels.

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Mahdi Pourakbari-Kasaei (S’10–M’15) received his Ph.D. degree in electrical engineering, power systems, from the Universidad Estadual Paulista (UNESP), Ilha Solteira, Brazil in 2015. He was a postdoctoral fellow at UNESP and also a visiting researcher at Universidad de Castilla-La Mancha, Spain, for about 15 months. He was a project executive of three practical projects, PI of three academic projects, and also a consultant in an electric power distribution company. Currently, he is a researcher with the Department of Electrical Engineering and Automation, Aalto University, Finland. He is also the Chairman of IEEE PES, IES Finland IE13/PE31/A34/PEL35 Joint Chapter. His research interests include power systems planning, operations, economics, and environmental issues.

Matti Lehtonen was with VTT Energy, Espoo, Finland from 1987 to 2003, and since 1999 has been a professor at the Helsinki University of Technology, nowadays Aalto University, where he is head of Power Systems and High Voltage Engineering. Matti Lehtonen received both his Master’s and Licentiate degrees in Electrical Engineering from Helsinki University of Technology, in 1984 and 1989 respectively, and the Doctor of Technology degree from Tampere University of Technology in 1992. The main activities of Dr. Lehtonen include power system planning and asset management, power system protection including earth fault problems, harmonic related issues and applications of information technology in distribution systems.

Javier Contreras (SM’05–F’15) received the B.S. degree in electrical engineering from the University of Zaragoza, Zaragoza, Spain, in 1989, the M.Sc. degree from the University of Southern California, Los Angeles, CA, USA, in 1992, and the Ph.D. degree from the University of California, Berkeley, CA, USA, in 1997. He is a Professor at the Universidad de Castilla-La Mancha, Ciudad Real, Spain. His research interests include power systems planning, operation, and economics, as well as electricity markets.