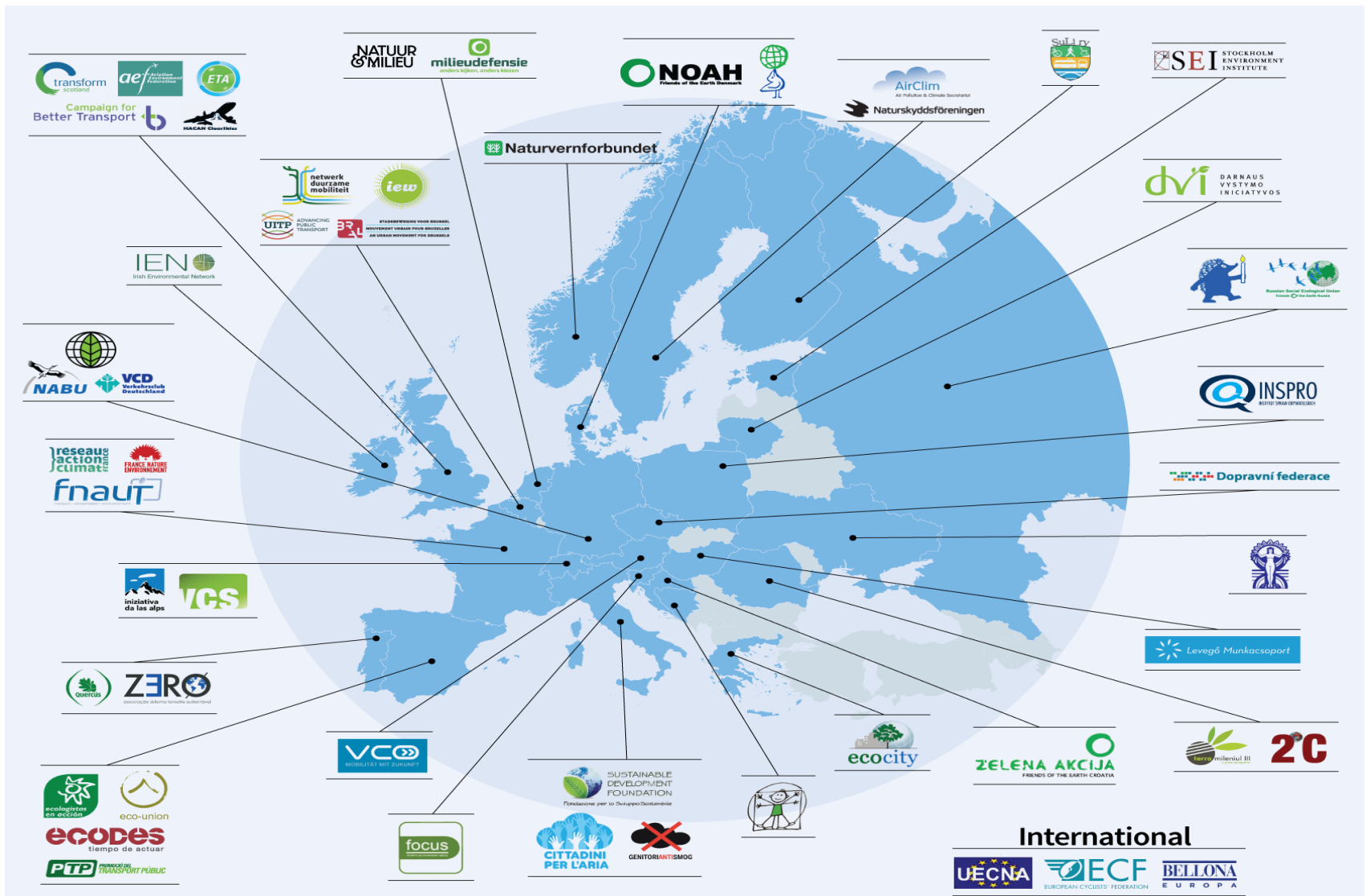


# **HOW EU POLICY CAN INCENTIVIZE E-MOBILITY**

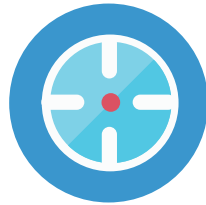
**JUNE 2018**

**DR. JULIA HILDERMEIER**  
**[JH@TRANSPORTENVIRONMENT.ORG](mailto:JH@TRANSPORTENVIRONMENT.ORG)**

# T&E: 58 MEMBERS & SUPPORTERS IN EUROPE



# OUR MISSION



## OUR MISSION

Transport policy should minimise harmful impacts on the **environment** and **health**, maximise **efficiency** of **resources**, including energy and land, and guarantee safety and sufficient access for all.



## OUR ASSETS

**Credibility** is our key asset. Therefore we are a **non-profit** and **politically independent**, and we are strong believers in the power of **science** and **evidence** in policymaking.

# OUR FOCUS

## MOST MODES



## WELL TO WHEEL



## ALL TRANSPORT ENERGY





# COOPERATION

PLATFORM  
FOR  
**electromobility**

## TESTING

PSA PEUGEOT CITROËN



PEUGEOT CITROËN

## CARS



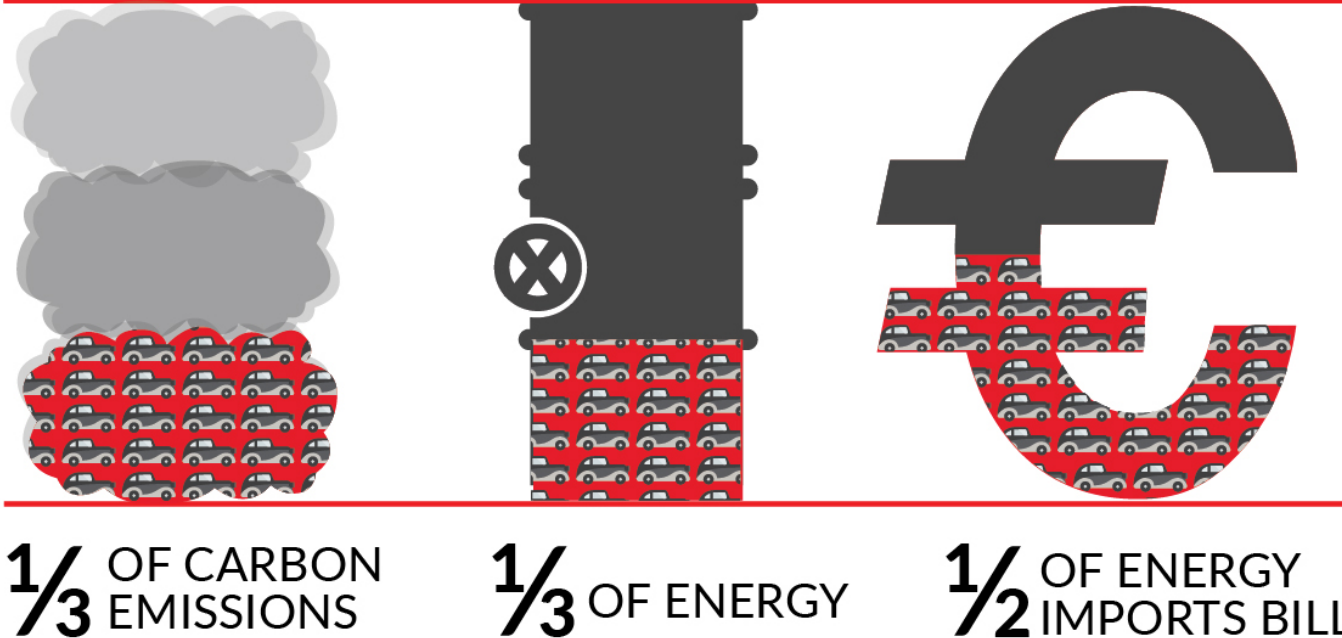
Continental



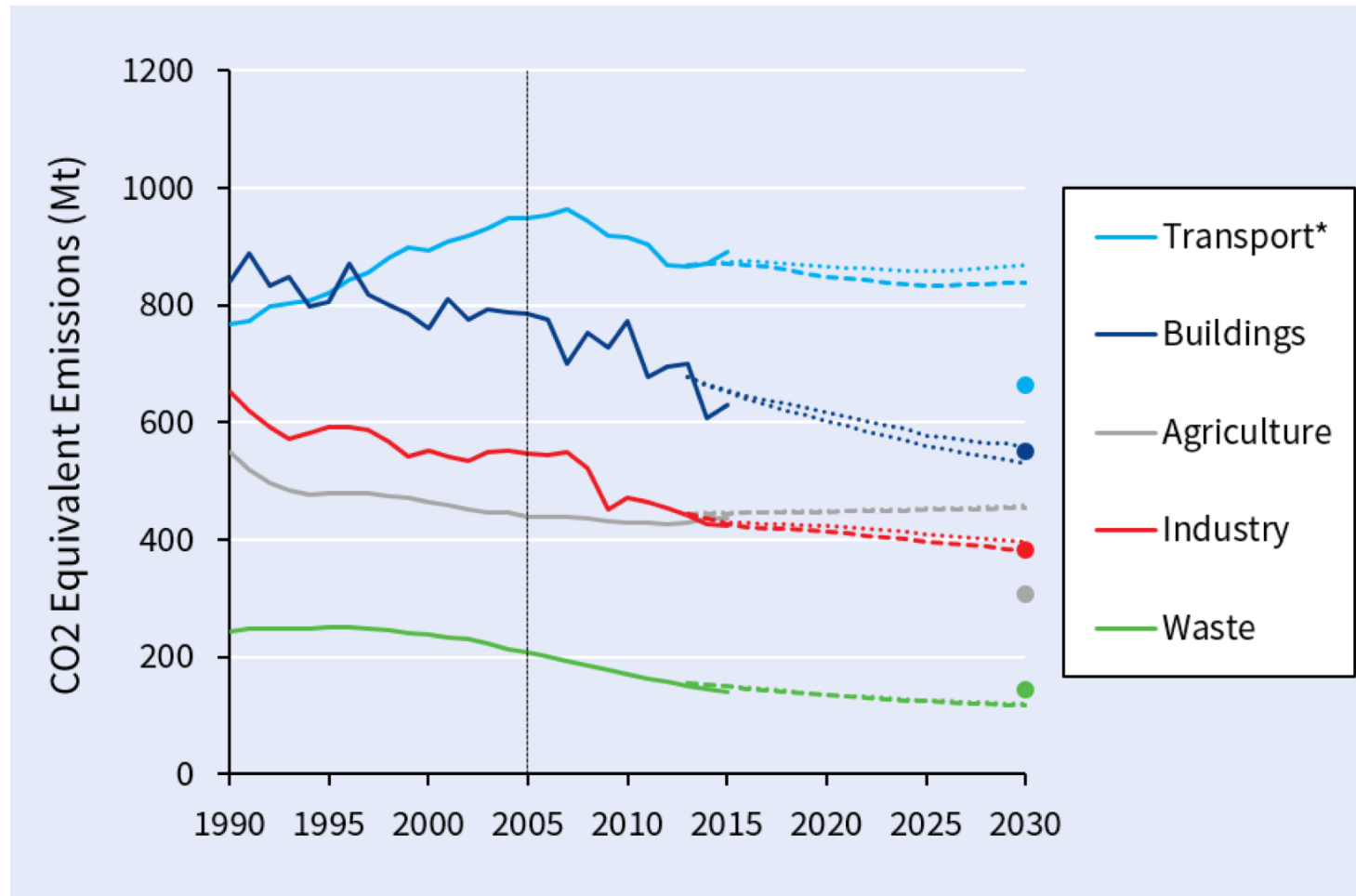
MICHELIN

# REDUCE OIL DEPENDENCE

## Transport in Europe















# TRANSPORT EUROPE'S BIGGEST CLIMATE PROBLEM



# OUR VISION

## Personal mobility must be transformed in many ways

	Car dominated	Large & heavy	Engine powered by oil	Largely owned	Taxes on fuel	Driven & dumb
2015						
	Co-modal	Rightsized -smaller & lighter	Electric motors	Mainly accessed	Charges on use	Connected & driveless
2040						

# 2018 YEAR OF DECISIONS



# EXAMPLE: 2<sup>ND</sup> MOBILITY PACKAGE

Post 2020 CO2 standards for cars and vans

Clean Vehicles Directive

Alternative fuel infrastructure plan

Batteries initiative



# TIMELINE

Winter / Spring 2018

Discussions in Member States & European Parliament



Summer 2018

EP: Vote in Parliament Committees (September)  
Council: Ministers Debate (June)



Autumn 2018

EP: Vote in Plenary  
Finalisation of Council position



Winter 2019

Trilogues



February 2019

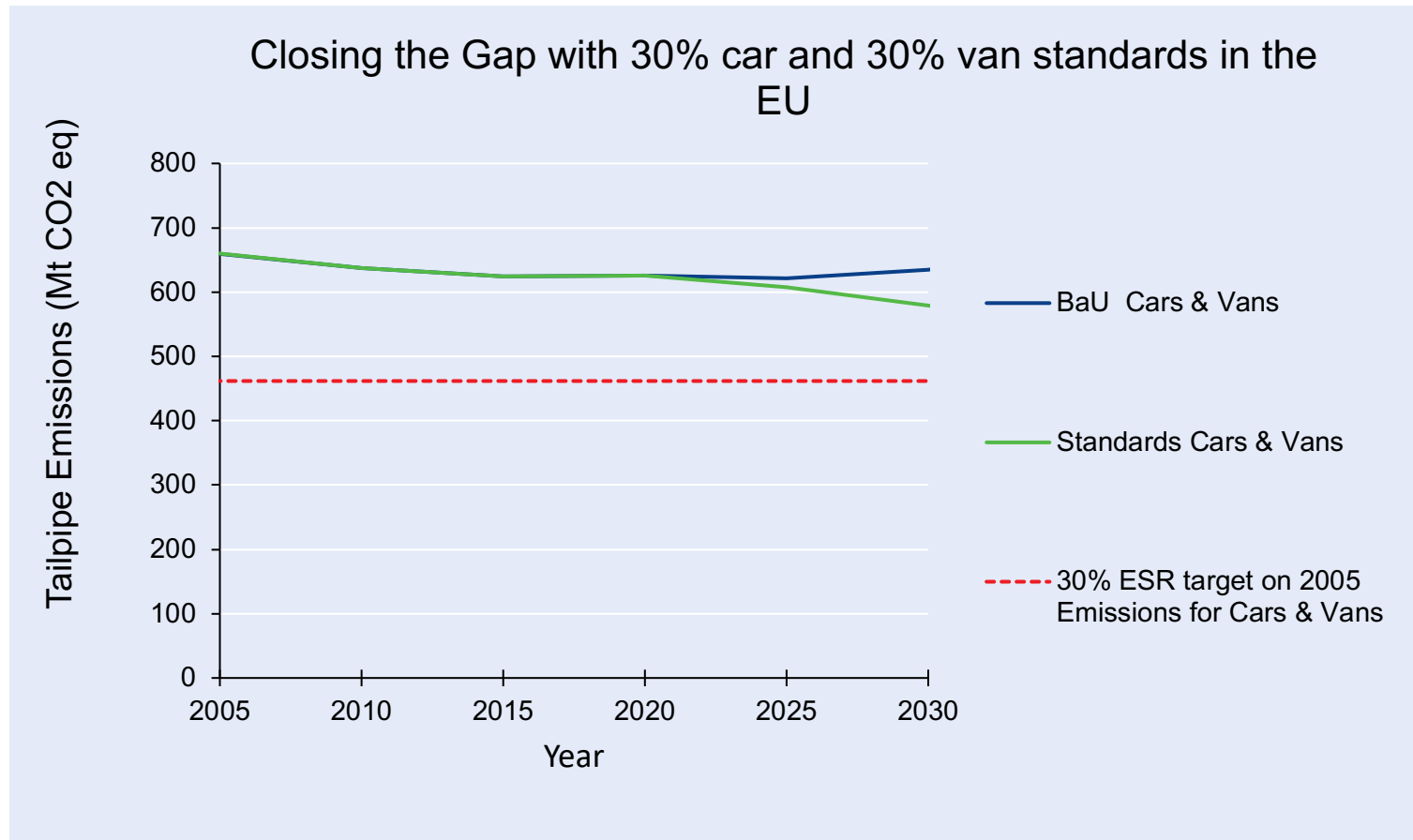
Final Approval



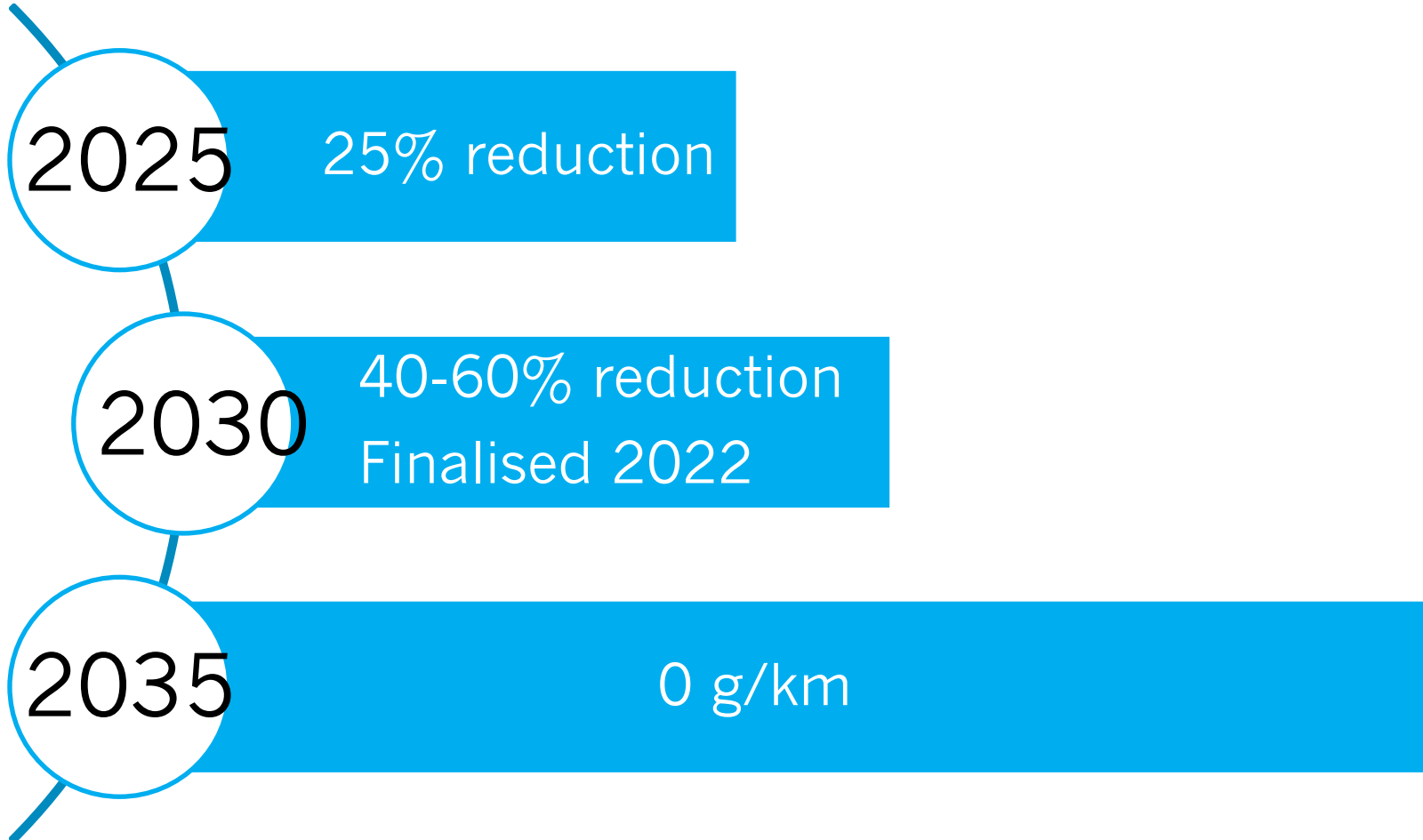
# OUR MAIN ASKS



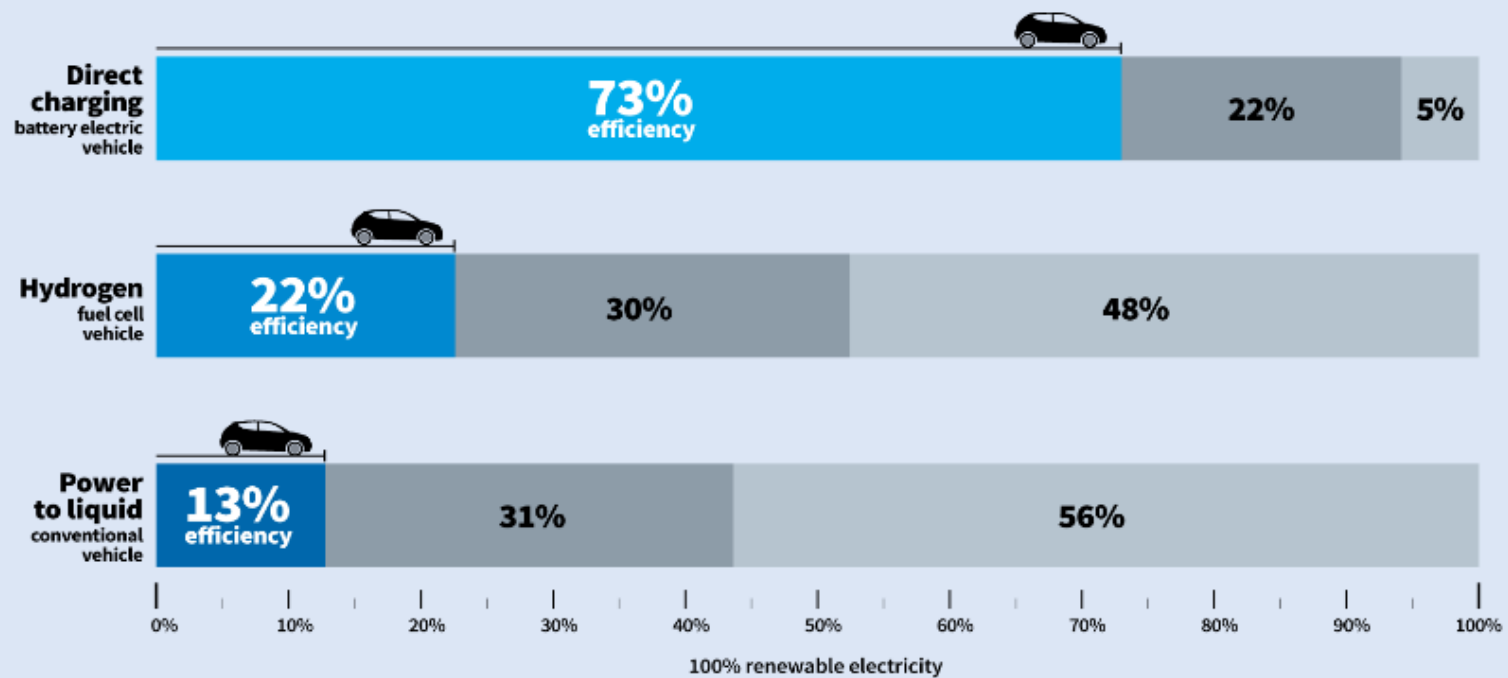
# HIGHER CO2 STANDARDS HELP ALL EUH COUNTRIES TO REACH NATIONAL & EU CLIMATE TARGETS



# T&E ASK: FIRM TARGETS FOR 2025 & 2035 INDICATIVE RANGE FOR 2030



# Cars: Battery electric most efficient by far



Tank to wheel energy losses      Well to tank energy losses

**PUT EUROPE ON  
THE PATH TO**

**EMOBILITY**

# ELECTROMOBILITY COULD CREATE OVER 200,000 NET ADDITIONAL JOBS BY 2030 IN EUROPE

- €49 billion of avoided spending on oil in 2030
- Employment stable in automotive until 2030
- 88% CO<sub>2</sub> cuts by 2050 achievable
- Air pollution cuts (PM from 28,000 t pa to 750 tonnes in 2050, NO<sub>x</sub> from 1.3 mio t in 2018 to around 70,000 tonnes in 2050)
- With smart charging, no significant impacts on grids
- Batteries: bigger benefits with cells produced in Europe, smaller benefits with imported cells

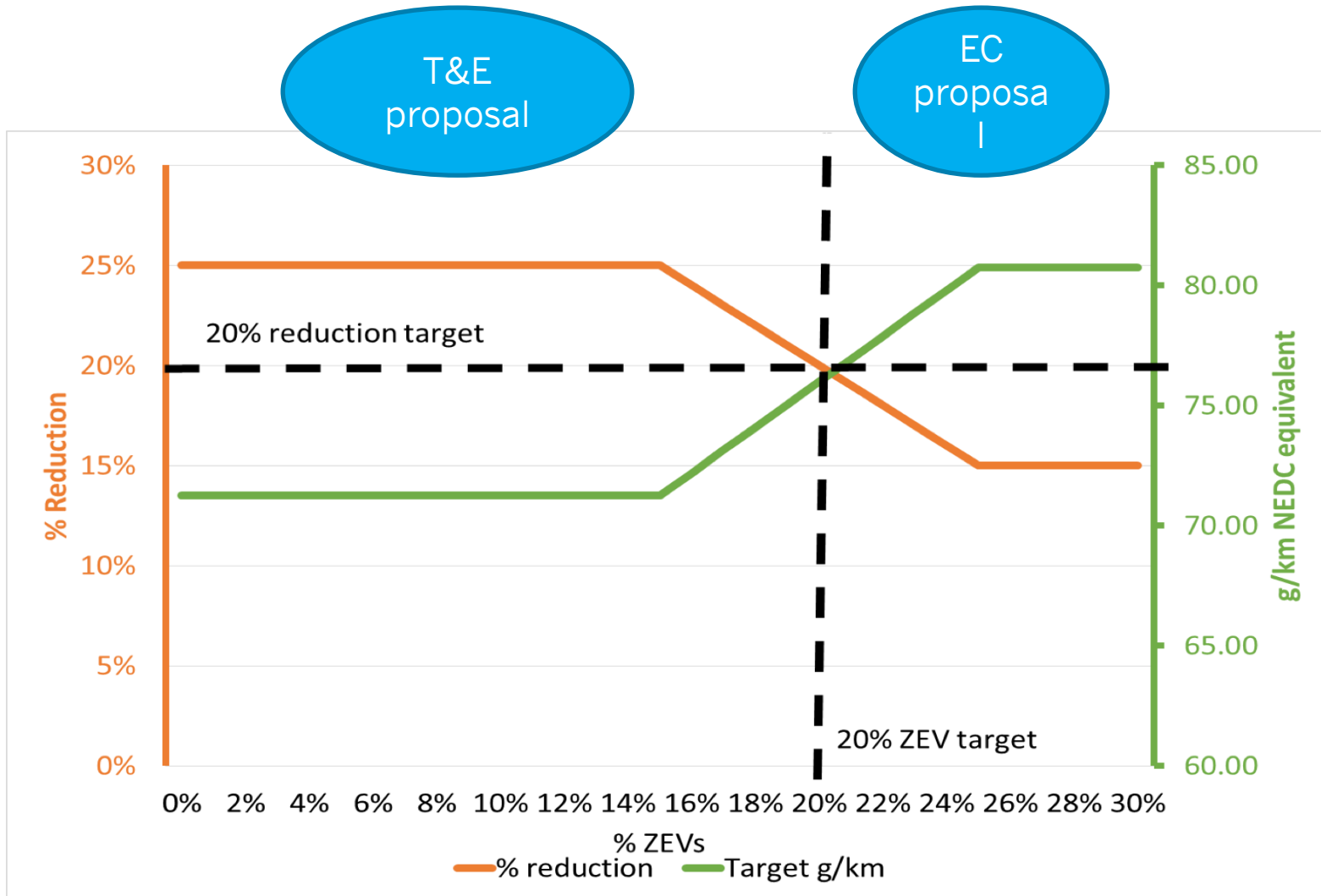


# EU CAR MAKERS NEED SALES TARGETS FOR ZERO EMISSION VEHICLES

A ZEV sales mandate or “Bonus/Malus system”

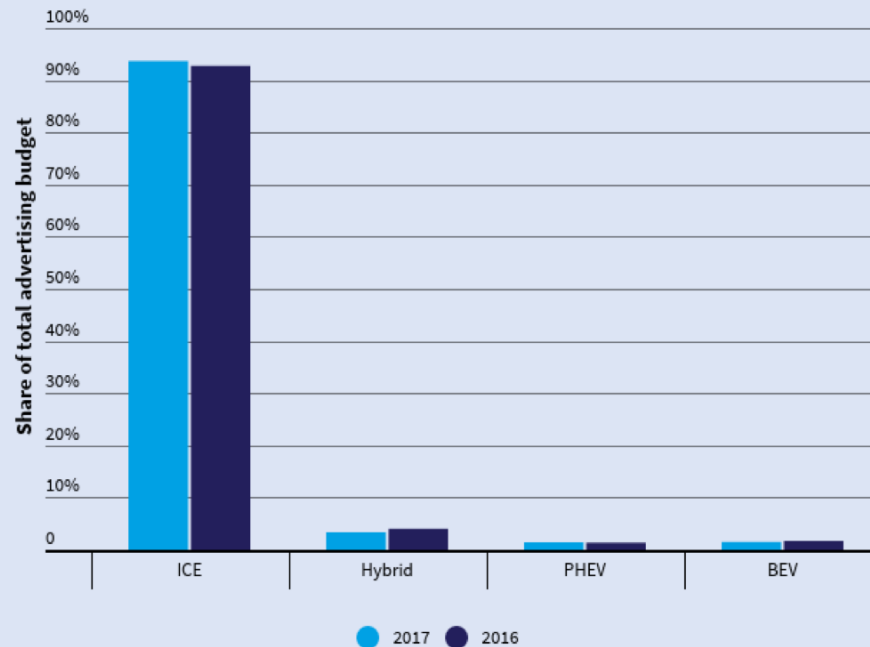
- 2025 target 20% ZEV sales
- 2030 range 40-60% ZEV to be reviewed post 2020
- 2035 goal 100% ZEV sales

# HOW WOULD TWO-WAY ADJUSTMENT WORK?



# LACK OF SUPPLY RESTRICTS DEMAND FOR EVS

Across EU markets, carmakers were mainly advertising ICE vehicles in 2016/17



Based on the five largest EU car markets: France, Germany, Italy, Spain, the UK

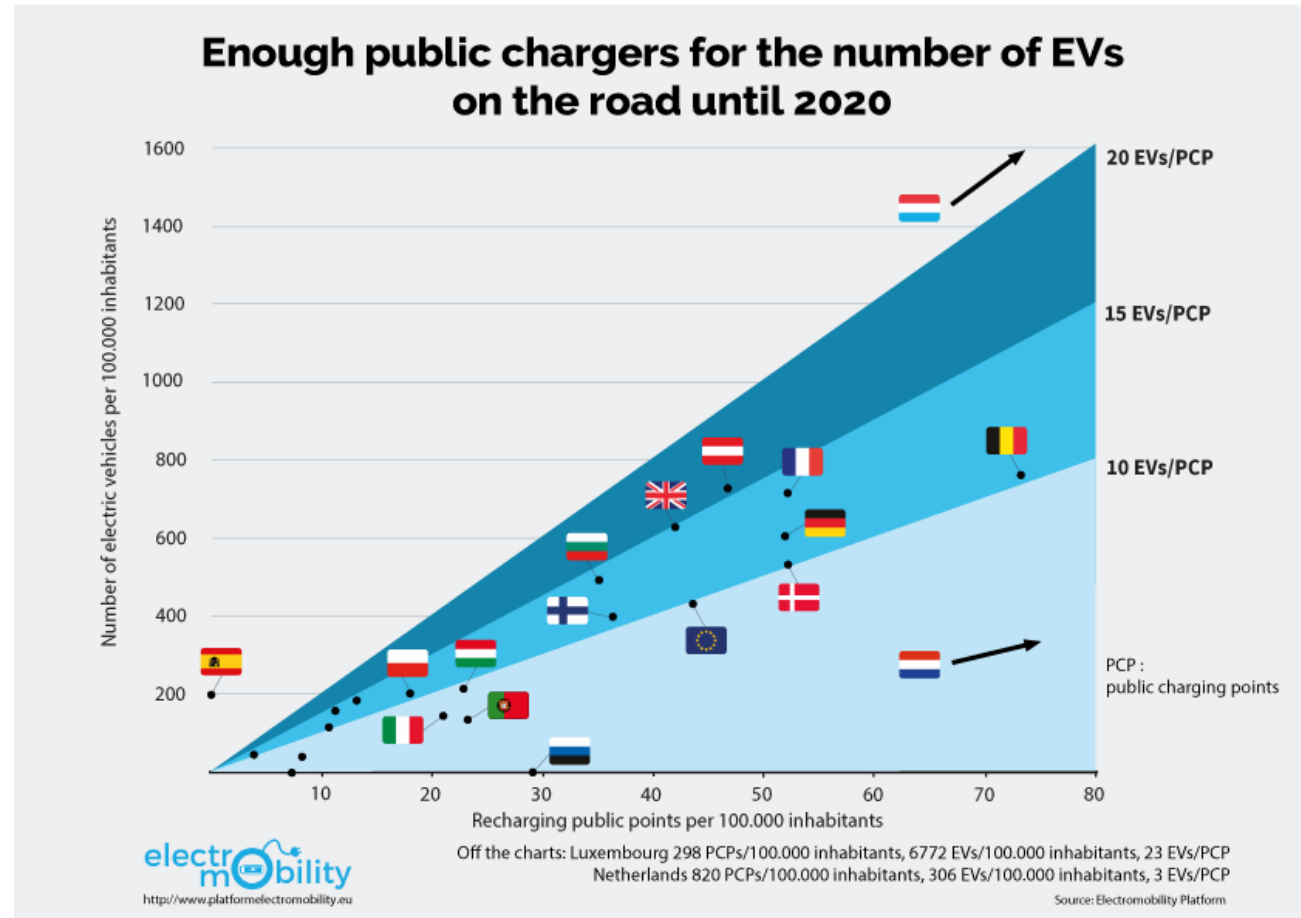
Source: Transport & Environment based on Ebiquity data

Note: Mild hybrids are considered as ICE vehicles



# IF MS ROLL OUT THEIR PLANS, THERE WILL NOT BE INFRASTRUCTURE SHORTAGE

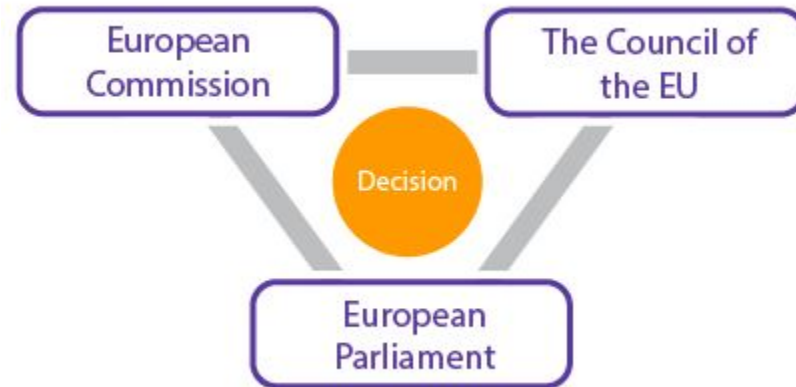
- Today: 6 EVs per Charging Point
- 2.1 million EVs (increase 6-fold vs. 2017)
- 208,000 public recharging points (double)
- 10 EVs per public charging infrastructure





# EU POLICY

# EU POWER “BALANCE”

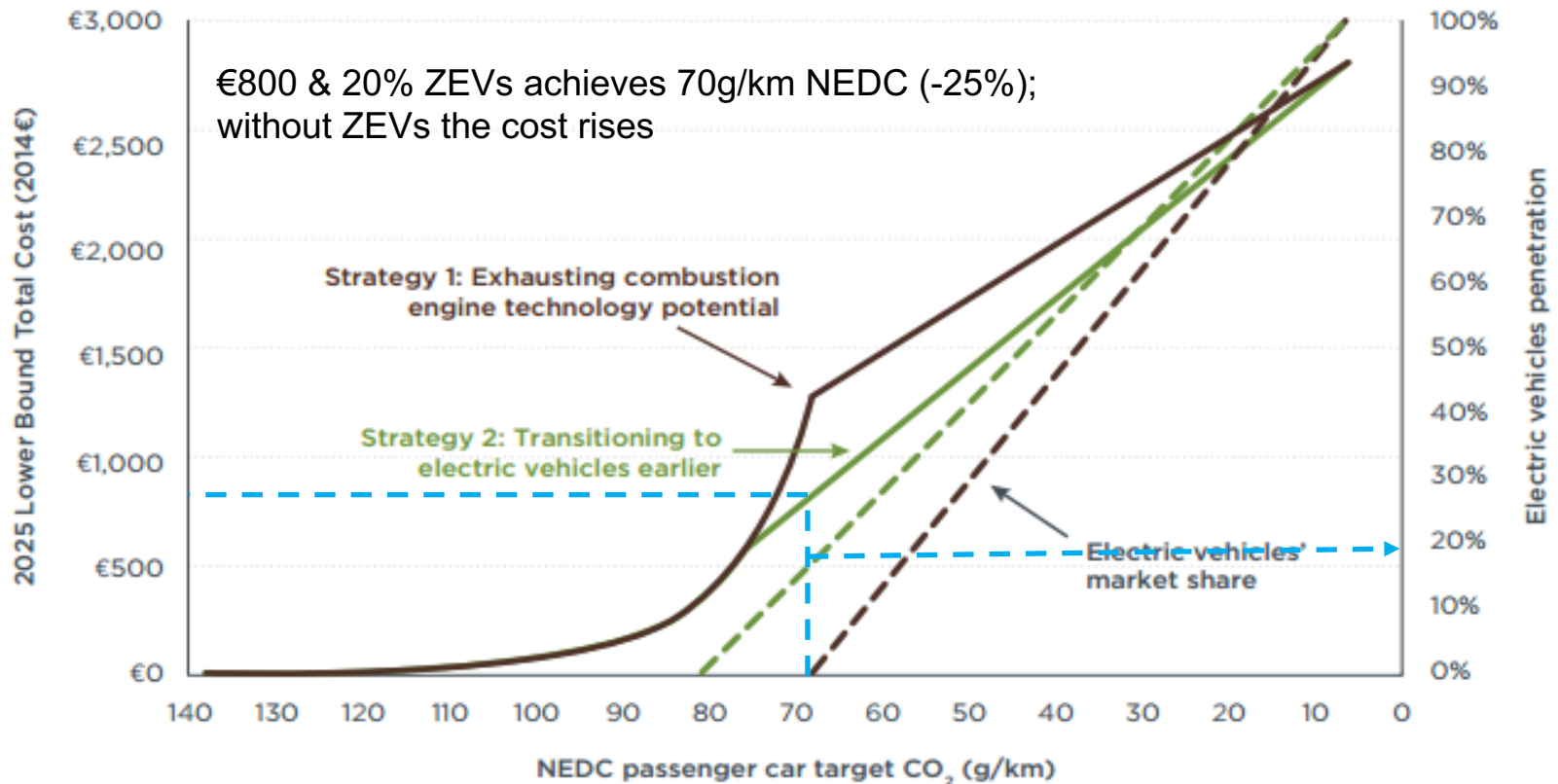


- More ‘top-down’ decisions
- Some Member States influence more than others
- Some industries, too
- Who really decides ? Who should decide ?



# MORE INFO

# A 2025 TARGET OF - 20% IS AFFORDABLE & WILL DRIVE THE MARKET FOR ZEVs



Total incremental cost (including indirect costs but excluding taxes) of reducing CO<sub>2</sub> emissions of the average passenger car in the EU by 2025 in a lower-bound scenario, comparing full deployment of combustion engine technologies before transitioning to electric vehicles to a least-cost strategy of transitioning to electric vehicles earlier.

# FUEL ECONOMY METERS CAN BE USED TO FIX (OR EVEN CLOSE) THE GAP BETWEEN WLTP AND REAL WORLD

## Test and Real World Emissions Projections

