



CLEAN MOBILITY PACKAGE

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2017 CEF T Blending call
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A strong, high-performing industry for the future of Europe's economy

- The **new Industrial Policy Strategy** we are presenting today will help our industries **stay, or become, the number one in innovation, digitisation and decarbonisation**
- **I want Europe to be the leader when it comes to the fight against climate change.**

President Juncker, 2017 State of the Union address
13 September 2017

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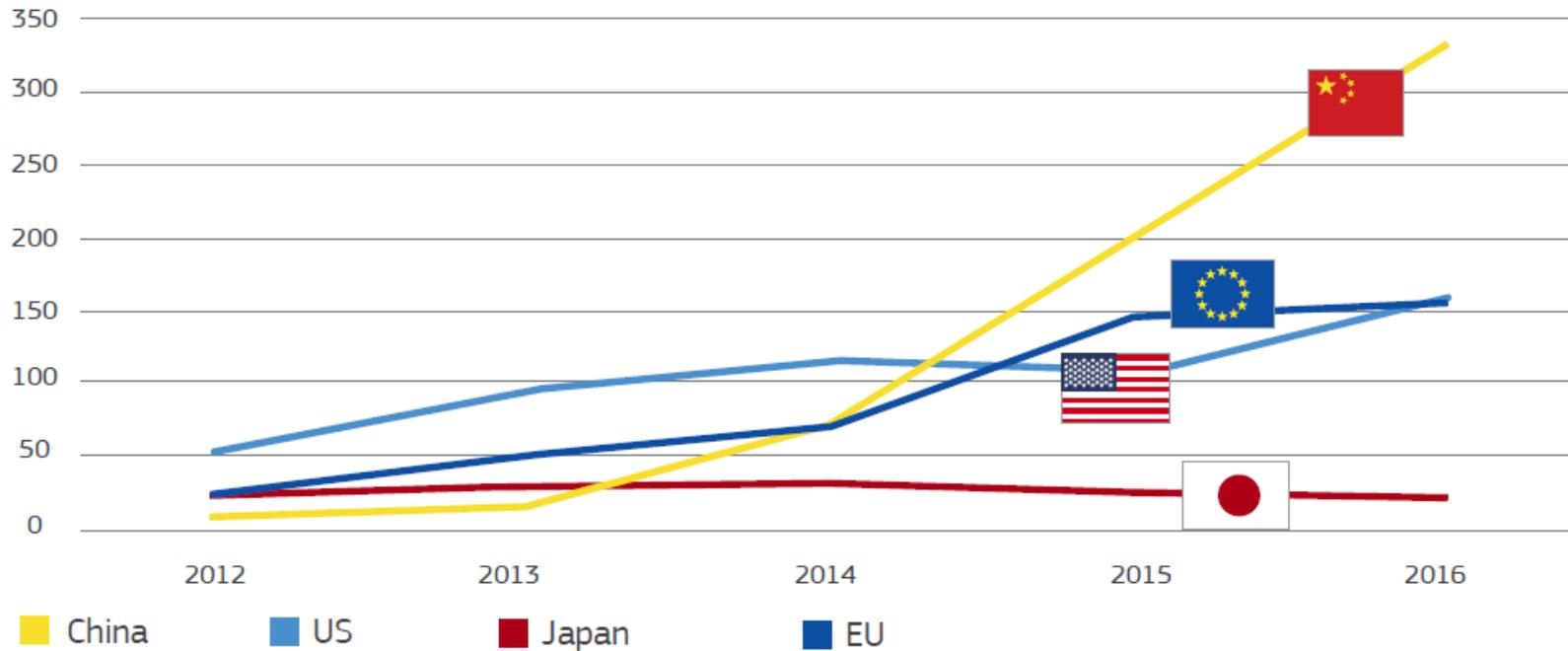
#SOTEU





EU needs to remain competitive and leading

Number (in thousands) of newly registered clean vehicles (zero- and low-emission cars) 2012-2016 in key regions



Need to step up action



There are not enough low- and zero-emission vehicles on Europe's roads

- Level of infrastructure deployment varies considerably between Member States
- Only two Member States provide e.g. more than 100 recharging points for electric vehicles per 100.000 city inhabitants
- Access to and use of infrastructure is often not hassle-free and easy, particularly across borders





Increased level of ambition on vehicles

Exemplary manufacturer announcements

Volkswagen	2-3 million annual electric car sales by 2025; 20-25% of VW Group's global sales to be battery electric vehicles" by 2025
BMW	0.1 million electric car sales in 2017 and 15-25% of the BMW group's sales by 2025
Daimler	0.1 million annual electric car sales by 2020; 15-25% of total sales (Mercedes and Smart) with electric powertrain by 2025
Renault-Nissan	1.5 million cumulative sales of electric cars by 2020; more than 20% of sales to be equipped with electric powertrain by 2022
Chinese manufacturers	4.52 million annual electric car sales by 2020 equivalent to around 20% of total expected production and sales in China.
Honda	66% of the 2030 sales to be electrified vehicles (including hybrids, PHEVs, BEVs and FCEVs)
Volvo	1 million cumulative electric car sales by 2025 - all new models will have an electric motor, including fully electric cars, plug-in hybrids and mild hybrids from 2019

EU needs an infrastructure for alternative fuels that

- fully covers the Trans-European Networks-transport (TEN-T) corridors' core network by 2025 as a key infrastructure backbone in the EU;
- sufficiently covers the whole transportation network for use by all vehicles and vessels;
- enables consumers to recharge or refuel their vehicles as easily as a conventional vehicle;
- ensures inter-operability of infrastructures and services across borders;
- handles increased user demand through smart grid management and storage technologies.





Investment needs are large, but not insurmountable

Taken together, the **total estimated investment** needs for publicly-accessible alternative fuels infrastructure in the EU that can cater to the needs of an increased fleet amount to

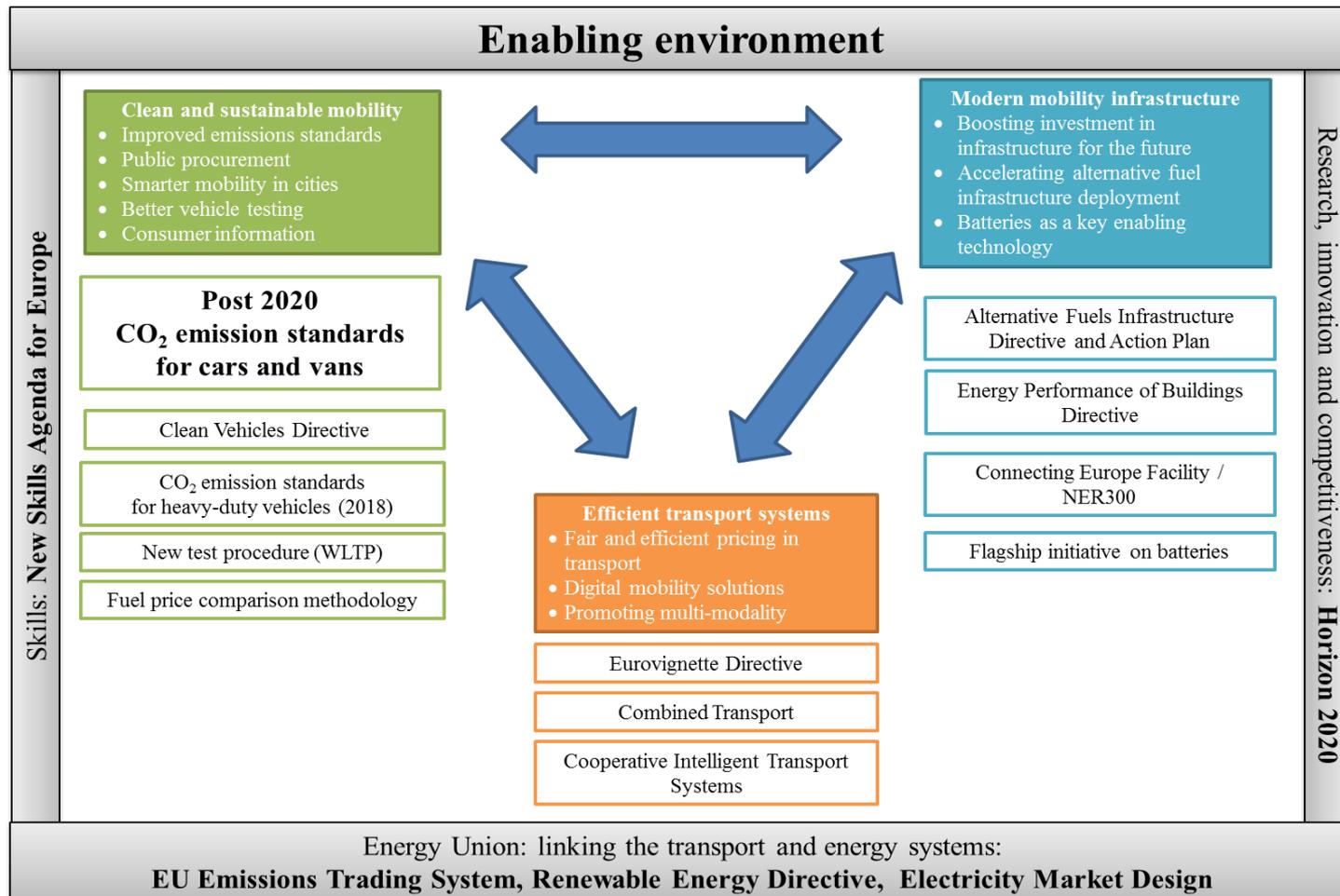
- about **EUR 5.2 billion by 2020**
- additional **EUR 16 billion to EUR 22 billion by 2025**

With investment on all fuels, the bulk of the investment is estimated to fall on electric vehicles (i.e. ~ 1.5 percent vehicle stock in 2020 and ~ 7 percent in 2025 require around 5 times more publicly accessible recharging points).

- Public financial support should trigger private investment, including through innovative financing



2017 Mobility Package: an integrated approach





Better alignment of planning, accelerated implementation and joining up of action

Action Plan on Alternative Fuels Infrastructure (COM (2017) 652 final)

Reporting on implementation of Directive 2014/94

–
assessment of national policy frameworks (NPFs)

Action at EU level to complement and better implement NPFs:

- Collaboration (TEN-T, urban)
- Investment support (CEF)
- Inter-operability of services
- Integration of transport and energy systems

Facilitating policy dialogue:

- Roadshow in Member States
- Annual conference on clean transport
- Sustainable Transport Forum



Reporting on implementation – are we on the right track?

- Only 25 out of 28 Member States have submitted their National Policy Framework (NPF) under Directive 2014/94 on alternative fuels infrastructure
- Commission has assessed NPFs (SWD (2017)365)
 - Completeness, coherence and ambition of NPFs varies greatly
 - Only 8 NPFs fully meet the NPFs requirements
 - Only a few NPFs set clear, sufficient targets and foresee relevant support measures

NPFs combined do not add up to a conclusive picture that provides the long-term market certainty that is needed:

Infrastructure gaps will remain if no additional action is taken - particularly all types of electric vehicles and for LNG refuelling points for heavy duty vehicles, and LNG coverage in ports



Collaboration - TEN-T corridors: Forerunners for alternative fuel infrastructure

- The Commission together with European TEN-T Coordinators will promote full and better coordinated roll out along TEN-T corridors:
 - Setting concrete examples for large-scale infrastructure deployment
 - Boosting cross-border continuity and coherence
 - Mobilising 'newer' TEN-T actors and stimulating their cooperation (fuel suppliers, vehicle industry, local, regional and national authorities etc.)
- **Concentrating EU funding & seeking complementarity with planned national actions**



Financing support through CEF

CEF blending call with budget available €1.35 bn

First cut-off date (€1 bn available, **€2.2 bn of request**):

- 68 proposals submitted, **17 proposals in cohesion MS**
- ERTMS, **Innovation and urban nodes** with larger oversubscription
- Good support from promotional and private banks

Next step, second cut-off date April 12 2018:

- **€350 million top up for innovation/deployment of alternative fuels.** Minimum required size of projects for project under 'Innovation': **€5 million.**
- **Projects located on urban nodes** of the core network can apply under the innovation priority if the main scope of the proposed action is relating to the deployment of alternative fuels

CEF Debt Instrument and NER300

- **NER 300 funds:**
 - **Commission Decision: up to €450 million available** to support projects promoting **innovative, replicable and scalable use of RES**
 - From 1st half of 2018: funds ready for project support using the EDP (InnovFin) and **the CEF Debt Instrument for transport**
 - **CEF Debt Instrument financing can be combined with CEF grants under blending call**

Interoperability for consumer buy in

- Consumer buy in is facilitated by smooth access to the infrastructure and its affordability
- Timely, reliable information about the location and availability of recharging or refuelling points and seamless, interoperable payment services will have a major impact
- Such services are far from being a reality across the EU

- all parts of the necessary infrastructure need to be digitally connected
- a broader range of industry-supported standards, data formats and communications protocols is needed

Interoperability for consumer buy in

- **accessing, sharing and re-using data** : delegated regulations under the ITS Directive should be swiftly implemented - needed data should be collected and processed
- Member States should designate **authorities for the registration of unique e-mobility identification codes**.
- **broader range of industry-supported standards, data formats and communications protocols** is needed

The Commission will

- Set up a CEF procurement support action for supporting identification and collection of data (done)
- launch a public consultation on interoperable payment services based on open standards (very soon)
- adopt an implementing act on fuel price comparison (May 2018)

Need for better collaboration

The Commission will actively support the process of further implementing the NPFs in 2018:

- Through a **roadshow in Member States**, explaining existing and upcoming opportunities for collaboration and funding
- Through **a high level policy conferences** inviting all Member States to discuss state of play, starting in late autumn 2018
- Through the **expert group on implementation under the Sustainable Transport Forum** of DG MOVE (March 2018)
- Through reflecting the state of play in **European Semester reporting** and EU project funding allocation
- Through the **next annual SUMP forum** to work with public authorities on adapting Sustainable Urban Mobility Plans by spring 2018