

An Analysis of the German Electric Mobility Market from an International Perspective

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- Owner-managed company, founded 2009
- Consulting services for ministries, public authorities and private companies
- Topics: mobility, digitisation, innovation funding etc.
- Approach: Building a broad consensus for controversial issues by including perspectives of all stakeholders.



- 4 showcases in 6 German states
- 145 projects (90 federally sponsored, 40 state sponsored, 15 associated projects)
- Duration 2012 – 2016
- Objectives: Pooling of German competences in the field of electric vehicles, energy supply and transport systems and visualization of e-mobility in regional demonstration projects and pilot plans.



eMobilität
in Niedersachsen.



Berlin-
Brandenburg

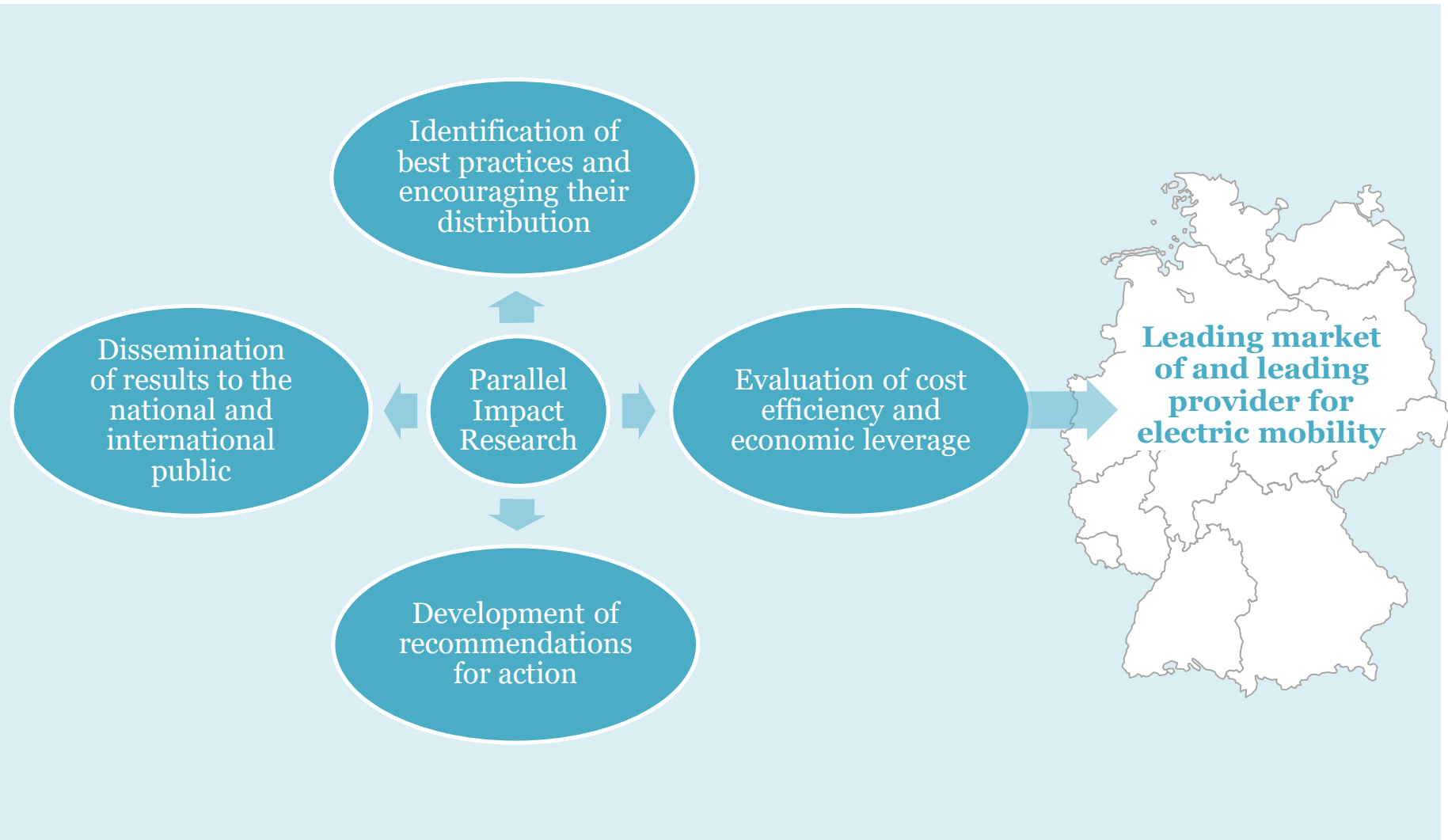


BAYERN – SACHSEN
ELEKTROMOBILITÄT
VERBINDET



Unterstützt durch das Land Baden-Württemberg

Objectives of Parallel Impact Research



- 2,500 passenger cars, thereof approx. 90 % BEV
- 1,000 Pedelecs
- 8 light vehicles
- 20 motorcycles



- 65 busses
- 71 commercial vehicle
- 15 municipal vehicles



1,990 AC charging points

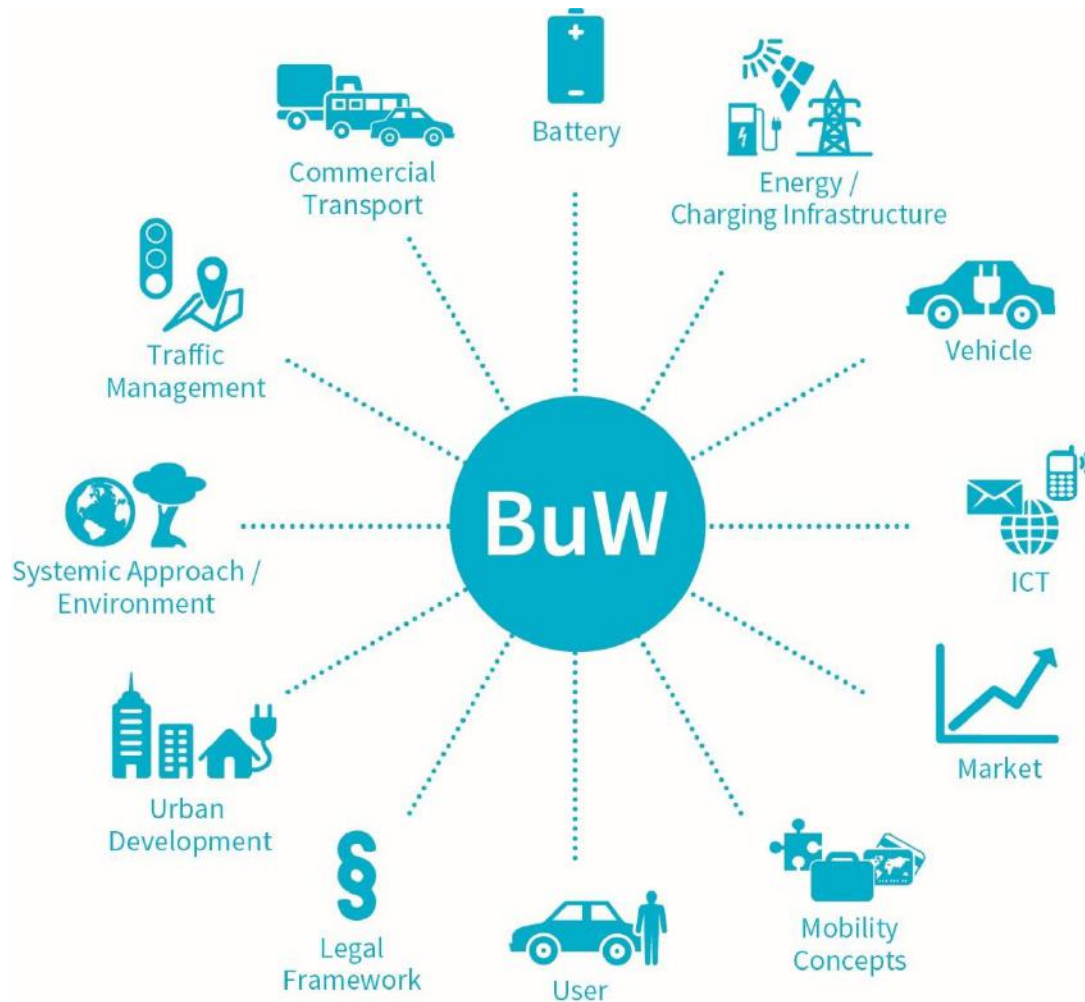
105 DC charging points

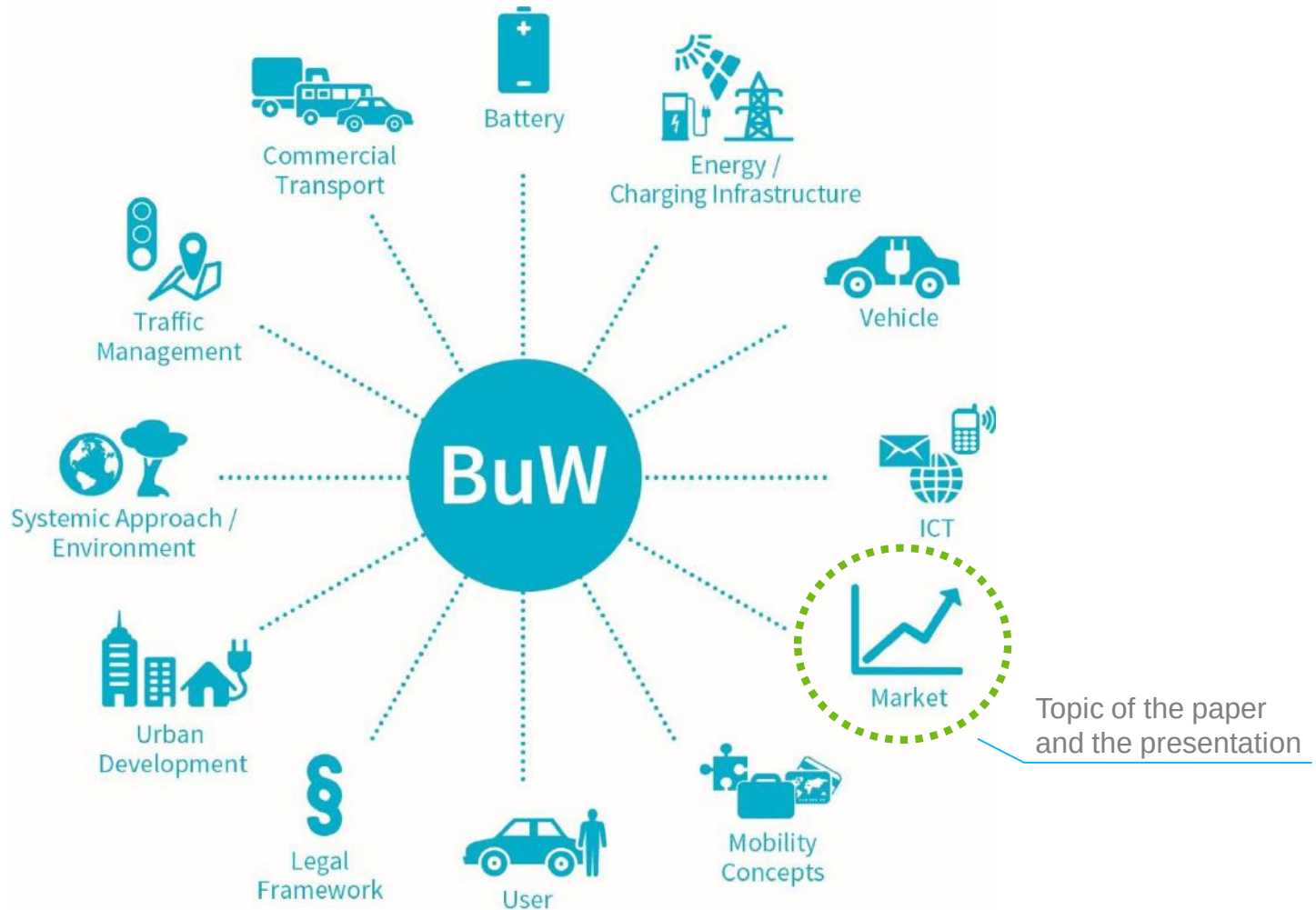
3 inductive charging
points

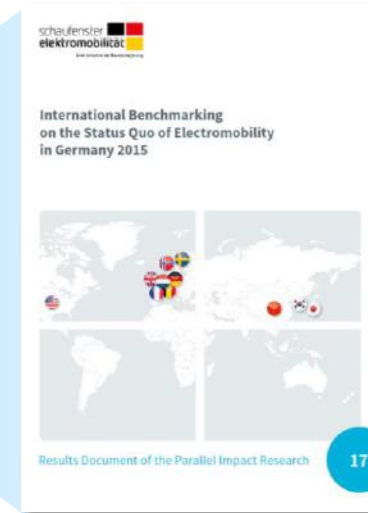
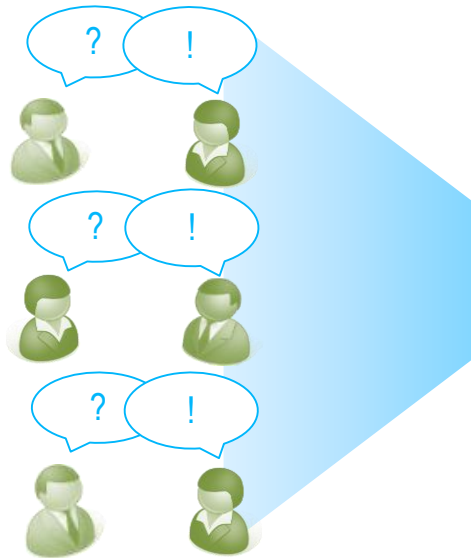
Approx. 2,100 charging points in
total



- ✓ Electric mobility is already suitable for everyday use.
- ✓ An increasing number of application scenarios is already profitable.
- ✓ Regulatory barriers were and are removed.
- ✓ The cars of the future will be electric.







45 Expert interviews

- semi-structured guidelines
- IAA, World of Energy Solutions, eCarTec, 5th International Conference on the Internet of Things
- Additional telephone calls

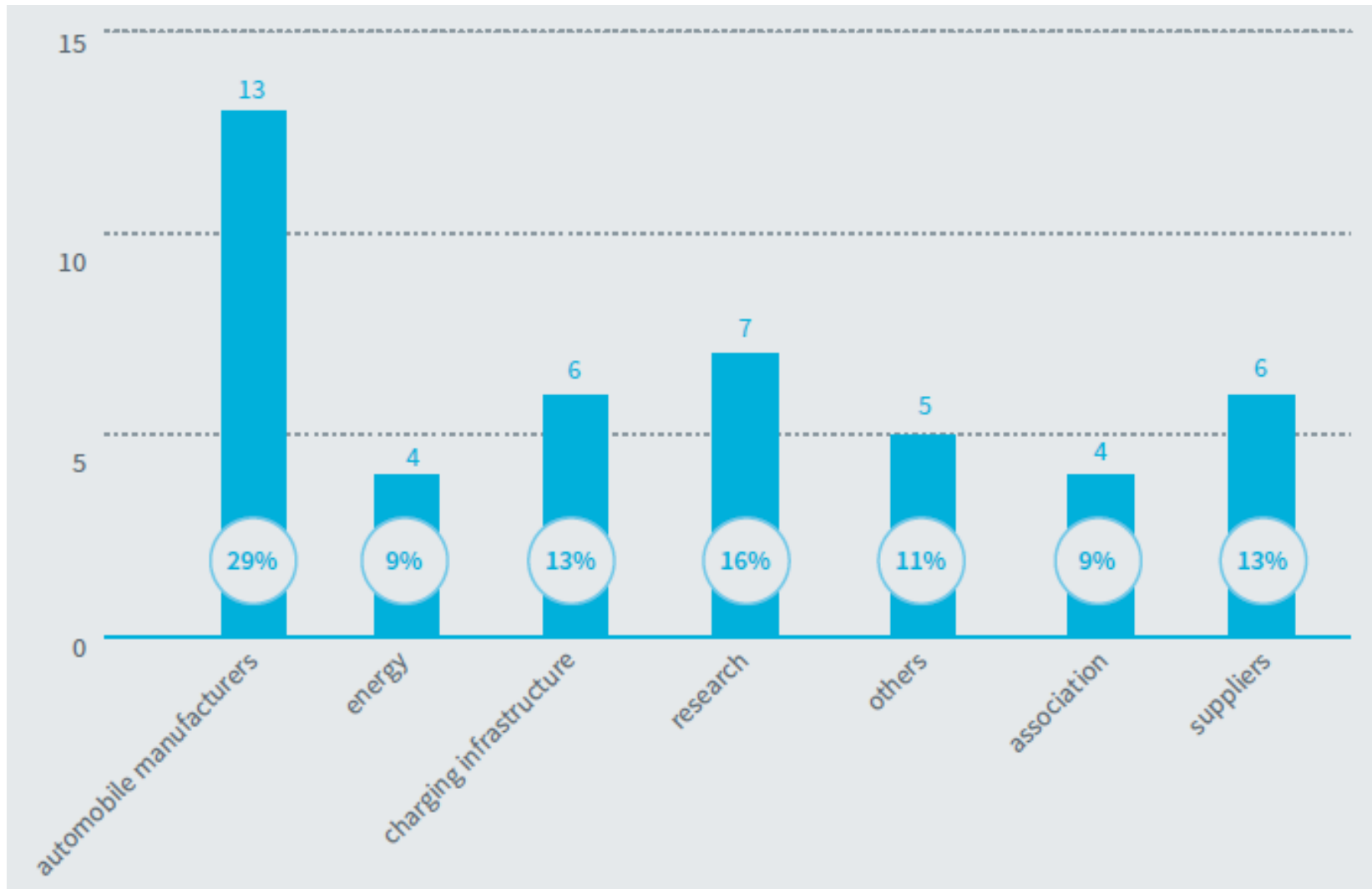
Content analysis

- Structured analysis

All-encompassing view

of the specific situation of the German industry and market

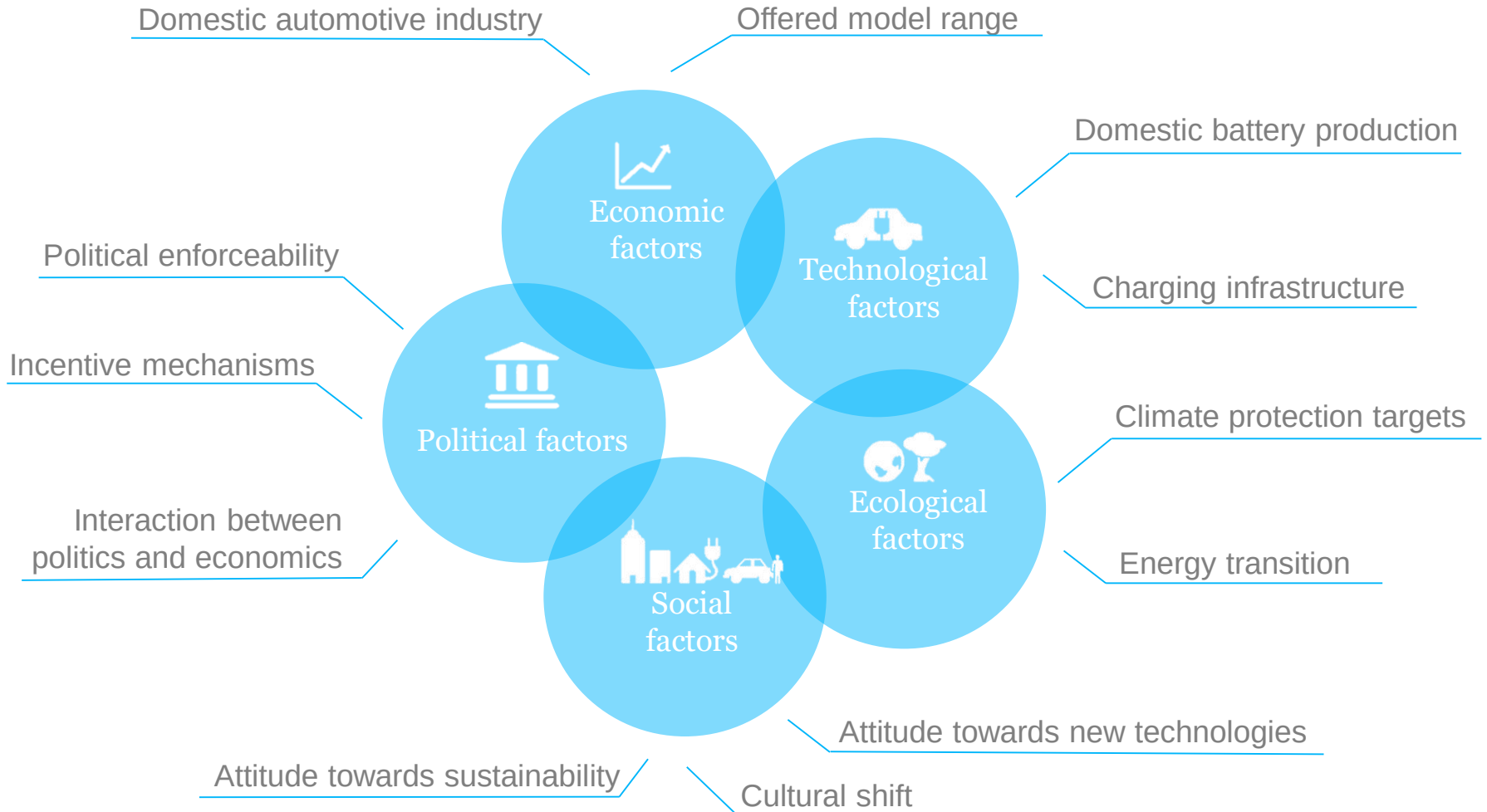
Overview of the Interviewees by Industry



Overview of the Interviewees by the Country of Origin of their Organisations



Barriers and Drivers for Electric Mobility

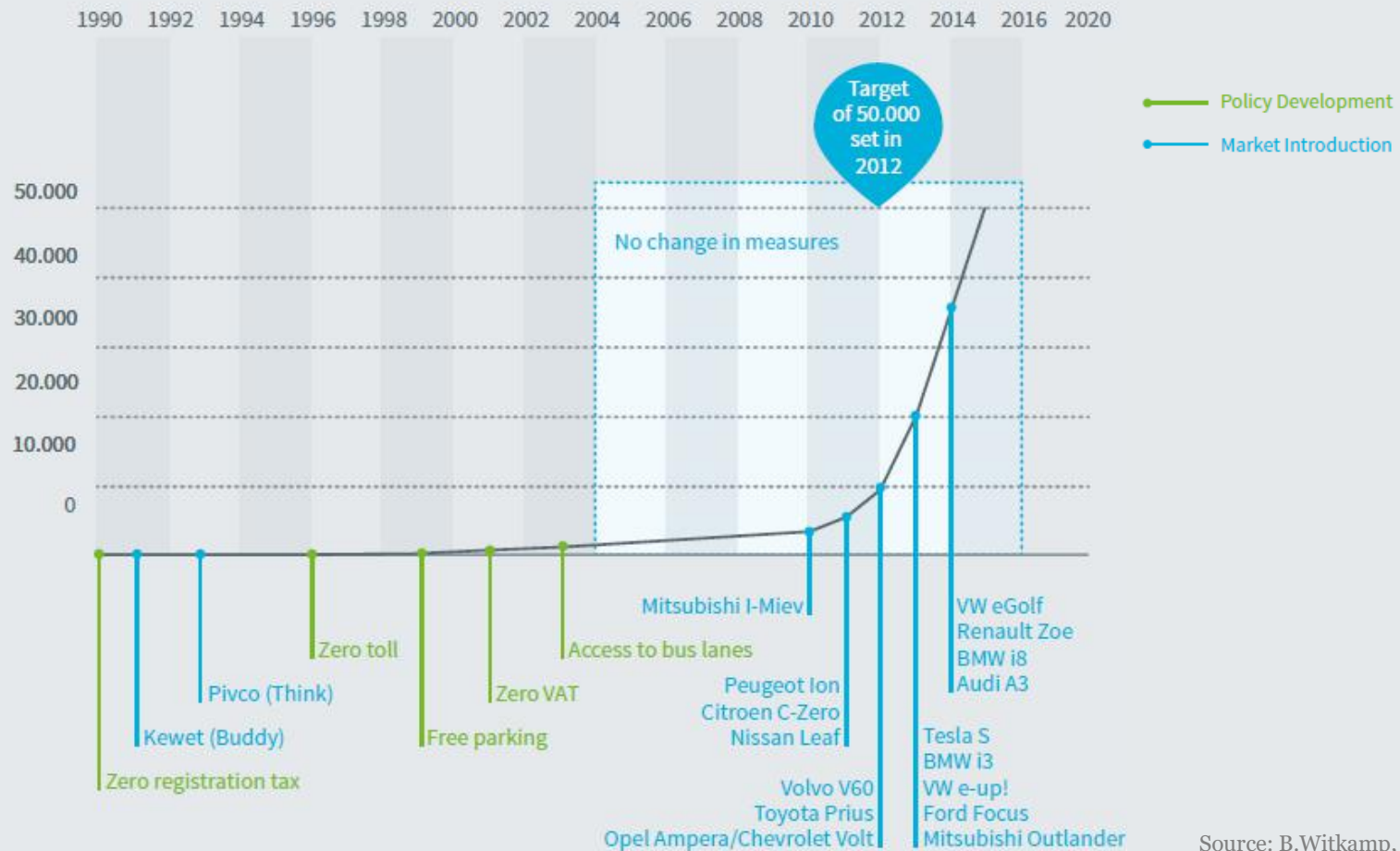


Overview of Incentives and their Application by Country

	 Netherlands	 Norway	 France	 China	 South Korea	 Japan	 USA
Car tax exemption or reduction related to CO2 emissions	●	●	●	●		●	●
Tax cut of company fleet cars	●	●	●				
Exemption from VAT		●		●		●	
Buyer's premium			●	● (regional)	●	●	●
Access privileges for EVs (environmental zone, extended delivery times, toll cuts)	●	●	●	●			
Privileged Parking (free of charge, EV exclusive parking ...)		●		●			●
Access to privileged lanes		●			●		●

Market Ramp-up in Norway

Accumulated sales of electric cars, Norway



The Role of the Automotive
and Supplier Industry

Public charging infrastructure

Product Portfolio

Regulatory framework

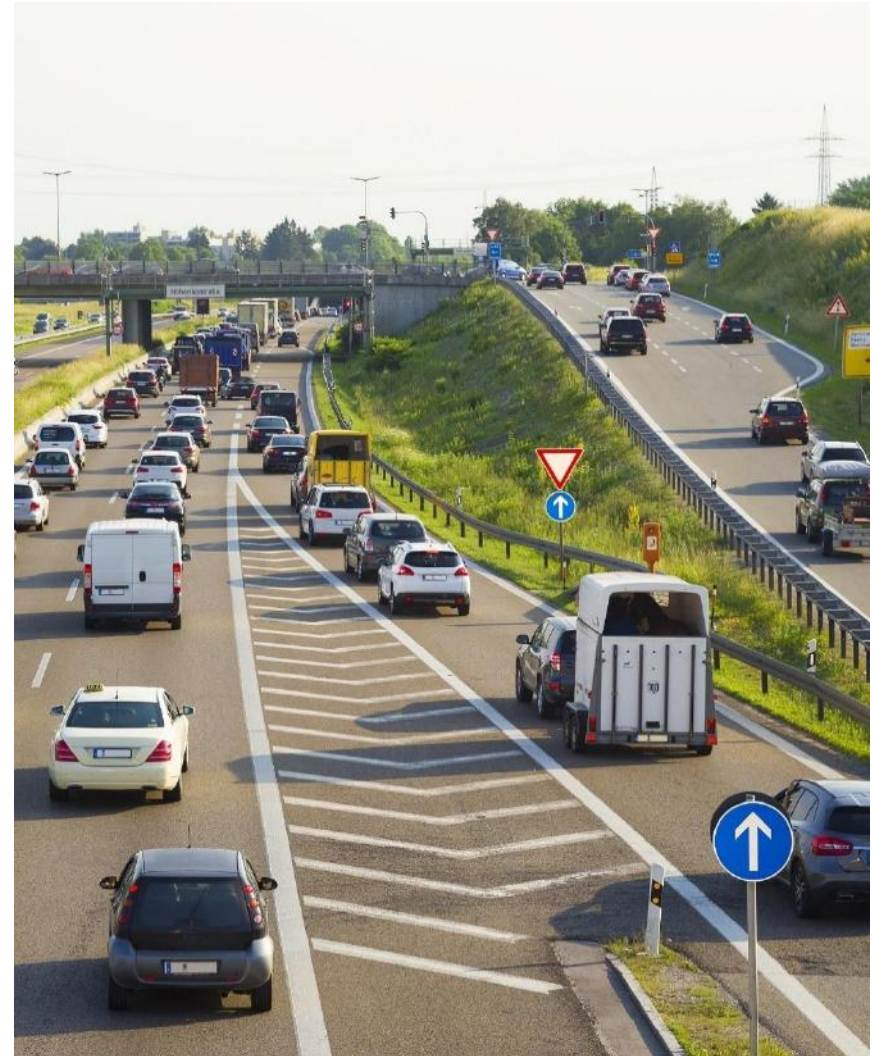
Battery Production

Challenges during Market
Ramp-up and the Role of Politics

Market Potential



- ➡ The **strategy of the German car manufactures** to rely on plug-in hybrids is seen critically.
- ➡ The greater the **number of electric models** in different vehicle categories and for different purposes, the stronger the customers' demand for e-vehicles.
- ➡ German car manufactures must swiftly expand their model range for **light commercial vehicles**.



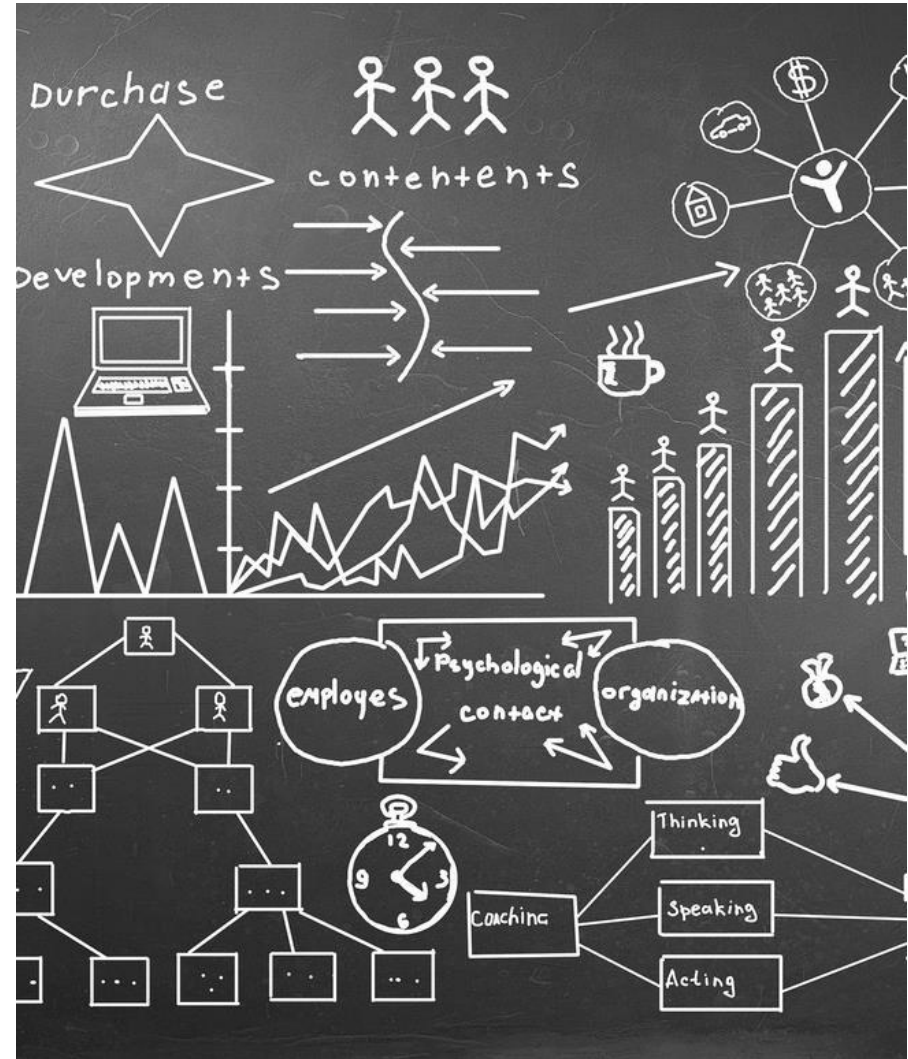
Implications for Germany: Role of the Automotive and Supplier Industry



The technological shift is in Germany more disruptive than in other countries. To promote it and to implement new business strategies is a **major cultural challenge** for German car manufactures.



Political “**wake-up calls**” are required so that the necessary changes are not missed.



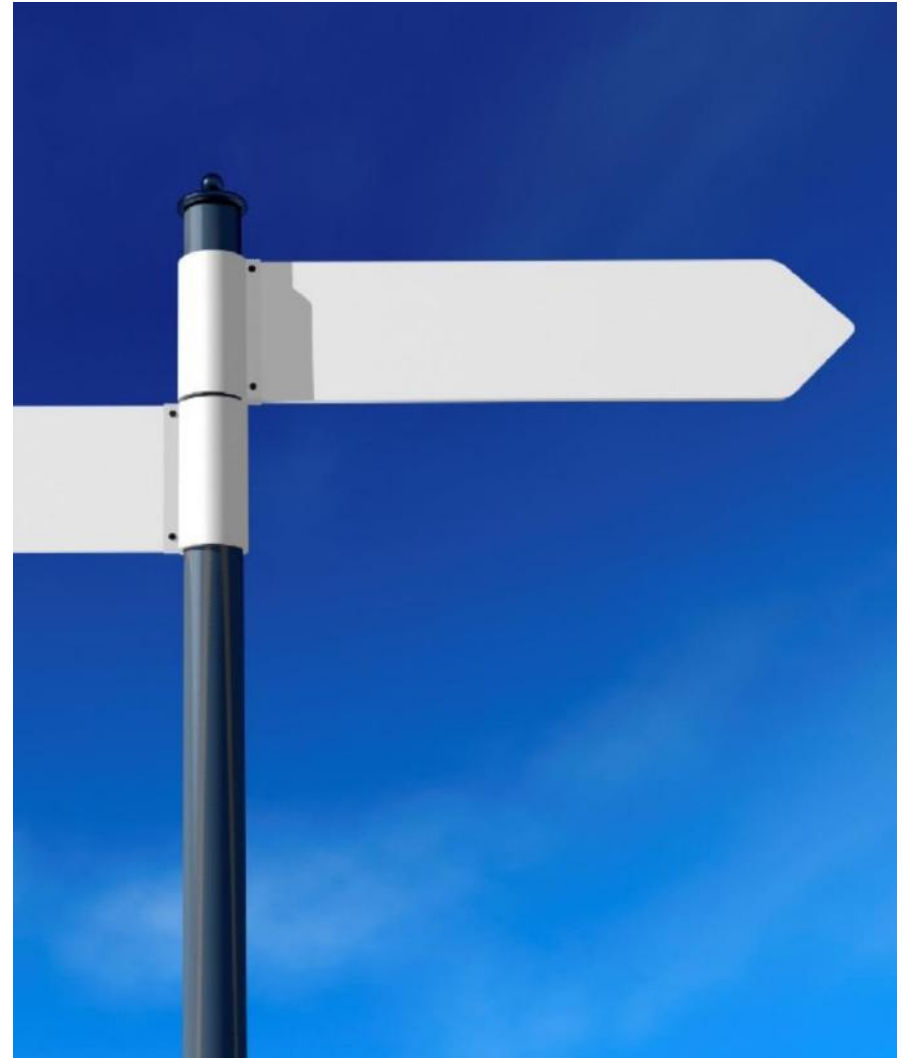
Implications for Germany: Public Charging Infrastructure

➡ If the market players cannot come to an agreement, **regulatory efforts** must be made to fulfill customer needs.

➡ A special task is the effective integration and **unification of the access** to charging infrastructure on a European level.



- ➔ Many regulatory obstacles to e-mobility have either been removed already or are in the process of being removed
- ➔ The European regulations regarding CO₂ limits should be stricter.



The complete benchmark analysis can be downloaded in the media centre on our website

<http://schauenster-elektromobilitaet.org>

Or here in the conference room

Visit us in the Exhibition

Booth 815 – German Pavilion

International Benchmarking on the Status Quo of Electromobility in Germany 2015



Results Document of the Parallel Impact Research

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Thank you for your attention!

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