

# Infrastructure key in driving e-mobility transition

Insights and best practices from international markets

Berlin, June 20, 2024

# Giovanni Palazzo

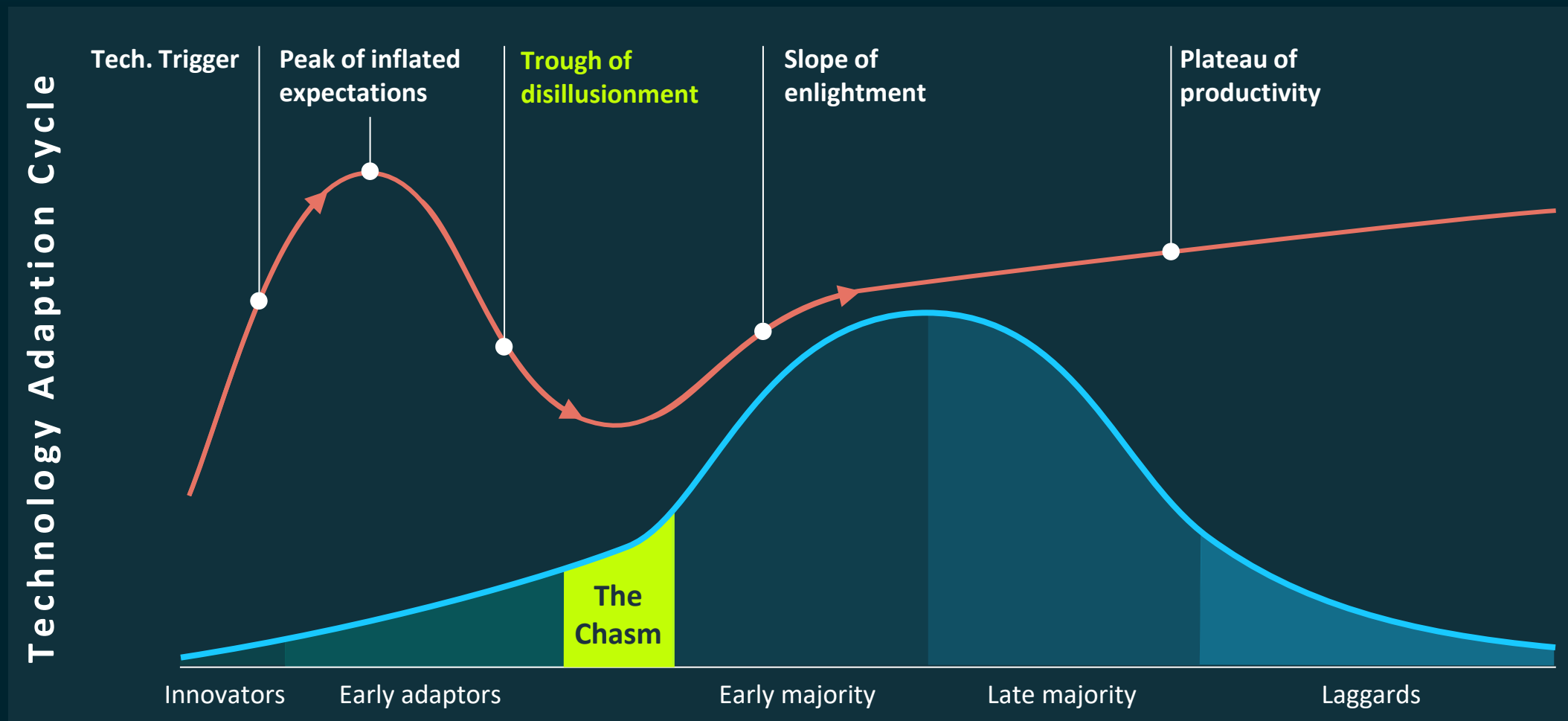
Senior Vice President Charging & Energy Volkswagen Group & CEO Elli

# BIGGEST TRANSFORMATION

in the history of the automotive industry

# BEV market ramp-up is going through critical phase

Some cooldown after the initial “hype” is normal with new technologies



# Charging & Energy across the globe



## North American market

Largest fast-charging network

110% increase of charging sessions  
since 2023



## European market

One of the largest MSP network in Europe

Extension of HPC charging network

Managed-Battery-Network



## Chinese market

Approx. 12,000 charging points

3.5 million users

202 cities covered



# ID. Buyer studies 2023 | Germany

## Where customers charge today

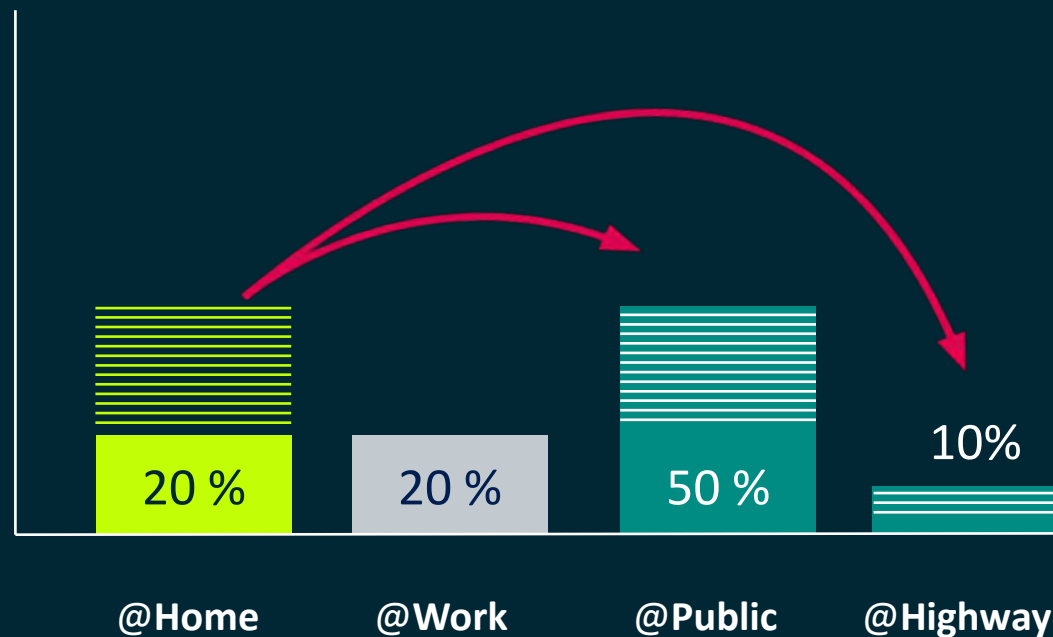


5%  
not at  
home

95%  
at home



## 2025 + Mass market



@Home

@Work

@Public

@Highway



# Infrastructure development needs focus

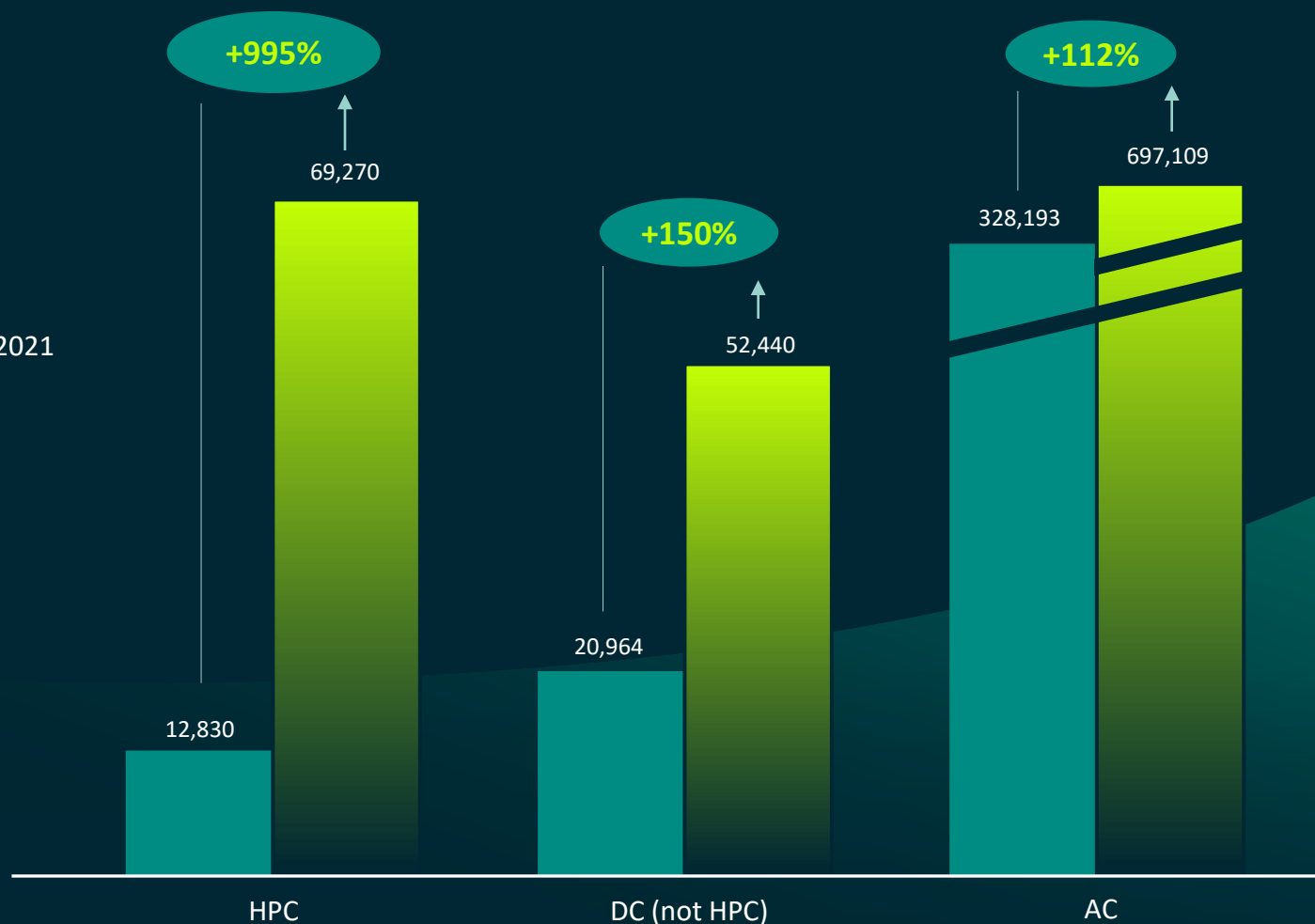
We must develop use cases close to everyday life



Europe overall

**126%** Overall charge point growth since 2021

2021  
 2024



Source: EAFO (2024)

# Best practices and successes from international markets

## Energizing public sites

### Best practice

NL started „Nationale agenda laadinfrastructuur“ in 2020

- ☑ Brings together all relevant state levels, DSOs, industrial stakeholders
- ☑ All regions must establish a “recharging vision” + “site policy”

## Grid development and connections

### Best practice

City of Stockholm established 6-step-process to reduce installation time to max. 7 months

- Single point of contact for grid connections
- Identifying all possible sites and show estimated costs for grid connection
- Clear deadlines for approvals and grid connections

## Incentivize private investment

### Best practice

USA Inflation Reduction Act offers tax credits of up to 30% on invest per charge point

- Reduces financial barriers for new investment and strengthens market development
- US government steers investment towards specific locations and use cases



# Mobilize private investment in Germany's charging infrastructure

## Energizing public sites

### Possible instruments

- Create “charging partnerships” on state or municipal level

- Identify charging and grid expansion needs, possible sites, and develop common strategy
- More transparency on sites and grid situation will make investment decisions easier

## Grid development and connections

### Possible instruments

- Establish single point of contact (digital) for grid connection requests across Germany
- Set clear deadlines for information on costs and approval / denial of requests

- More transparent grid connection and approval procedures increase security for investment decisions
- Faster end-to-end installation times will increase charging infrastructure visibility and strengthen consumer confidence

## Incentivize private investment

### Possible instruments

- Set more ambitious AFIR + EPBD targets
- Tax credit incentives to boost infrastructure development in most needed areas

- More ambitious mandatory targets for specific use cases (charging in cities and at work)
- Targeted incentives can help to overcome “chicken/egg problem” in specific cases

## Key takeaways

1



**Financial incentives** for charging infrastructure in needed use cases

2



Make **grid connection** processes easier, faster and more transparent

3



Strengthen **stakeholder dialogue** & **commitment** on municipal level



# ENERGIZE EUROPE

## LET'S CHARGE FORWARD