



SUSTAINABLE & SMART MOBILITY STRATEGY
Fleet Electrification and EU Transport Policy:
Turning Regulation into





## **AFIR Reporting**

#### National Policy frameworks (Art 14)

- Member States to draft National Policy Frameworks (draft by 1.1.2025, final version 1.1.2026)
  - Detailed Target setting in line with mandatory targets
  - Measures to support the roll out of that infrastructure
  - Development of detailed strategies for the use of clean fuels in waterborne transport and aviation
  - Iterative process with Commission

#### Reporting (Art 15 – 18)

- National progress reports (details in annex I) every two years
- Reports on smart and bidirectional recharging every three years
- Annual reporting on electric vehicle uptake and deployment of recharging points to ensure compliance with fleet-based targets
- Mechanism to ensure that targets are reached

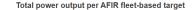


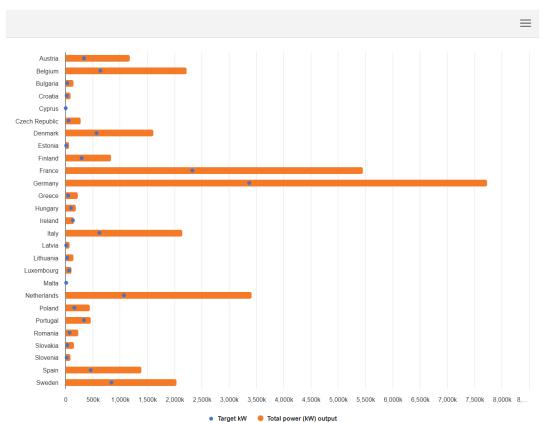
# Status on NPFs submissions

- Status NPFs
- 17 Member States submitted their NPFs
- NPFs urgently needed to meet overall process timeline
- Initial assessment ongoing by consultants
- Next steps: possible recommendations to MS six months after submission



## **AFIR fleet-based target**





# Commission Guidance on interpretation of AFIR

- Ensure common application/interpretation in all Member States
- Based on input from 60+ stakeholders and Member States via STF
- Available on MOVE website on art. 2 and 5 (definitions and operation of recharging infrastructure)
- Questions and Answers on the Regulation on the deployment of alternative fuels Infrastructure (EU 2023/1804) - European Commission



# Commission delegated and implementing acts recently adopted

- Commission Delegated and Implementing Acts on Data
  - Additional data categories, data format, frequency, quality and technical requirements on API
- Commission Delegated and Implementing Acts on new standards
  - Complementing Annex II (ISO 15118, wireless recharging, ERS, ...)
  - Governance framework for ISO 15118 and EU PKI ecosystem



# Current political context and new legislative proposals

- Strategic Plan for the automotive industry; revision of CO2 standards
- Corporate fleets legislative act to be adopted at the end of 2025
- Review of AFIR in 2026



## **AFIF support 2021-2023**



Recharging points E & SMART

STRATEGY

# AFIF 2024-2025 - Timetables and deadlines

Deadline for submission

1st cut-off

2nd cut-off

3rd cut-off

24 September 2024

11 June 2025

4 March 2026

Information on results

January 2025

October 2025

*April 2026* 

GA signature

May-Jun 2025

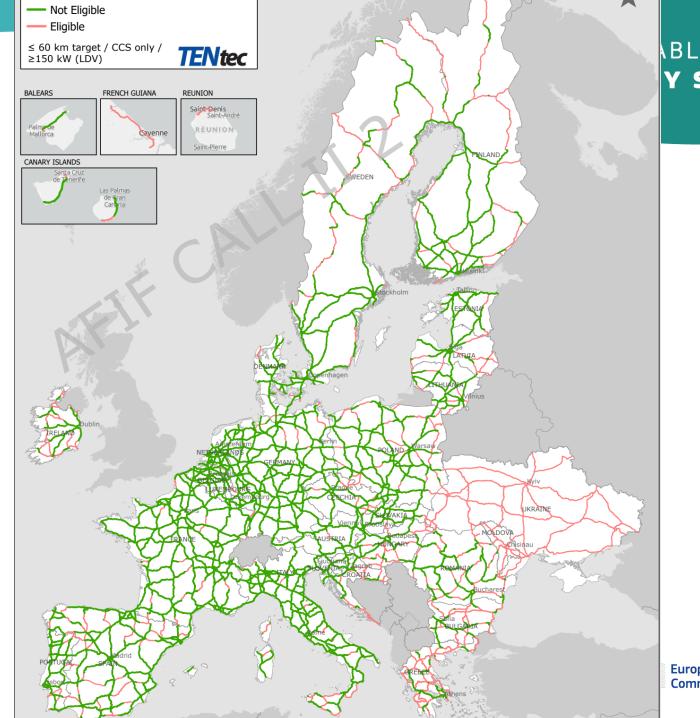
Feb-Mar 2026

Aug-Sep 2026

Financial Agreement with banks to be signed within 12 months after the cut-off date

Project duration up to 39 months



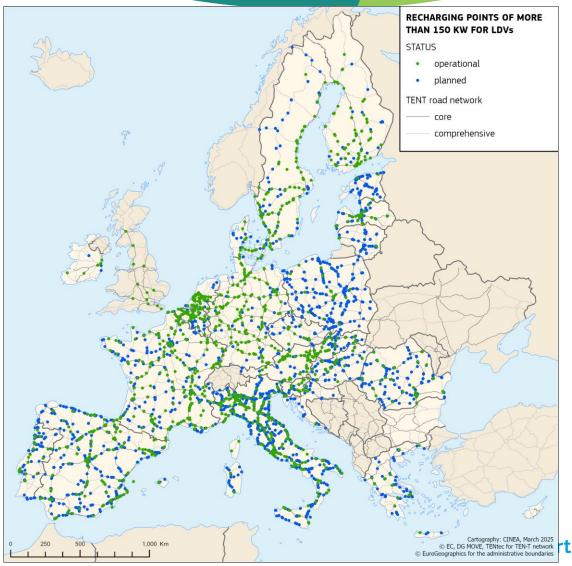


# BLE & SMART Y STRATEGY

European Commission Mobility and Transport

# Alternative Fuels Infrastructure Regulation (ASUSTAINABLE & SMART MOBILITY STRATEGY Alternative Fuels Infrastructure Facility (AFIE)





### **Clean Transport Corridor Initiative**

- Market is in early stage of deployment for HDV recharging infrastructure
- But strong market interest B2B market recharging will be profitable more quickly
- September 2024 cutoff from AFIF is being financing up to 1540 350 kW chargers and up to 530 MW chargers in around 600 locations in 17 Member States
- June 2025 cut off will provide another EUR 580 million
- This covers already 20% of locations and around 15% of aggregated power output required under AFIR for 2030 (this is a sufficient minimum, not the optimum)
- Member States provide additional support, sometimes comprehensively (ie DE, PL, SE)
- Main challenges:
- Need to ensure that EU and MS support complements each other, good planning, no distortion
  of market investment
- Need to avoid that projects get delayed because of time it takes to get access to grids
- Need to have transparency on demand and on grid hosting capacity

### Planning of Clean Transport Corridor Initiative

#### Phase 1 "Mapping"

- Map AFIF projects and locations to the TEN-T corridors, focusing on Member States and EU funding
- Scandinavian Mediterranean (SE, FI, DK, DE, AT, IT) and North Sea Baltic (NL, BE, DE, PL, EE, LV, LT, FI)
- Meetings held with Member States authorities during April and May, further discussions planned for June and July
- Phase 2 "Fast-tracking"
- Identify actions to fast track: streamlining of permitting, leveraging financing etc
- Financing: can use AFIF, cohesion spending, what about InvestEU?
- Meetings with MS will be important to identify opportunities for collaboration
- Need to discuss non-grid permitting aspects.
- Aim to present first results in Q3 2025

#### Alternative Fuels Infrastructure Regulation AREIRSMART MOBILITY STRATEGY Sustainable Transport Forum (STF)

#### Summary of reports recently published

- Guidelines for tender procedure for deployment of public electric <u>recharging infrastructure for cars and vans</u>, developed by STF subgroup on Public Authorities
- https://op.europa.eu/en/publication-detail/-/publication/0cf64e65-f4d3-11ef-b7db-01aa75ed71a1/language-en
- Guidelines on supporting the expansion of recharging infrastructure tailored for specialised and captive fleets
- https://op.europa.eu/en/publication-detail/-/publication/19c8c4f3-008a-11f0-9503-01aa75ed71a1/language-en
- Guidance of fire safety for electric vehicles parked and charging **Public Authorities** 
  - infrastructure in covered parking spaces, developed by STF subgroup on







# SUSTAINABLE & SMART MOBILITY STRATEGY

# Thank you











18 June 2025

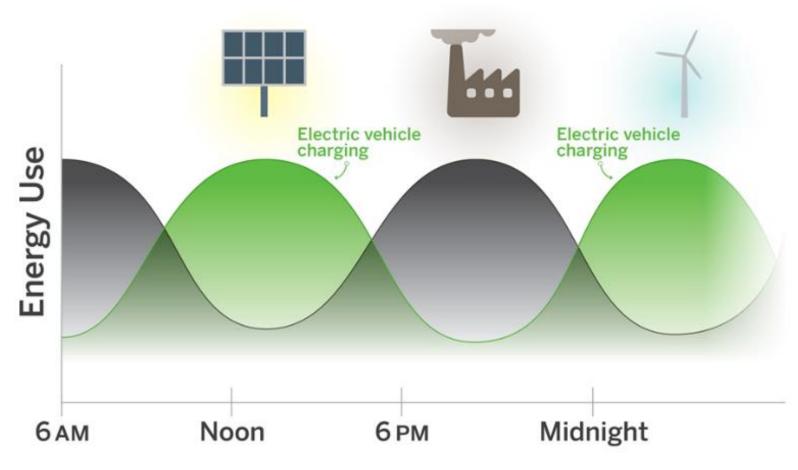
# EV fleets & power grids – benefits and policy solutions

**EVS38 Gothenburg** 

Dr. Julia Hildermeier Team Lead E-Transport jhildermeier@raponline.org

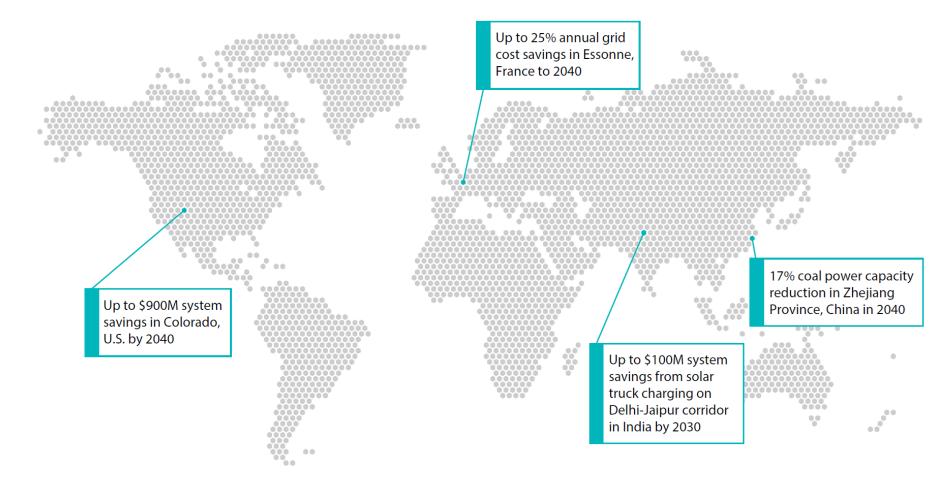


# 1. EVs can clean up transport and grids

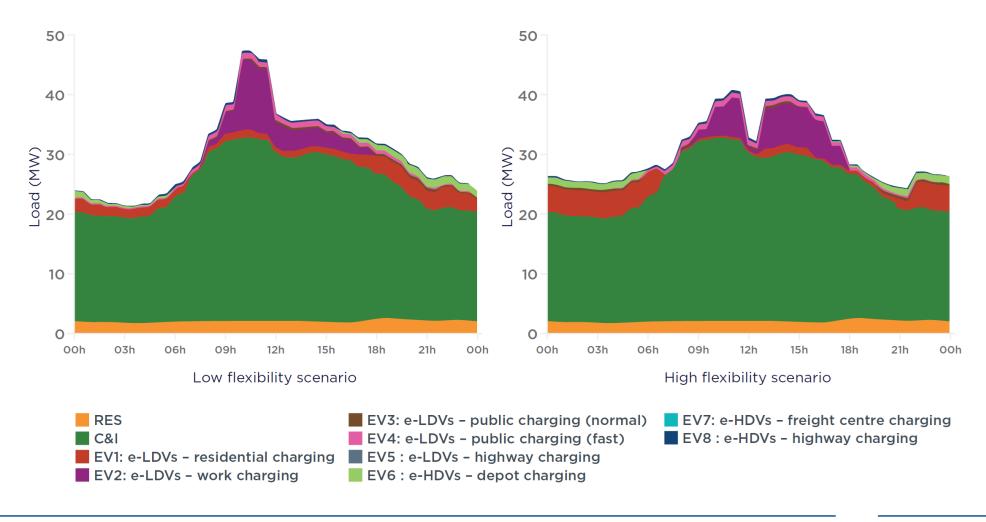


For illustration purposes only. Source: RAP

# Smart charging saves cost everywhere



# Case study France: workplace charging



# 2. Policy framework for smart EV charging

- Encourage EV supply: Keep ambition level of CO2 Standards & fleet mandate
- Reform grid connections
- Make network pricing more cost-reflective
- Smartly design public tenders for charging infrastructure
- Support logistics/depot electrification

Regulatory Assistance Project (RAP)®

# 3. EU policy opportunities

Vehicle CO2
Standards,
Corporate Fleet
Mandate

AFIR implementation & Clean Corridors

Network pricing guidance, Electricity Market Reform implementation

Electrification Action Plan

**Grids Package** 

## Key Messages

- Leverage grid benefits from EV fleets
- Develop smart charging policy framework
- Energy and transport stakeholders need to collaborate



### **About RAP**

Regulatory Assistance Project (RAP)<sup>®</sup> is an independent, global NGO advancing policy innovation and thought leadership within the energy community.

Learn more about our work at raponline.org

## Resources

- The power of moving loads. Cost analysis of megawatt charging in Europe.
- ▼Electrifying last-mile delivery. A total cost of ownership comparison of battery-electric and diesel trucks in Europe
- → Smart Network pricing. RAP Power System Blueprint.
- → Flex and the City: cities need dynamic pricing for public charging.
- ▼ EV smart charging: A golden opportunity for distribution system operators
- ▼The joy of flex: Embracing household demand-side flexibility as a power system resource for Europe
- Imagine all the people. Strong growth in tariffs and services for demandside flexibility in Europe

