OICA Round Table
"The World Auto Industry: Situation and Trends”

Seoul, 23 October 2014
Klaus Bräunig
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German Association of the Automotive Industry
OICA Round Table - Presentation session
Subject 2: Green car market situation and policies in Germany

TOP 1  Current situation and forecasts of green car market
TOP 2  State of technology development for green cars
TOP 3  Government incentive policies that promote consumer demand for green cars
TOP 4  Establishment of necessary infrastructures
Subject 2: Green car market situation and policies
Product range of German manufacturers by the end of 2014
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New registrations of electric vehicles in Germany

Cumulated new registrations since January 2009

New registrations according to segment (in percent):

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e-mobility - Which exit? – ‘Fan Strategy’

Fan strategy combines short, middle and long term measures towards sustained mobility.
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e-mobility - challenges

The challenge is to find sustainable, economic, competitive and safe solutions.

The German automobile industry is currently investing heavily in potential solutions.

Within the meaning of the NPE, the German automobile industry has adopted a systemic and market-oriented approach that is open minded about new technologies.

Quelle: Fraunhofer ISI - Roadmap zur Kundenakzeptanz
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e-mobility - solutions
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NPE in Germany - The National Platform Electro-Mobility

- Unique bundle of forces: Industry, Science, Politics, Unions, Associations and NGOs
- Basis: Systemic & market oriented approach, open for all technological solutions
- Common objective: Establish Germany as the Lead Supplier and Lead Market for electric mobility in 2020
- Electric Mobility made in Germany: System solutions, combining climate & resource protection with technology leadership, added value and creation of additional jobs
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NPE in Germany - The National Platform Electro-Mobility

Mega show cases: Bundle resources and create visibility

- Show technological progress and (system) solutions
- Judge assumptions and measurement for early market development
- Demonstrate innovative German e-Mobility solutions under realistic conditions and prepare global commercialization
- Stimulate the demand locally and globally
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Package of measures – creating incentives (proposals NPE)

Non-monetary incentives
- Use of bus lanes/introduction or special lanes
- Priority parking for electric vehicles

Monetary incentives
- Compensation of disadvantages in terms of company car tax
- Tax incentives
- Special depreciation regulations
- Low-interest loans from the KfW

Other incentives
- Public procurement program
- Incentives for commercial electric vehicles
- Electrification of the state car fleet as a role model function / e.g. municipal vehicles
- Urban commercial logistics
- Commercial, public and non-commercial fleet operators

improvement of key-technology for electric vehicles (technology leadership)

lead supplier

offer display window for innovative electromobility-technology (1 Mio. vehicles in 2020)

lead market
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Charging infrastructure

- 85 percent of the required charging infrastructure charging points are privately owned
- 15 percent are realised in public places
The development of the charging infrastructure in public places has slowed down since 2012, amongst other things due to a lack of business and financing models.
International plug standard

- Type 2 charging plug can cope with all relevant power output classes throughout the world: from single-phase domestic AC voltage right up to powerful 63 A 3-phase connections
- Type 2 charging plug is configured so that the highest levels of safety are attained
- Type 2 charging plug offers a standardized and future-orientated plug system in the medium term
- Supplementation with the combo system will enable rapid DC-charging
Thank you for your kind attention!