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# **OICA Round Table**

## **"The World Auto Industry: Situation and Trends"**

**Seoul, 23 October 2014**

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Managing Director

German Association of the Automotive Industry

**VDA**

Verband der  
Automobilindustrie

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# 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

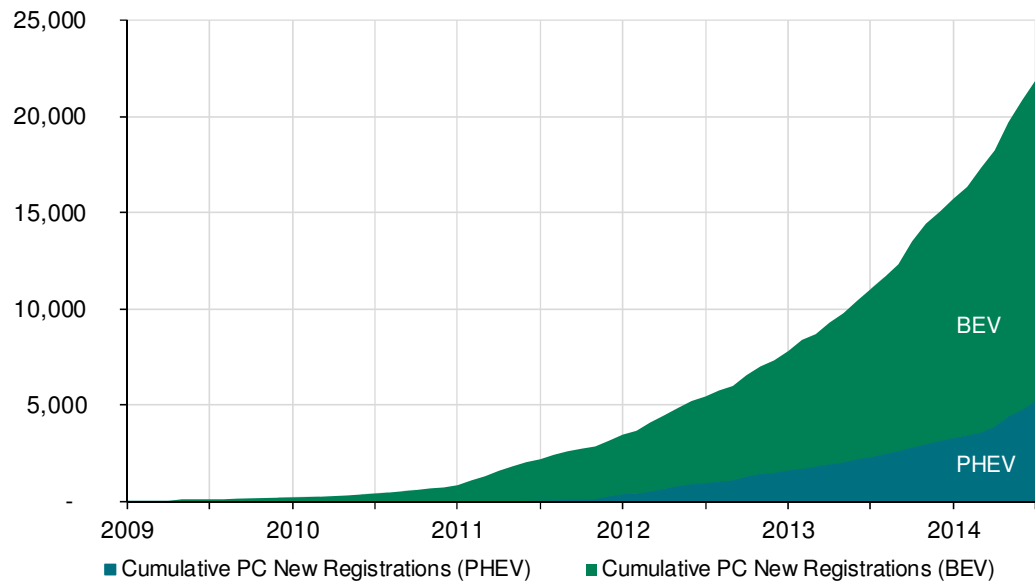
## Product range of German manufacturers by the end of 2014



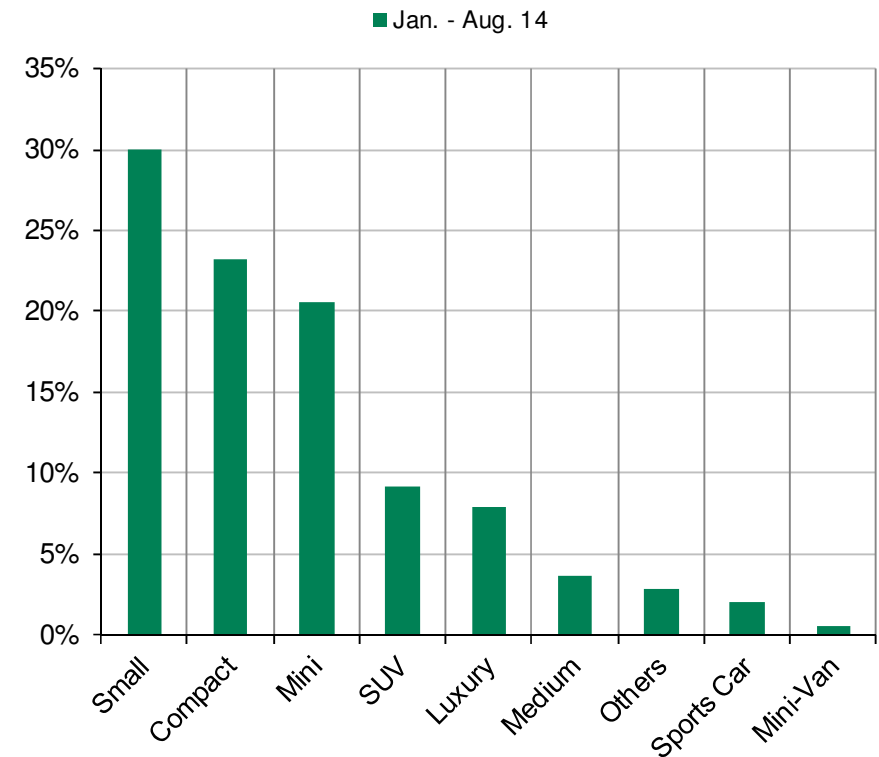
# Subject 2: Green car market situation and policies

## New registrations of electric vehicles in Germany

Cumulated new registrations since January 2009



New registrations according to segment (in percent):



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## Subject 2: Green car market situation and policies in Germany



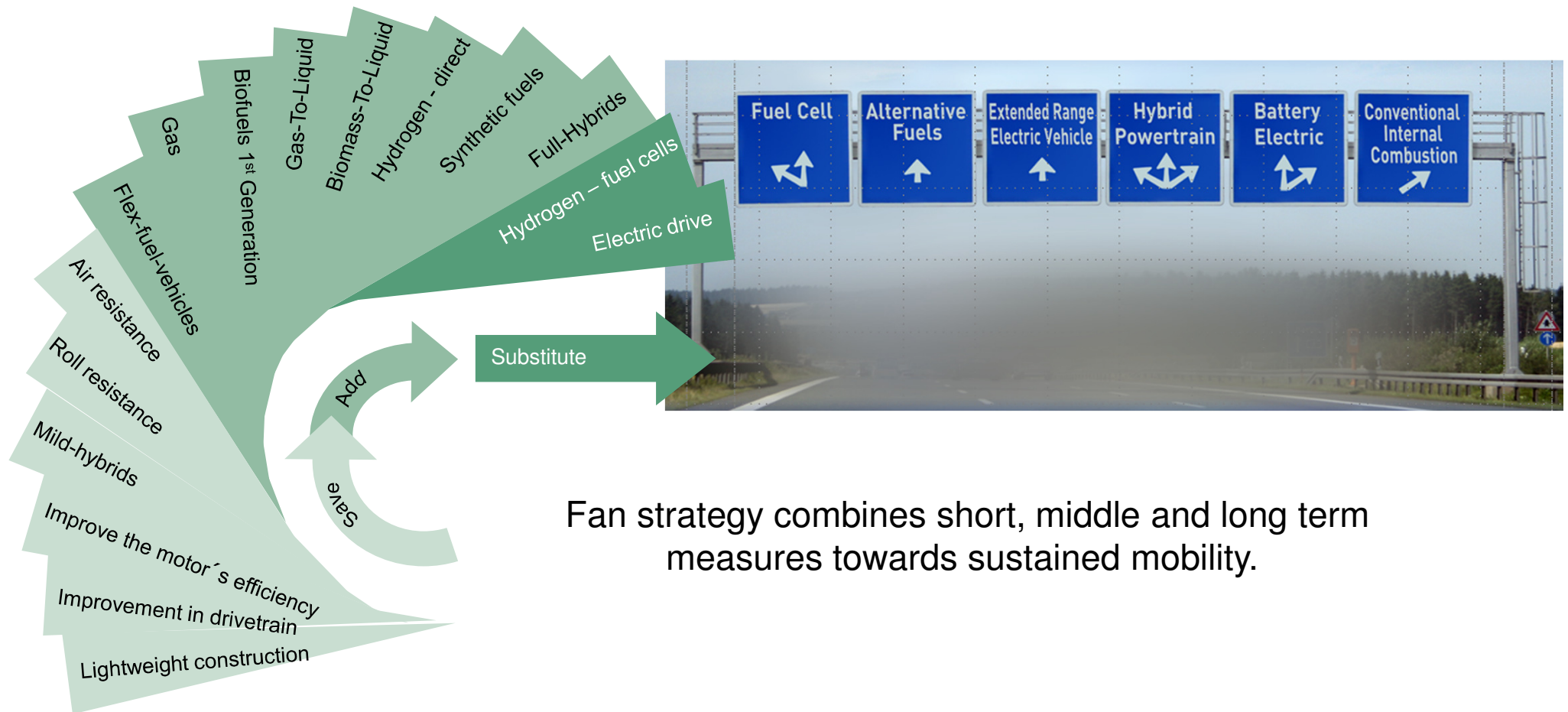
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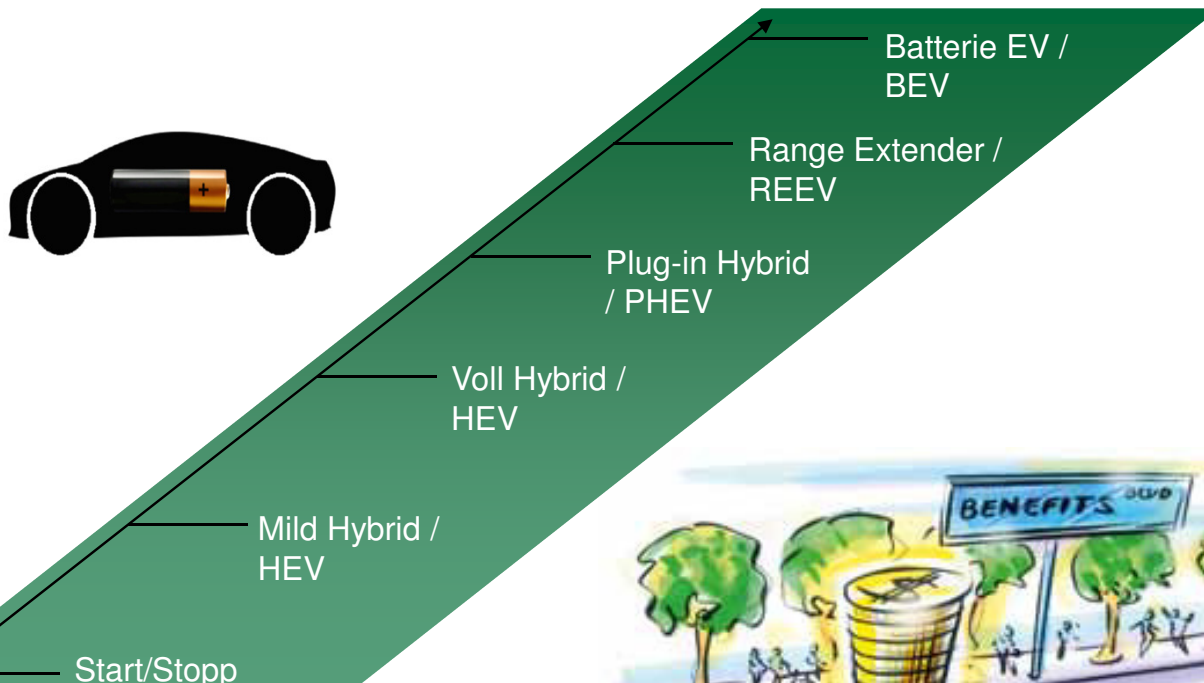
TOP 4 Establishment of necessary infrastructures

## Subject 2: Green car market situation and policies e-mobility - Which exit? – ‘Fan Strategy’



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

## Subject 2: Green car market situation and policies e-mobility - challenges



Quelle: Fraunhofer ISI - Roadmap zur Kundenakzeptanz

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.



# Subject 2: Green car market situation and policies

## e-mobility - solutions



SMG Separate Motor Generator



IMG Integrated Motor Generator



Hybrid Powertrain Management



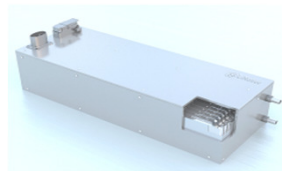
Inverter



Traction battery



Charger



Quelle: BOSCH & Continental AG



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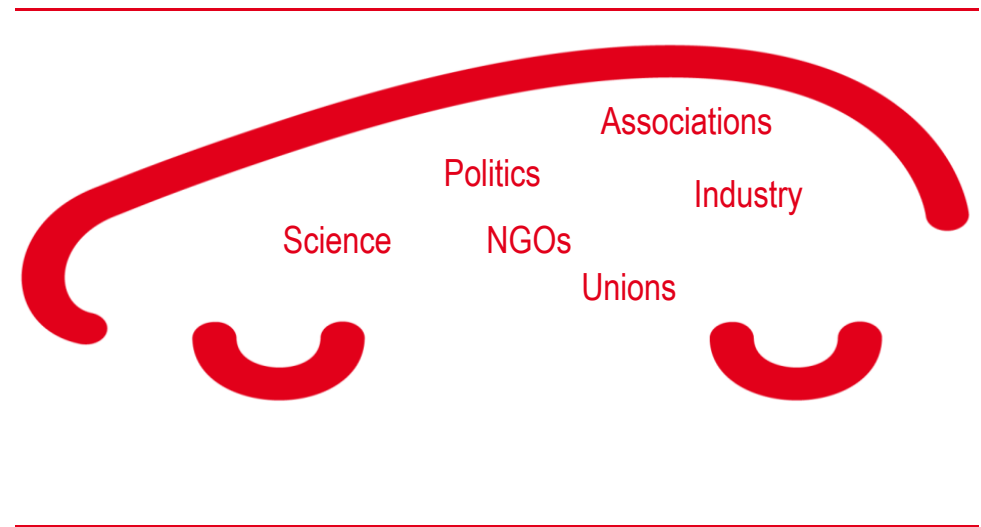
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## Subject 2: Green car market situation and policies

### 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

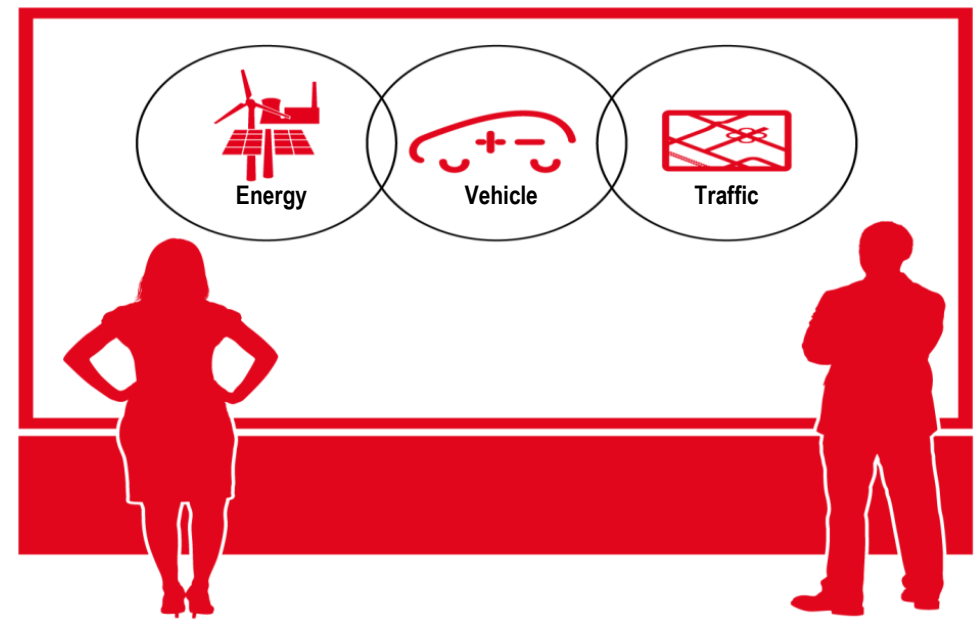


# Subject 2: Green car market situation and policies

## 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



Show cases demonstrate systemic approach

# Subject 2: Green car market situation and policies

## Package of measures – creating incentives (proposals NPE)

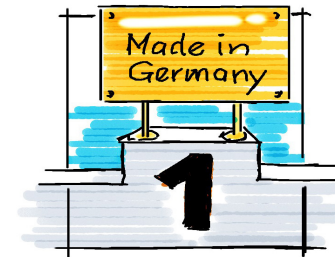
### Non-monetary incentives



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



lead supplier



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

### Monetary incentives



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



lead market



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

### 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

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**VDA**

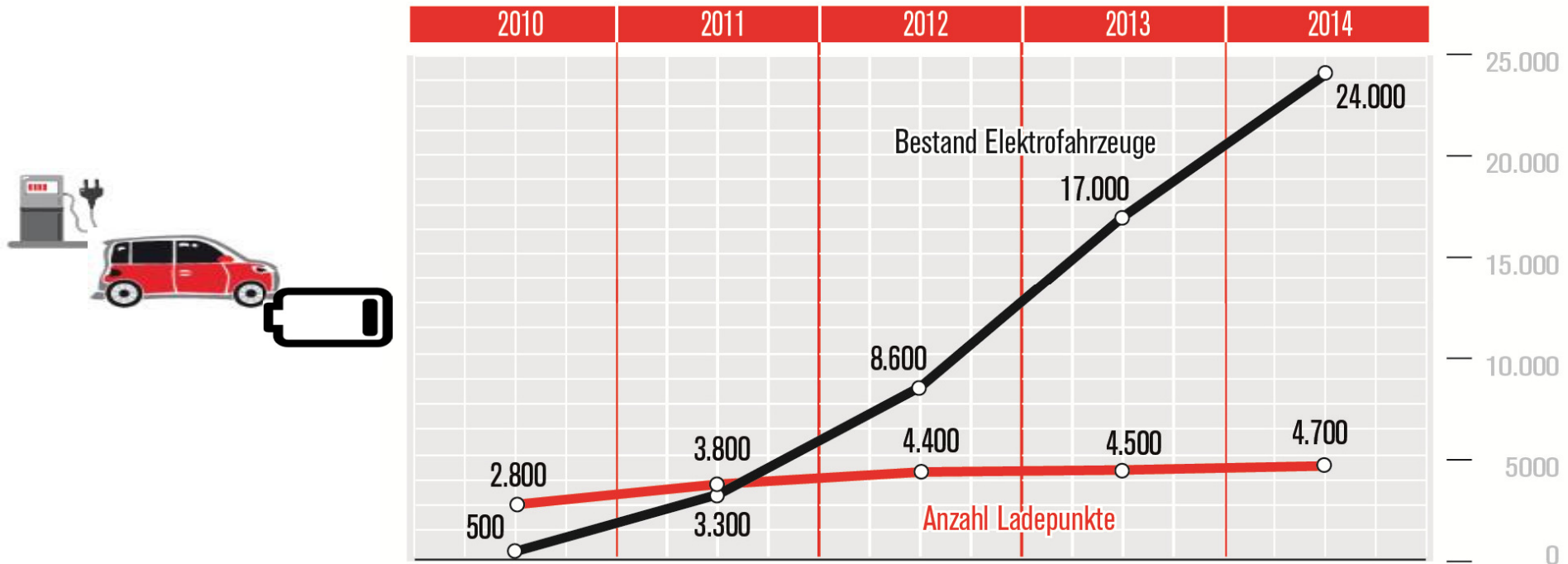
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## Subject 2: Green car market situation and policies

### Charging infrastructure



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.

# Subject 2: Green car market situation and policies

## LIS - International harmonization supports market success

### 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



Safe charging with the Type 2  
Redundant protection on many levels.



Designed for the future  
Type 2 is the core component of the combo system.



**Electromobility**

International plug standard  
for customers

Thank you for your kind attention!