Deployment of infrastructure for alternative fuels in the European Union: time to act

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PURPOSE: to present an action plan to achieve the widest possible use of alternative fuels.

BACKGROUND: by 2025, the EU should have completed basic charging and refuelling infrastructure, ensuring full coverage of the trans-European transport network (TEN-T) core network corridors. **The future deployment of infrastructure** will require significant **public and private investment**.

With the agreement of Paris on climate change in force, it is necessary to accelerate the transition to a modern low-carbon economy. In order for the EU to make a successful transition to low-emission or zero-emission mobility, the Commission believes that an **integrated approach** is required. This requires a common policy framework for vehicles, infrastructure, electricity grids, economic incentives and digital services at EU, national, regional and local levels.

CONTENT: the **Commission's action plan** sets out measures to complement and better implement national policy frameworks (NPFs) under Directive 2014/94/EU on **alternative fuels infrastructure**.

Current situation and needs: although the deployment of alternative fuels infrastructure has recently intensified, the EU now needs to **accelerate deployment** in two areas: first, in the core network and the overall TEN-T network.

The level of ambition between different Member States varies significantly. For example, only two Member State provide more than 100 recharging points for electric vehicles per 100 000 city inhabitants.

Analysis of the NPFs under Directive 2014/94/EU results in the following estimates of infrastructure investment needs by Member States, including the TEN-T core network corridors:

- **electricity**: up to EUR 904 million by 2020;
- **compressed natural gas** (CNG): up to EUR 357 million by 2020 and up to EUR 600 million by 2025 for road vehicles running on CNG;
- **liquefied natural gas** (LNG): up to EUR 257 million by 2025 for road vehicles operating on LNG. For LNG for waterborne transport, up to EUR 945 million in the TEN-T Core Network Corridor seaports by 2025 and up to EUR 1 billion in the TEN-T Core Network Corridor inland ports by 2030;
- **hydrogen**: up to EUR 707 million by 2025.

Overall, the analysis of the situation shows that the **NPFs combined do not add up to a conclusive picture** that provides the long-term market certainty that is needed.

By 6 November 2017, only 8 out of 25 NPFs fully meet the NPF requirements.

The actions proposed in the framework of the plan revolve around the following objectives:

Accelerate the completion and implementation of national policy frameworks: the Commission will support the exchange of information and mutual learning on the implementation of national policy

frameworks, starting in March 2018 with a group of experts, then from the end of autumn 2018 with annual policy conferences. It will consider how to best reflect priorities of NPFs in the allocation of EU project funding and in European Semester reporting.

Investment support: the Commission will organise **roadshows** in Member States starting in November 2017 to review in a comprehensive way the ambition of the NPFs and the investment needs for low and zero emission mobility as well as assess the opportunities offered by different EU funding and financial instruments.

As a result, an additional EU financial support of up to **EUR 800 million** from CEF and NER300 is being made available with this action plan for investments into alternative fuels infrastructure

Enabling actions in urban areas: many European cities and regions are frontrunners in the transition to low and zero emission mobility. The Commission will also look into and adapt, where feasible, funding for alternative fuels in urban nodes, including for fleet solutions, by the end of 2017.

Increasing consumer buy-in: users must be able to use the entire transport network in a simple and seamless way.

Greater collaboration between public and private actors is needed. This implies access to reliable and timely information on the location and availability of charging points or refuelling points. Interoperable and easy-to-use payment services will also have a major impact.

In the end all parts of the necessary infrastructure need to be digitally connected (i.e. remotely and in real time for charging stations).

Integrating electric vehicles into the electricity system: Member States should:

- adopt a legislative framework to fully meet demand and enable smart charging;
- encourage the deployment of charging points and pre-wiring of parking spaces in residential and non-residential buildings;
- ensure that smart charging technologies such as smart meters are rolled out and that already adopted and upcoming smart charging standards for electric vehicles are being applied.

Electro-mobility related needs will be taken into account in the context of Horizon 2020 programming as well as in the context of the Strategic Energy Technology Plan (SET-Plan) process and other stakeholder fora.

The Commission concluded that the assessment of NPFs under the Alternative Fuels Infrastructure Directive shows that there is a lot to learn from the positive experiences of some Member States.

Serious **cross-border and cross-sector collaboration** of all public and private stakeholders is needed. The lock-in of technologies and markets needs to be prevented. For markets to grow, alternative fuels infrastructures and their services need to be open, transparent and interoperable.

The Commission stands ready to support this process through both means of non-legislative and legislative action.