

**eMAP: electromobility – scenario based Market potential,
Assessment and Policy options**

September 2013

Summary of the eMAP project and status report

The project eMAP concentrates on the analysis and assessment of the market penetration of electric vehicles and its socio-economic impacts. In this process feasible deployment paths of electric vehicles are investigated for the time horizon until 2025-2030. This is done by a scenario based market model which specifies the demand potential and market supply of electromobility. The socio-economic impact of the deployment of electromobility is evaluated using different scenarios. Political support measures and strategies for electric vehicles are identified and their impact on the deployment path is analyzed and evaluated. In the end, recommendations for optimized political strategies are derived.

During the first phase of the project duration several prerequisites for the scenario modelling and evaluation of market penetration trends have been created. First of all, the drivers and challenges of the electrification of road transport have been identified. Besides the technological characteristics of electric vehicles, the current situation of electromobility in terms of initiatives and present market penetration has been analysed for the EU as well as the eMAP partner countries Finland, Poland and Germany. Based on these findings, the project's research questions and targets have been derived. In a second step, the methodological links between research needs, data collection, scenario modelling, assessment and policy evaluation have been set up.

Furthermore, an overview of the stakeholders of electromobility has been compiled by analysing the relevant vehicle markets in Europe, USA and Asia. Trans-national information about published scenarios and forecasts of the market development of the future vehicle fleet in individual passenger transport has been collected, analysed and clustered. Finally, a framework for key parameters of electromobility has been constructed using parameter categorisation as well as political goals.