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## Towards Market Leadership – Electric Mobility in Germany

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## Who we are

### *Germany Trade & Invest (GTAI)...*

- is the foreign trade and inward investment promotion agency of the Federal Republic of Germany.
- is promoted by the German Federal Ministry of Economics and Technology.
- supports foreign companies to establish successful business operations in Germany.
- offers investment consultancy and project management services free of charge.
- works in close partnership with the 120 German Chambers of Commerce Abroad (AHKs) worldwide as well as all 16 German federal states.

*...is your entry point into Germany's growing E-Mobility value chain!*



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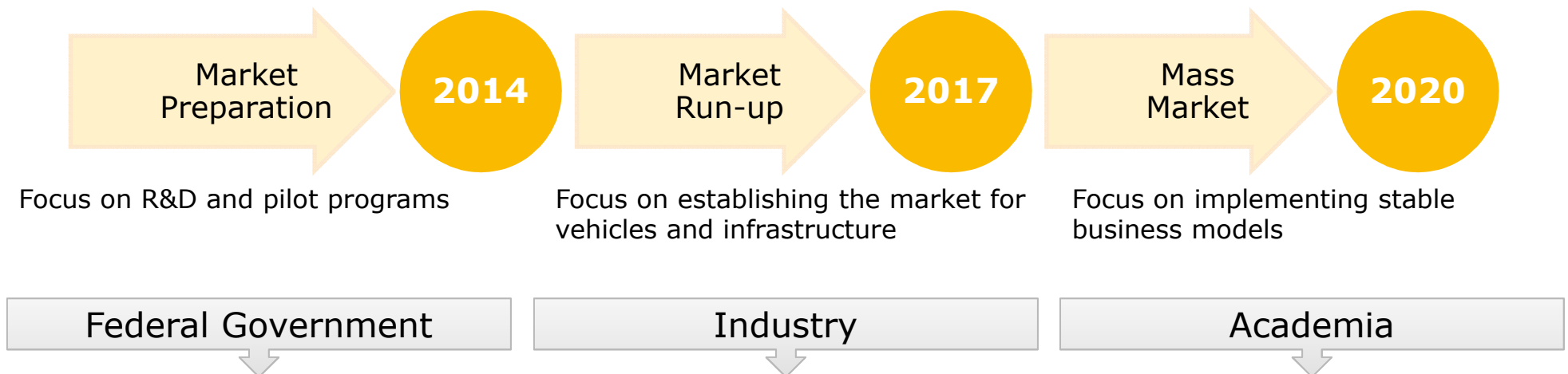
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Federal Ministry of Economics and Technology

## The German Government has initiated a National Electromobility Development Plan

Overall Objective: **1 million** EVs on the road by **2020** / **6 million** EVs by **2030**



### National Electric Mobility Platform (since 2010)

#### R&D Programs for Electric Mobility (>€1bn public funding until 2015)

- 8 Selected model/pilot regions for e-mobility
- Flagship projects in six key fields of e-mobility
- Large variety of industrial players and research organizations involved in project consortia

#### 4 Showcase Regions in Germany (€180m public funding until 2015)

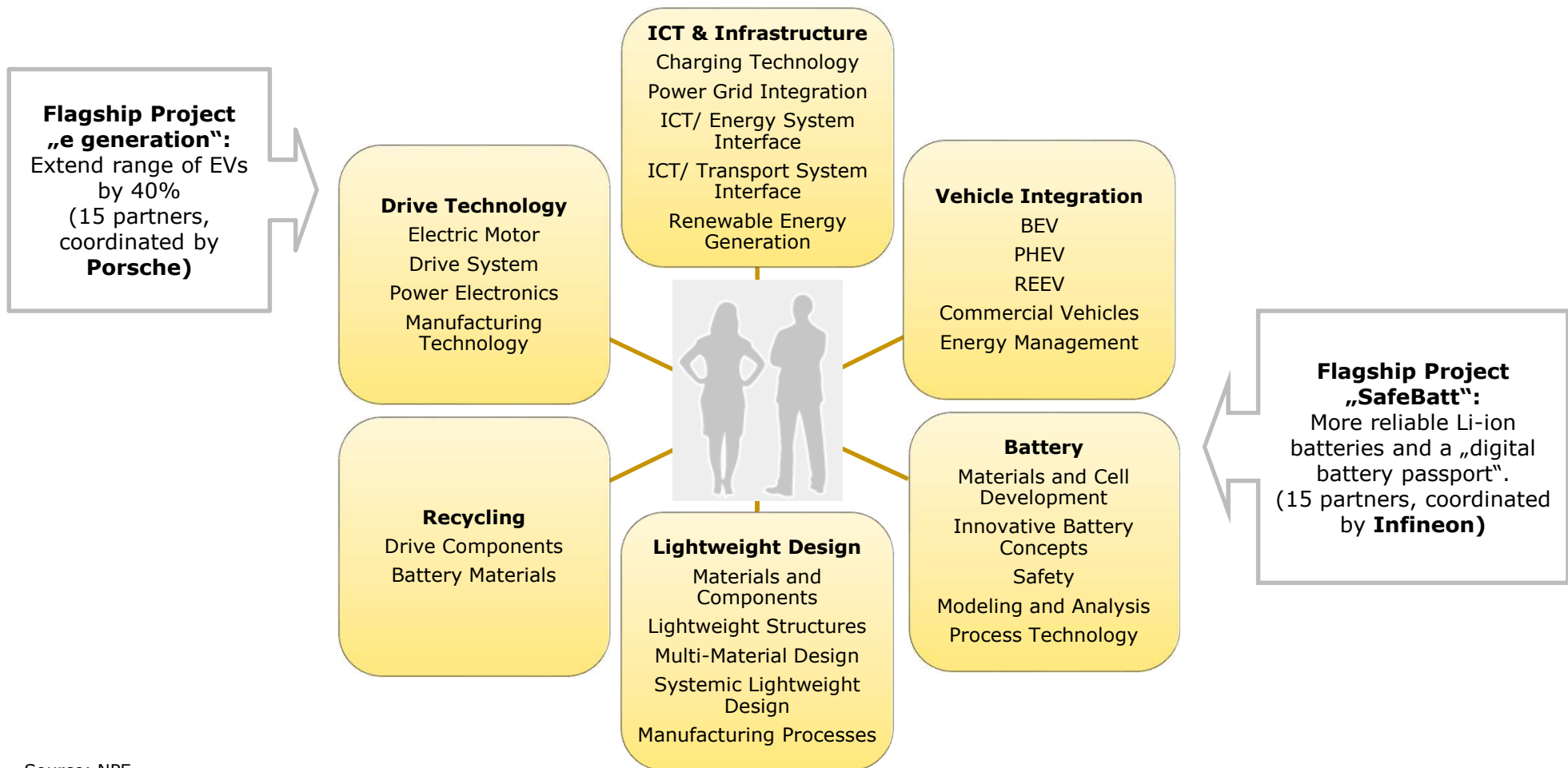
- Introduction of e-mobility to broader public: experience and demand creation
- Large-scale demonstration and pilot projects
- Integration of energy, vehicle and transport

Source: BMWi, BMVBS, BMU, BMBF

November 19, 2013

# Germany's E-Mobility Strategy – R&D Focus

A user-centric approach addresses the most relevant R&D topics for market preparation



Source: NPE

# Germany's E-Mobility Strategy – Industry

All German OEMs are launching serial production of HEVs/EVs

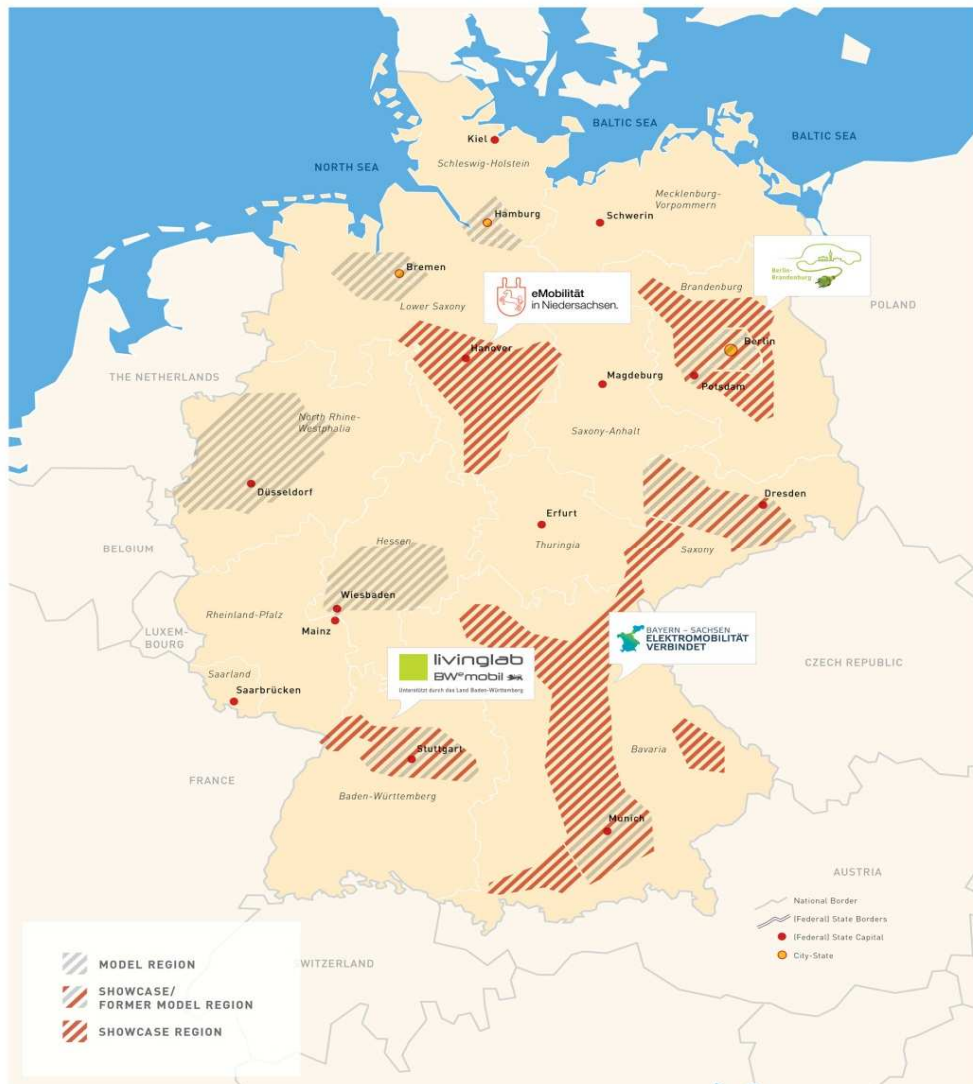


OEM	Model	Type	Start
<b>Audi</b>	A6	Hybrid	2012
	A3 e-tron	Hybrid/Plug-in	2014
<b>BMW</b>	Active Hybrid 3	Hybrid	2012
	Active Hybrid 5	Hybrid	2012
	Active Hybrid 7	Hybrid	2012
	i3	Electric/REEV	2013
	i8	Hybrid/Plug-in	2014
<b>Daimler</b>	A-Class E-Cell	Electric	2012
	B-Class E-Cell Plus	Electric	2014
	B-Class F-Cell	F-Cell/Electric	2014
	Vito E-Cell	Electric	2010
	E 300 BlueTEC	Hybrid	2012
	E 400 Hybrid	Hybrid	2012
	S 400 Hybrid	Hybrid	2012
	S 500 Hybrid	Hybrid/Plug-in	2013
	SLS AMG E-Cell	Electric	2013
	Smart fortwo Electric Drive	Electric	2012
<b>Opel</b>	Ampera	Electric/(REEV)	2012
<b>Porsche</b>	Panamera S E-Hybrid	Hybrid/Plug-in	2013
	Cayenne S Hybrid	Hybrid	2013
<b>Volkswagen</b>	e-Up!	Electric	2013
	Jetta Hybrid	Hybrid	2012
	Touareg Hybrid	Hybrid	2012
	XL1	Hybrid/Plug-in	2013



Source: GTAI research, November 2013

## Electric Mobility becomes a reality in Germany's four showcase regions



*Living Lab BW Electric Mobility*  
(Baden-Wuerttemberg)



*Electric Mobility Connects*  
(Bavaria/Saxony)



*International Showcase E-Mobility*  
(Berlin/Brandenburg)



*We're Switching to Electric Horsepower*  
(Lower Saxony)