

## EVALUATION ROADMAP

Roadmaps aim to inform citizens and stakeholders about the Commission's work to allow them to provide feedback and to participate effectively in future consultation activities. Citizens and stakeholders are in particular invited to provide views on the Commission's understanding of the problem and possible solutions and to share any relevant information that they may have.

<b>TITLE OF THE EVALUATION</b>	Evaluation of the Directive on the Deployment of Alternative Fuels Infrastructure
<b>LEAD DG – RESPONSIBLE UNIT</b>	DG MOVE B4 - Sustainable & intelligent transport
<b>INDICATIVE PLANNING (PLANNED START DATE AND COMPLETION DATE)</b>	Start Q1/2019-end Q2/2020
<b>ADDITIONAL INFORMATION</b>	<a href="https://eur-lex.europa.eu/legal-content/en/TXT/?uri=CELEX%3A32014L0094">https://eur-lex.europa.eu/legal-content/en/TXT/?uri=CELEX%3A32014L0094</a> <a href="http://www.eafo.eu">www.eafo.eu</a>

**The Roadmap is provided for information purposes only. It does not prejudice the final decision of the Commission on whether this initiative will be pursued or on its final content. All elements of the initiative described by the document, including its timing, are subject to change.**

### A. Context, purpose and scope of the evaluation

#### Context

##### Policy context:

The Long-Term Climate Strategy of the Commission shows how Europe can lead the way to a climate-neutral economy by 2050.<sup>1</sup> The promotion of low- and zero-emission vehicles running on alternative fuels is a key part of a system approach to the decarbonisation of our mobility system.

Directive 2014/94/EU on deployment of alternative fuels infrastructure creates a common framework of measures for deployment alternative fuels infrastructure in the EU. Building-up an infrastructure network for vehicles and vessels is meant to reduce oil dependence and mitigate environmental impacts of road transport, to develop a single market for alternative fuels infrastructure along urban areas and nodes and the core network of the Trans-European Transport Network. Having a commonly available infrastructure supported by a framework of measures is expected to support accelerated take up of alternative fuelled vehicles and vessels.

The Directive requires Member States to set up long-term National Policy Frameworks (NPFs) for the development of the market as concerns alternative fuels and the planning of the deployment of relevant alternative fuels infrastructure. It also stipulates requirements for rollout of alternative fuels infrastructure along the core network of the Trans-European Transport Network (TEN-T) and its urban nodes - with different milestones for 2020, 2025 and 2030 for different alternative fuels. The Directive sets common technical specifications for recharging and refuelling stations and for consumer information.<sup>2</sup>

The Action Plan on alternative fuels infrastructure of 8 November 2017 complements this policy framework with a set of supporting policy actions at EU level. These include additional financial support for infrastructure investments through the Connecting Europe Facility, outreach activities in Member States to explain policy objectives and financing opportunities or revised guidance for planning of alternative fuels infrastructure in urban areas.

Some Member States and several regional and local authorities have adopted or are planning to adopt ambitious strategies and policies for decarbonisation of mobility and transport, including plans to stop the sales of conventional vehicles (e.g. the Netherlands and Denmark in 2030, followed by France and UK in 2040).

##### Market development context

The overall market for alternative fuels infrastructure is still in its early stages, mainly due to the limited demand from overall vehicle fleets. Roll-out of infrastructure in many parts of the Union still depends on public support, including grants from the Connecting Europe Facility (CEF)<sup>3</sup>. Grants from the CEF are increasingly combined with loans or private sector financing under the so-called blending approach under the CEF. The Commission concluded in its assessment of national policy frameworks that the current alternative fuels infrastructure in place

<sup>1</sup> COM(2018) 773 final

<sup>2</sup> [https://ec.europa.eu/transport/themes/urban/cpt\\_en](https://ec.europa.eu/transport/themes/urban/cpt_en)

<sup>3</sup> <https://ec.europa.eu/inea/en/connecting-europe-facility/cef-transport>

matches well the demand of the current fleet of vehicles, albeit great differences exist between Member States and the uptake of alternative fuel vehicles has been lower than expected by many Member States.<sup>4</sup> Hence, in view of future developments and recent announcements made by car manufacturers, the planning at national level does not adequately reflect estimated developments in certain markets, particularly for battery-electric passenger vehicles and trucks powered by liquefied natural gas.

Most recently, automotive manufacturers have started to invest heavily in the development of battery-electric vehicles. They have announced ambitious sales targets for the middle of the next decade. Together with ambitious policies on vehicle sales at national level and in the context of the recent agreement between Council and Parliament on the next long-term CO<sub>2</sub> emission performance targets, demand for alternative fuels infrastructure is likely to surge post 2020.

In this context, questions of interoperability and market design arise. Moreover, the emergence and spread of urban vehicle access restrictions as well as electricity market redesign, including smart electricity grid management, point to the specific characteristics and needs of rolling out alternative fuels infrastructure in urban and suburban areas, which warrant additional policy attention.

Specifically for electromobility, new actors such as mobility service providers have developed new services, leading to an increased need for interoperability - and a risk of stranded/ isolated solutions.

The European Parliament has called upon the Commission to bring forward a revision of the Directive in its October 2018 plenary.<sup>5</sup> The Graz Declaration of the Informal Environment and Transport Council on 30 October 2018 reiterates the need for stepping up policy actions to accelerate the market introduction of low- and zero-emission vehicles, including the development of appropriate charging infrastructure.<sup>6</sup>

### **Purpose and scope**

The Directive requires the Commission to assess the effects of its implementation (Articles 10(3) and 10(5)).

The evaluation will assess the implementation and effectiveness of Directive 2014/94/EU 5 years after its adoption. The exercise should examine whether the Directive and its specific measures have been effective and appropriate to deliver on its key objectives and should assess the direct contribution of actions taken by relevant actors and their impacts. It should assess to what extent the technical specifications developed under the Directive are fit for purpose in view of relevant technological and market developments.

The evaluation should clarify whether projected results of the current implementation practice are sufficient to deliver on the needs of a functioning internal market for alternative fuels and infrastructure and on the estimated needs to contribute to reducing the dependence on oil and to the overall mitigation of environmental impacts.

In line with the Better Regulation guidelines<sup>7</sup> this evaluation shall cover:

- the overall effectiveness, i.e. assess the actual changes the Directive has generated, particularly in view of its original objectives;
- the efficiency, i.e. assess the actual costs<sup>8</sup> relative to the actual benefits of the implementation, and whether there is potential for simplification and increasing cost-efficiency ;
- the relevance, i.e. assess whether the overall problem analysis and related objectives are still adequate and how the policy context has evolved. Here, a key point is to understand whether its scope is still fit for purpose; whether the framework is fit for post-2020 market developments and challenges and can effectively contribute to delivering on the long-term decarbonisation of transport;
- EU added value, i.e. the added value delivered by the Directive, beyond what reasonably could have been achieved by national and regional policies;
- coherence of the regulatory framework, both in terms of the internal coherence of the Directive and the coherence of its provisions with other key legislation and policy initiatives at EU level<sup>9</sup>, accounting also for interlinkages with relevant financing instruments at EU level.<sup>10</sup>

The outcomes of this evaluation will inform the decision about a possible revision of the current Directive under the next Commission. It should provide recommendations and inform any further development of alternative fuels

<sup>4</sup> <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52017SC0365>

<sup>5</sup> <http://www.europarl.europa.eu/sides/getDoc.do?pubRef=-//EP//TEXT+TA+P8-TA-2018-0438+0+DOC+XML+V0//EN&language=EN>

<sup>6</sup> <https://www.eu2018.at/latest-news/news/10-30-Graz-Declaration.html>

<sup>7</sup> <https://ec.europa.eu/info/sites/info/files/better-regulation-guidelines.pdf>

<sup>8</sup> Building on the work carried out for the assessment of national policy frameworks, SWD/2017/0365 final

<sup>9</sup> For instance, regulations on CO<sub>2</sub> emission performance standards for light- and heavy-duty vehicles, for procurement of clean vehicles, TEN-T network implementation, implementation of intelligent transport systems or promotion of sustainable urban mobility as well as EU batteries action plan and the related EU batteries alliance initiative.

<sup>10</sup> Particularly the Connecting Europe Facility (CEF), FP7 and Horizon 2020, European Structural and Investment Funds (ESIF), European Strategic Fund for Investment (EFSI).

infrastructure policy at EU level.

## B. Better regulation

### Consultation of citizens and stakeholders

A public consultation (12 weeks, internet-based) will be launched during Q2 of 2019 that will be available in EN, FR and DE language on the dedicated Commission website<sup>11</sup>.

Targeted stakeholder consultations will complement the public consultation.

The consultation activities will target key actors, including infrastructure users, such as public authorities, transport operators, automotive manufacturers, infrastructure operators, mobility service providers, grid operators, consumer interest and citizens' organisations, standardisation bodies etc.

A stakeholder workshop to inform about the outcomes of the public consultation is planned. Moreover, the Sustainable Transport Forum established by the Commission will facilitate targeted exchange of information with key stakeholders.

The Commission will publish a synopsis report on the outcomes of all consultation activities.

### Data collection and methodology

The evaluation will draw on different sources of existing data and information:

- assessment by the Commission of the National Policy Frameworks;
- European Alternative Fuels Observatory<sup>12</sup>;
- Reports and findings of the Sustainable Transport Forum;
- Partial results of the implementation of the Programme Support Actions from the Connecting Europe Facility;
- Data and reports from the Innovation and Networks Executive Agency implementing the grants related to the "innovation priority" of the calls for proposals of the Connecting Europe Facility;
- Information on the implementation of the Cleaner Transport Facility financed from the European Investment Bank and resources from the Connecting Europe Facility, promoting clean transport;
- Partial results of the evaluation of the urban mobility package and of the Trans-European Transport Network Regulation, running in parallel<sup>13</sup>.

It will use data and information gathered from the Commission's assessment of the national policy frameworks and the implementation reports of Member States under the Directive.

It will further gather information through a complementary external evaluation study, particularly to analyse implementation and understand market developments in Member States since 2014. The Commission will in this context make efforts to gather specific quantitative information from Member State authorities and relevant stakeholders.

<sup>11</sup> [https://ec.europa.eu/info/law/better-regulation/have-your-say\\_en](https://ec.europa.eu/info/law/better-regulation/have-your-say_en)

<sup>12</sup> <https://www.eafo.eu/>

<sup>13</sup> [https://ec.europa.eu/info/law/better-regulation/initiatives/ares-2018-1023988\\_en](https://ec.europa.eu/info/law/better-regulation/initiatives/ares-2018-1023988_en)