

# eMAP

## ELECTROMOBILITY - SCENARIO BASED MARKET POTENTIAL, ASSESSMENT AND POLICY OPTIONS

[www.project-emap.eu](http://www.project-emap.eu)

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 analysed and evaluated. In the end, recommendations for optimised 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. 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 final evaluation of market penetration and impacts of electromobility has been constructed using

### PROJECT DATA

Funding/€	Total cost/€	Duration
1.220.359	1.240.384	33 months

Partners	Federal Highway Research Institute, DE German Aerospace Center, DE VTT Technical Research Centre of Finland, FI Motor Transport Institute in Warsaw, PL
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parameter categorisation for the key parameters of electromobility, as well as political goals.

To learn about consumers' awareness of electric drives and their willingness to use and buy these cars, a consumer survey was designed. A total of 6 000 online interviews were conducted in the European Union, focussing on eMAP partner countries. Survey results are currently analysed and will be published in early 2014. Besides socio-economic and car related background information on the consumer, the survey captures attitudes towards electromobility. Other topics are the decision making process in the car purchase and the impact of policies and other measures on the purchase decision.

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