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"ROLLL OUT OF ELECTRIC VEHICLE CHARGING POINTS IN GREECE"
HELPING KICK-START THE MARKET
AGENDA

- Overview of e-mobility in Greece – from zero to a market
- What were JASPERS asked to support us with
- Outcomes of JASPERS work
- Moving on to implementation
- Key lessons learnt from collaboration with the support team
E-mobility in Greece
Uptake of EVs

Monthly EV registrations and their market share

- Battery Electric Vehicles (BEVs)
- Plug-in hybrid Electric Vehicles (PHEVs)
- EV regs market share
E-mobility in Greece
Publicly accessible charging points

Installed publicly accessible charge points in Greece

- 3kW - 22kW AC
- 50kW - 100kW DC
- > 100kW DC

<table>
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<th>Year</th>
<th>3kW - 22kW AC</th>
<th>50kW - 100kW DC</th>
<th>&gt; 100kW DC</th>
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Main scope items

Review existing market-driven EV infrastructure provision in Greece
- Analyse current market data and create user segmentation
- Undertake a market consultation

Develop different scenarios for EV uptake
- Create take-up curves that reflect the high level policy considerations

Create projections of the public infrastructure needed to support EV uptake scenarios
- Define the scale (number of chargers, type and cost) of the investment in EV charging that might be required
- Translate this into short, medium and long-term targets per charging segment

Propose suitable business models for the rollout of chargers

Support on project preparation (tender documentation)
Outcomes

Key findings from current market analysis

- Significant lack of publicly accessible charge points, especially high-power ones
- Countrywide coverage is patchy
- Most charge points are privately-deployed

Split of public chargepoints in Greece by location type:

- Supermarket: 40.4%
- Destination: 23.9%
- Hotel: 8.1%
- Fuel Station: 6.3%
- Car park: 6.3%
- On-street/roadside: 5.8%
- Transport hub: 5.8%
- Workplace: 2.1%
- Medical Centre: 1.1%
- Unspecified: 0.4%
Outcomes

Key findings from current market analysis
Outcomes

EV uptake scenarios

EV uptake is the major input into infrastructure projections

Plug-in vehicles park is expected to expand rapidly

BEV car uptake curves

- NECP
- 2030 ban
- BEV car uptake S-curve
- BEV car uptake C-curve
Outcomes

Projections for required charge points to 2030

Correspondingly, the publicly accessible charging network will need to expand rapidly.

Under the most ambitious/optimistic scenario (“2030 ban”) → up to 100,000 charging sockets may be required by 2030.

Cumulative total capital cost for charging infrastructure → up to 900 million Euros by 2030 under the same scenario.
OUTCOMES

Proposed deployment models

JASPERS recommendations on deployment measures/mechanisms:

1. Design and implement a Concession Model to deliver on-street residential charge points within Local Authorities’ territories

And in parallel

2. Launch a nationwide Grant Scheme for High Power Charge points
OUTCOMES

Moving to implementation

- Developed terms sheet for *concession contracts* with European PPP Expertise Centre of EIB
- Utilised PASSA support mechanism to *create template* Concession Contracts for implementing Municipal Charging Plans*
- Moving on to prepare couple of “pilot” concession tenders in order to dry-run the concessions model
- Currently preparing an RRF funded *grant scheme* to support deployment of high power charging infrastructure across the country

* All Greek Municipalities have conducted local Charging Plans → >12000 on-street residential charge points sited already
Key lessons learnt

From scoping & implementing a Jaspers support project

- Active engagement by beneficiary and continuous collaboration with JASPERS team
- Thorough understanding of the relevant market’s structure and status, by JASPERS team
- Engaging with stakeholders, at all levels of public administration, throughout the project

→ Help increase the relevance and applicability of project outcomes
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Thank you!

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