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Enabling the Energy Union



CENTER FOR
THE STUDY OF
DEMOCRACY

Governance barriers regarding electrification of vehicles in nine European countries

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Low-carbon mobility and its challenges to energy transition policies in Europe

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- ❑ To identify the key factors of energy choices in three areas: **transport, heating and cooling, and electricity.**
- ❑ To better grasp the interactions between individual and collective energy choices and the regulatory, technological and investment prerequisites of the Energy Union.
- ❑ To look at the **social acceptability** of energy transitions.
- ❑ To increase the knowledge of **governance and social mobilisation practices** that encourage collective energy choices in line with the Energy Union objectives.
- ❑ To provide **strategic policy recommendations.**

- ❑ Coverage: 9 countries:
 - 3 non-EU (Norway, Serbia and Ukraine)
 - 6 EU (Germany, UK, Poland, Hungary, Bulgaria, France)

- ❑ Research methods: qualitative and quantitative (survey of households, in-depth interviews, focus-groups, desk research, analysis of documents)

- ❑ Coverage of country case studies:
 - **Electrification of vehicles**
 - Bioenergy and biofuels
 - Wind, Solar and Smart-Grid Power Network
 - Energy efficiency

Desired priorities of the national energy policies

	Development of clean energy sources, e.g. RES	Price of energy, socially acceptable and affordable for all people	Energy efficiency of private and public buildings	Power, gas and heating prices should be regulated by the government consistent with the living standards in the country	Power markets should be fully liberalized, so that energy prices are dependent only on the market	Phasing-out nuclear power plants (if any)
Bulgaria	29.8%	82.6%	44.0%	58.3%	18.0%	6.6%
France	56.5%	54.3%	38.7%	47.5%	14.4%	28.4%
Germany	60.9%	95.3%	33.9%	26.0%	N.A.*	N.A.*
Hungary	44.0%	53.5%	25.7%	50.5%	16.1%	14.2%
Poland	49.0%	73.2%	42.2%	60.7%	14.9%	N.A.*
Serbia	40.7%	69.3%	29.0%	63.0%	22.6%	N.A.*
Ukraine	50.1%	75.8%	34.7%	62.0%	19.1%	21.5%
United Kingdom	64.8%	74.8%	54.0%	51.8%	15.9%	23.9%
Average	49.5%	72.3%	37.8%	52.5%	17.3%	18.9%

* N.A. = not asked

Source: Nationally representative survey of households, ENABLE.EU project, Oct 2017 – Feb 2018

Strengths:

- Industry-led / strong R&D capacity

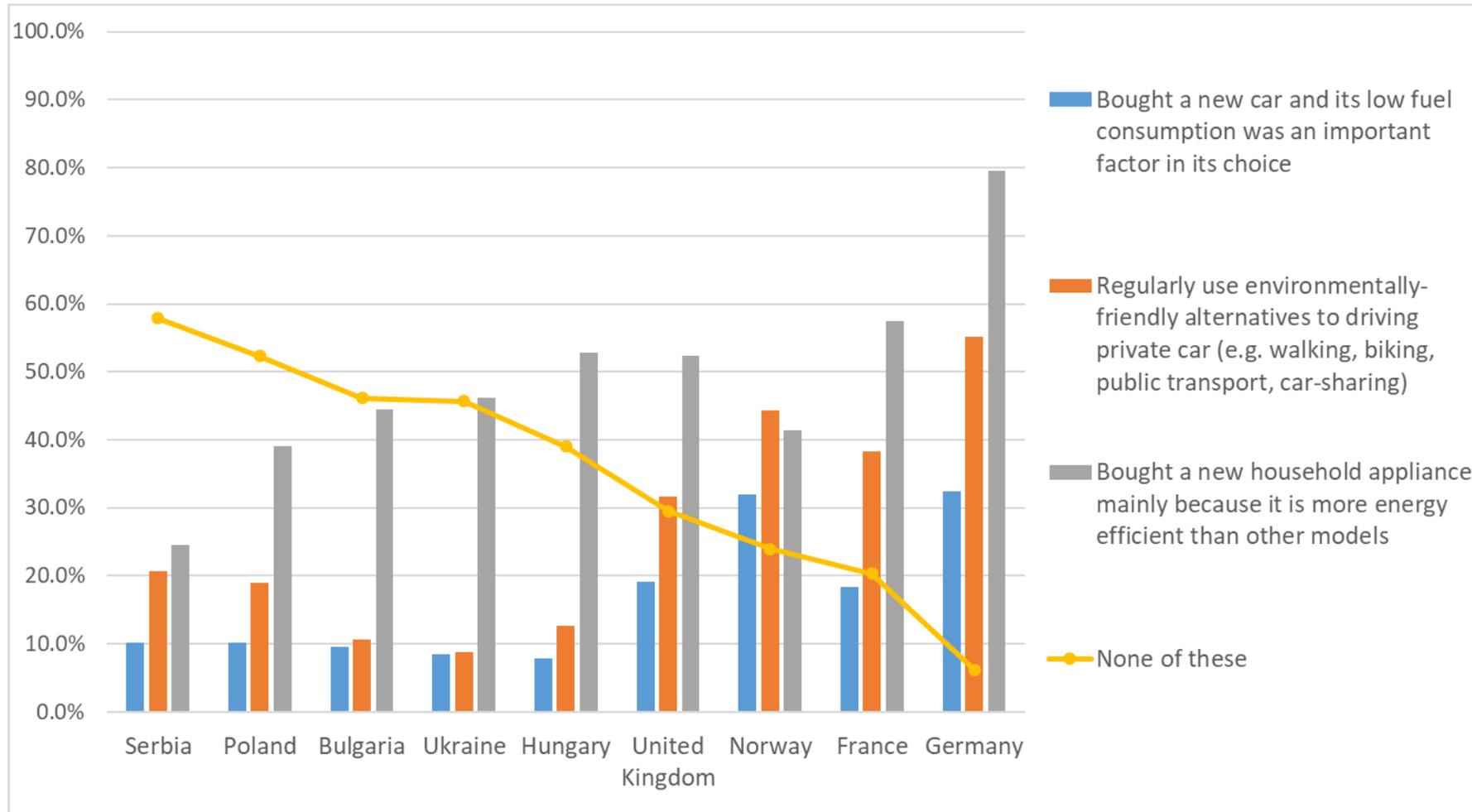
Weaknesses:

- Insufficient political commitment and policy coordination
 - ✓ Often lack of clear policy and goals at national level despite the EU priorities
 - ✓ Unlike RES (solar and wind) e-mobility has not received high public attention and political commitment on national level, and usually remains only a sectoral policy
 - ✓ Lack of or insufficient legislation development
 - ✓ Insufficient human and financial resources in responsible state authorities (regional / local level);
- Policy subsidiarity, i.e. dependent on the development of other low-carbon policies (RES, bio-fuels, EE, energy poverty, etc.)
- Affordability issue

(Un)expected results

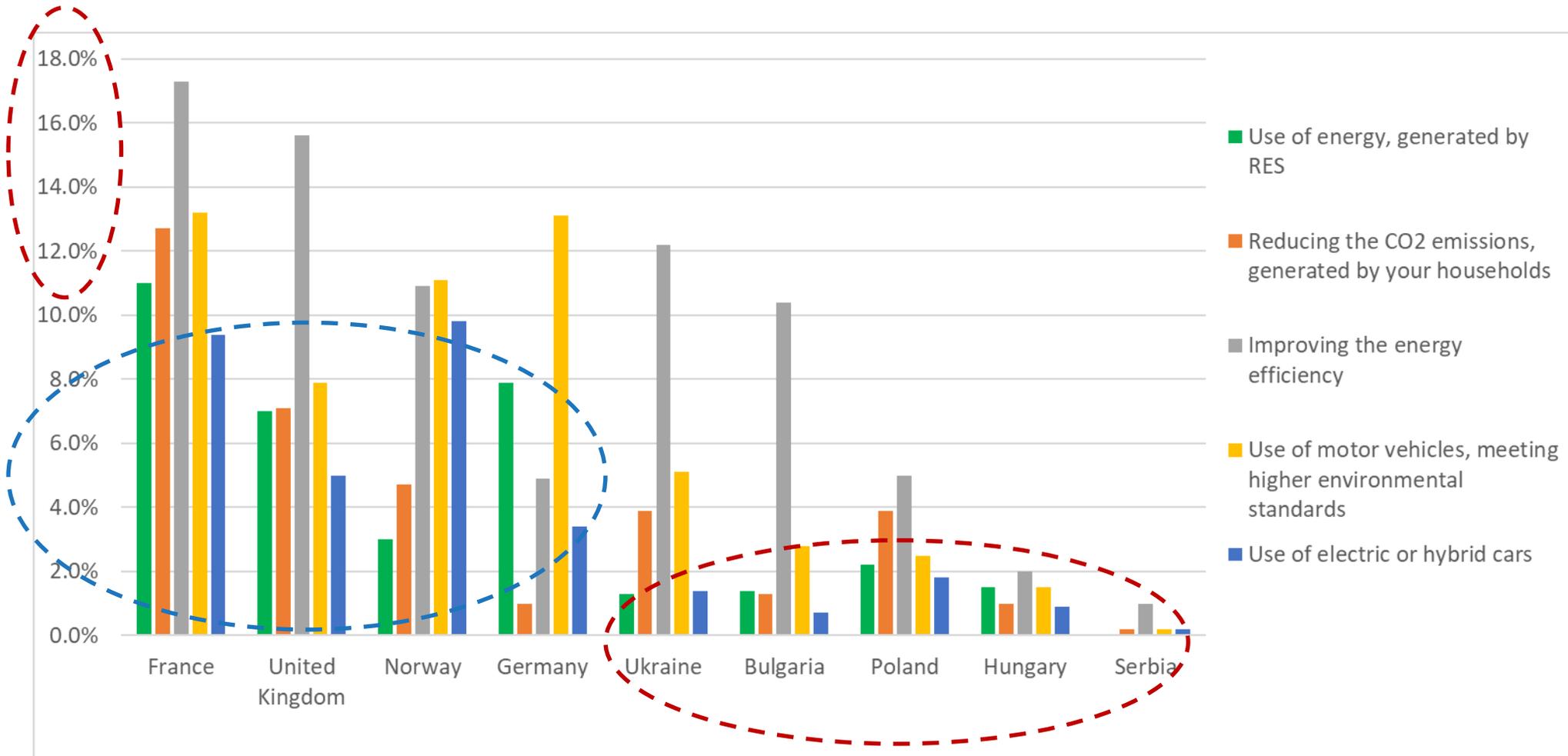
- Policy-takers vs Policy-makers
- Energy transition = wind and solar energy and (still) not e-mobility
- Incentives and drivers for shift in individual behaviors are largely missing
- Energy transition “on two speeds”

Individual choices



Source: Nationally representative survey of households, ENABLE.EU project, Oct 2017 – Feb 2018

Use of public funded programs, subsidies or financial incentives for implementing measures in the households over the last 3 years



Source: Nationally representative survey of households, ENABLE.EU project, Oct 2017 – Feb 2018

- ❑ Secure **long-term political, financial and social commitments** and synergy across the various policy areas:
 - ✓ **Overcoming the EU-centered design** of e-mobility policies
 - ✓ **Overcoming the “stop-and-go”** approach in national and regional policies
 - ✓ **Overcoming the discrepancy between the top-down approach** of the general policy-making and the **bottom-up (industry-led) characteristic** of transition policies related to e-mobility
- ❑ Ensure permanent **development and improvement of human resources** in the administration;
- ❑ Ensure **affordability** of energy transition policies to be in the focus of decision-making;
- ❑ Ensure better involvement of **R&D and technological development** in universities and develop required curricula in educational system;

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