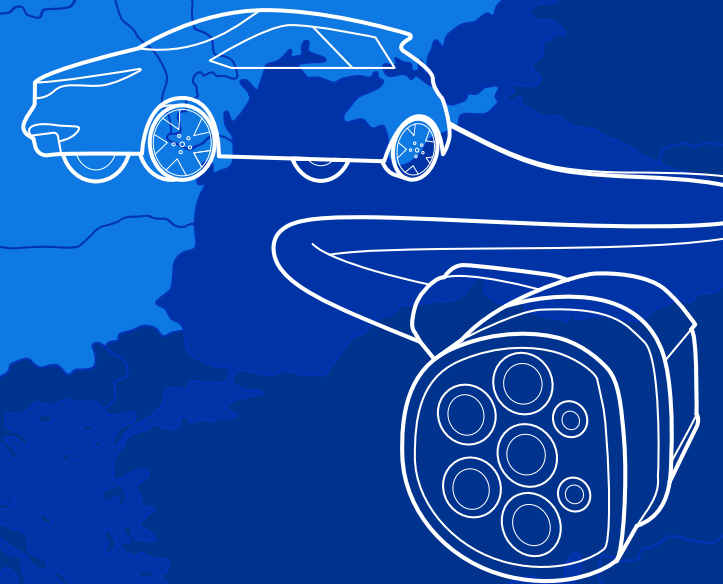


# E-Mobility: An Opportunity for Central-Eastern Europe



The largest economic organization  
creating the new mobility market  
in Poland and the CEE region

**270+**

associated companies –  
PSNM Members, leaders of  
sustainable transport in Poland

**100+**

institutional  
Partners

**500**

published reports,  
opinions and topic  
analyses

**400**

trainings and  
industry events

**2016**

Year of establishment

**28**

completed research  
and pilot projects

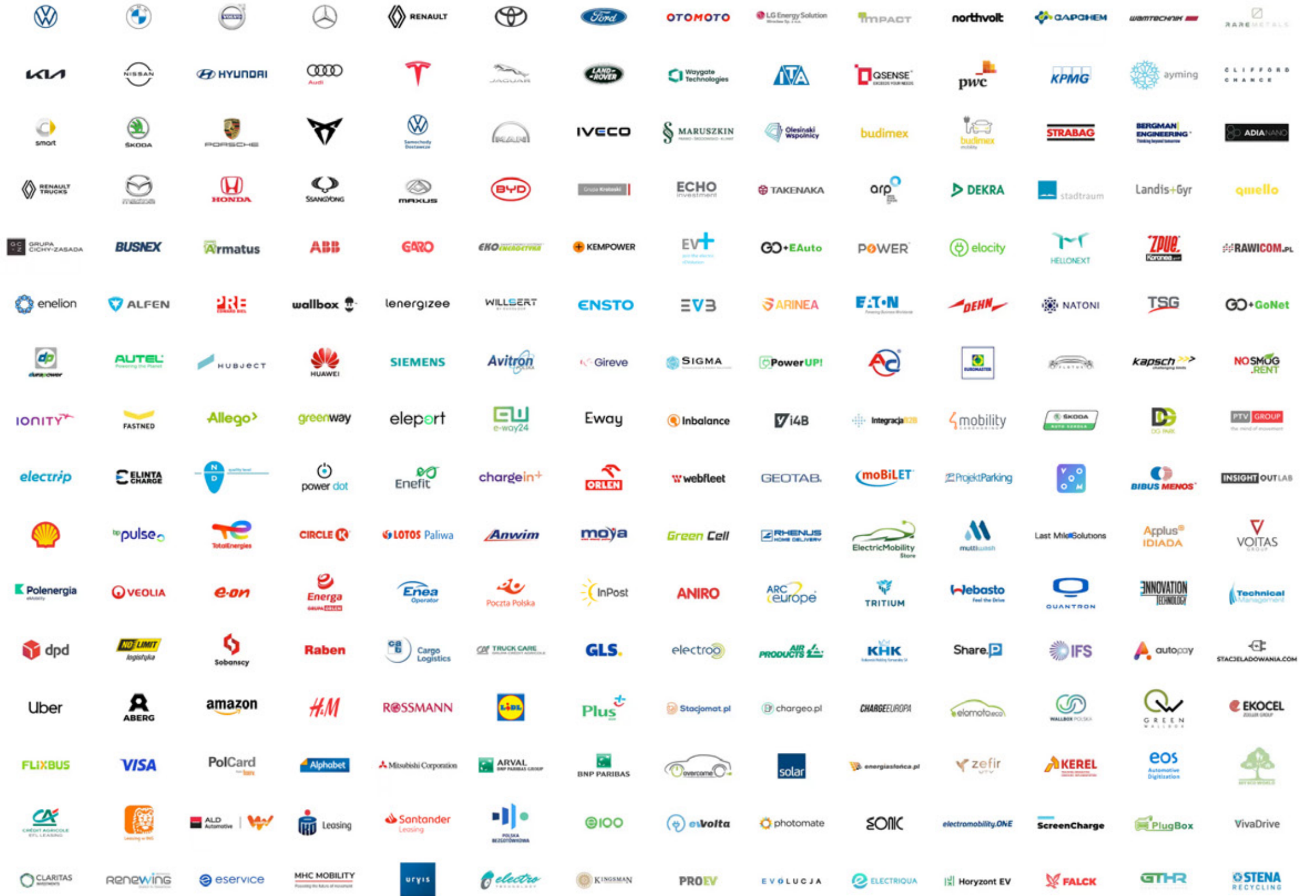
**500<sub>k</sub>**

parameters  
in databases

**1.8 million**

medium reach of media  
publications based on PSNM  
announcements

# PSNM Members



# PSNM | Our structure



The European Association for Electromobility

## PSNM OFFICES

**psnm**  
RESEARCH&ANALYSIS  
CENTER  
Reports and analyzes

**psnm**  
LEGISLATIVE  
CENTER  
Monitoring and advocacy

**psnm**  
COMPETENCE  
CENTER  
Training and consulting

**psnm**  
INFORMATION  
CENTER  
Education and promotion

## PSNM CONTENT COMMITTEES

Automotive Committee

Public Infrastructure Operators Committee

Local Government Committee

Battery Committee

Logistics and Transport Committee

Financial Institutions Committee

Producers and Installers of Charging Stations Committee

New Mobility Committee

Sustainable Transport Committee

Hydrogen Technologies Committee

## PSNM BRANDS

**KNM** Kongres Nowej Mobilności  
New Mobility Congress

**EV EXPERIENCE**

**elektromobilni.pl**

**EV klub POLSKA**

**CEE GTI**  
Central & Eastern Europe Green Transport Initiative

**Polish EV Outlook**

**Nowa Mobilność**  
STUDIUM PODPOLOWE  
Współpraca: Ministerstwo Klimatu i Środowiska, PKN, PGE

**psnm | Akademia**

EUROPEAN BATTERY ALLIANCE | **EBA250 POLSKA**

**LIDER**  
ELEKTROMOBILNOŚCI

## PSNM PROJECTS

**eHDV Infrastructure Lab**

**EKGLOG**  
EKOLOGICZNA LOGISTYKA

**ELAB**  
Miasto Czystego Transportu  
Projekt badawczy

**MISJA ZEROWA EMISJA**

**FLOTA**  
Z ENERGIA

**ELEKTROMOBILNOŚĆ W PRAKTYCE**  
Osiągnięcia wdrożenia 1000

**Barometr Nowej Mobilności**

**KATALOG POJAZDÓW ELEKTRYCZNYCH**

LICZNIK ELEKTROMOBILNOŚCI

**elektromobilni.pl**  
Mapa elektromobilności

**AUTOSTRADA DO ELEKTROMOBILNOŚCI**

**Biała Księga Nowej Mobilności**

**emobility media awards**

**ZERO RACE**

**EV DRIVERS' CHOICE GEA AWARDS**

**Global e-Mobility Forum**  
DRIVERS' CHOICE CHANGE YOUR TRIP  
global@emobilityforum.com

**ATLAS ELEKTROMOBILNOŚCI**

**Każda podróż ma znaczenie.pl**

**CEE CITIES CENTER**

**mobility city**

**EVerywoman**

**Interreg Baltic Sea Region** Co-funded by the European Union  
SMART GREEN MOBILITY  
HyTruck



# PSNM | Selected initiatives and partnerships



## Development of charging infrastructure in Poland

Development of the optimal location of charging infrastructure for light and heavy goods vehicles along roads in the TEN-T core network (AFIR).



## Development of e-mobility market in the CEE region

Equalizing the pace of development of zero-emission transport in the region, as part of establishing the initiative and cooperation of entities from Central and Eastern Europe.



## Development of eHDV market in Poland

Electrification of heavy road transport as part of the project to launch the first in Poland, pilot network of charging stations for electric trucks.



## Development of battery sector in Poland

Stimulating the development of EV battery industry in Poland as part of raising competences on the labor market (academy) and the integration and cooperation of key entities in industry projects.



## Development of Clean Transport Zones in Poland

Accelerating the pace of implementing low-emission zones in cities as part of the comprehensive substantive and organizational support for local government units in Poland.

# PSNM | Selected initiatives and partnerships



## Development of electric vehicles fire safety area

Development of guidelines for the fire protection of garages and the safe operation of EVs, stations and charging points in Poland.



## Development of human resources and a response to the labor market needs in the automotive sector

Launching a new field of study at the Warsaw University of Technology, increasing competences in the field of e-mobility and sustainable transport.



## Development and growing importance of the EV user community in Poland

Support for the largest movement of electric car users in Poland – subsidies and cooperation with the EV Klub Polska Foundation.



## Development of the charging infrastructure interoperability in Poland

Development of a domestic roaming concept for the e-mobility market in Poland. Striving to integrate the services of individual CPOs.

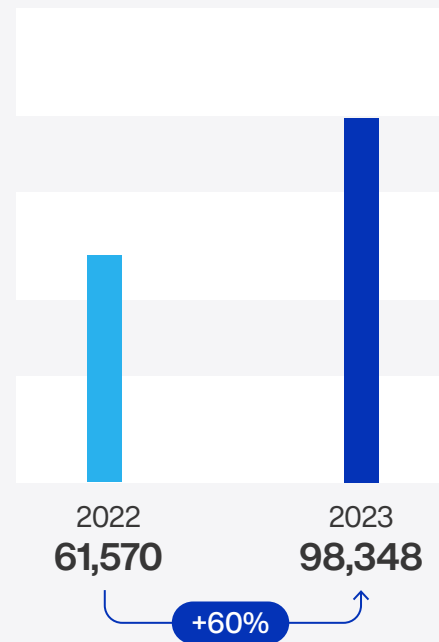


## Development of sustainable, zero-emission forms of urban mobility

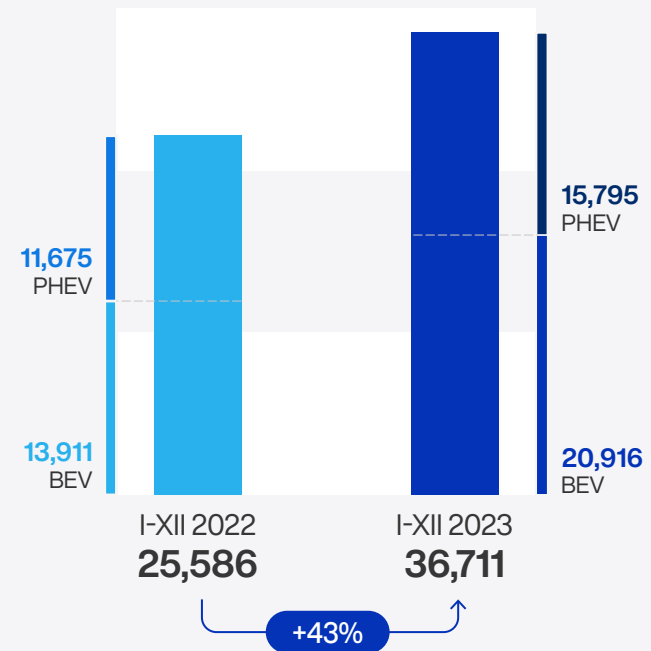
Development of a strategy for creating an integrated transport ecosystem in Poland for cities of the future, based on the most effective and ecological forms of travel.

# Polish e-mobility in numbers

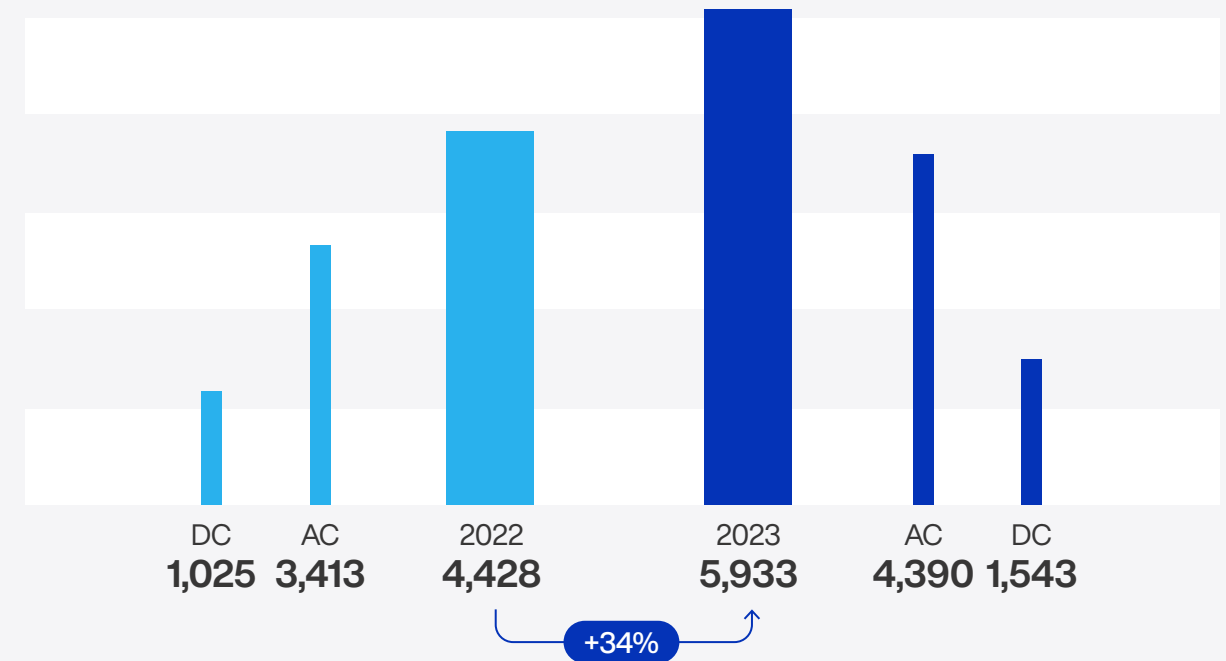
## NUMBER OF ELECTRIC PASSENGER CARS (BEV + PHEV)



## NUMBER OF NEWLY REGISTERED ELECTRIC PASSENGER CARS (NEW AND USED)



## NUMBER OF PUBLIC CHARGING POINTS



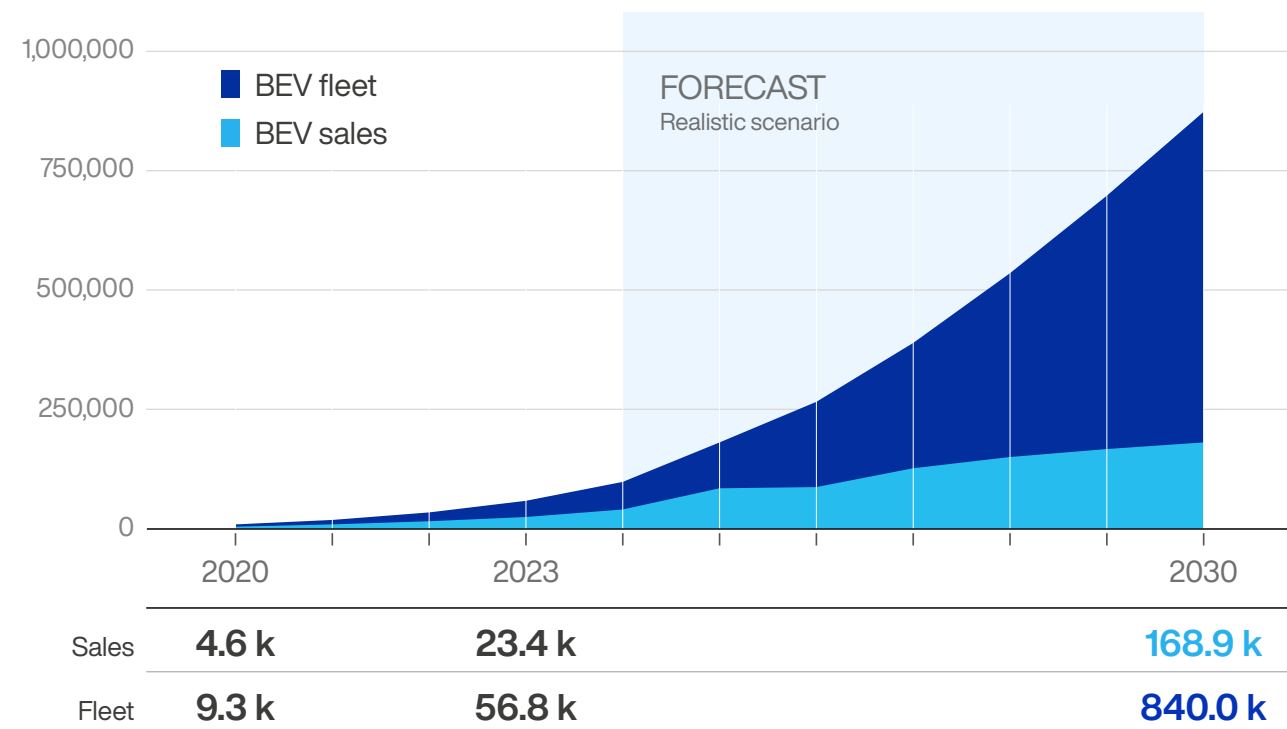


# Polish e-mobility: near future

## Forecast for the development of e-mobility in Poland

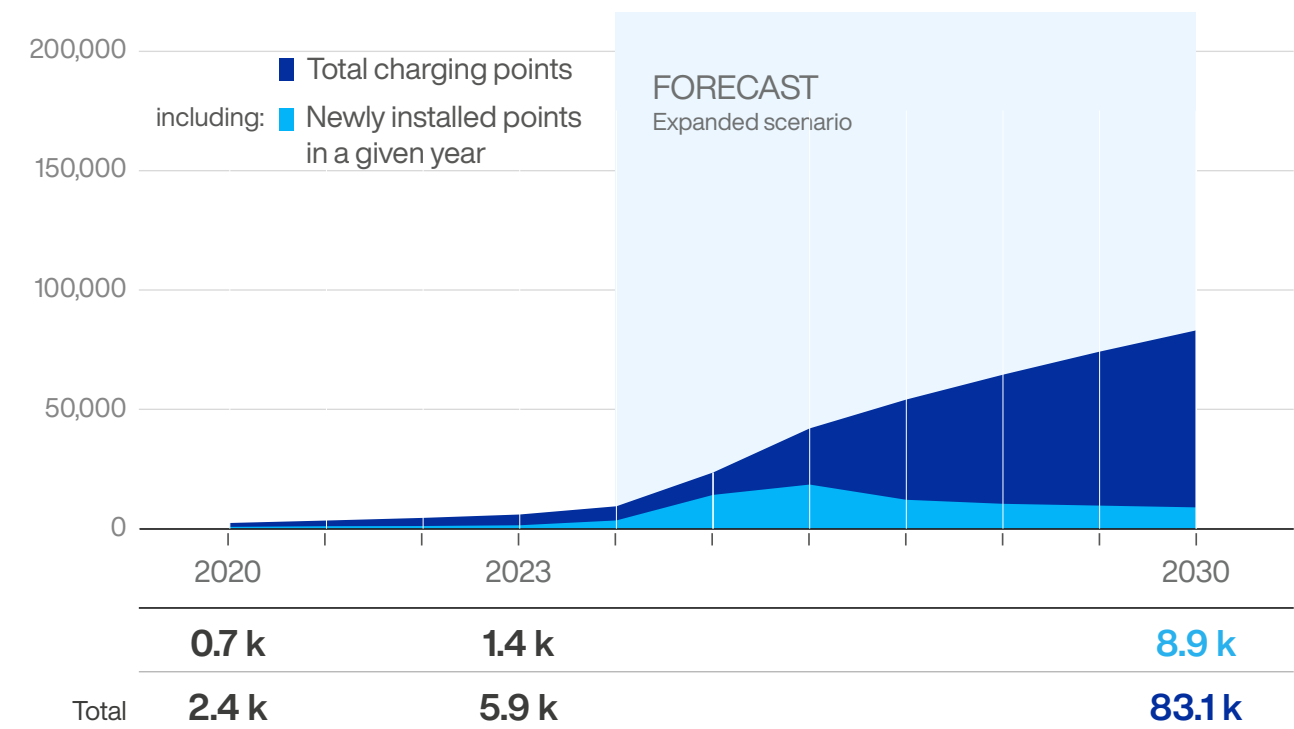
### Electric vehicle fleet in Poland (passenger cars and vans)

**BEV** 2020-2030



### Network of charging points in public stations in Poland

**AC + DC** 2020-2030





# Case Studies

## Success stories

## Act on electromobility and alternative fuels

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Entered into force: **22 February 2018**

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### Basic legal act regulating the functioning of the sustainable transport market in Poland

- Contains the basic definitions related to electric vehicles and charging infrastructure
- Defines the rules for establishing clean transport zones
- Imposes obligations on government administration bodies and local government units in the field of fleet electrification
- Imposes obligations on local government units with regard to the development of publicly available charging infrastructure
- Introduces a catalog of benefits for buyers and users of zero-emission vehicles

## Amendment to the Act on electromobility and alternative fuels

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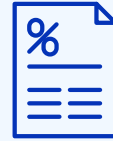
Entered into force: **24 December 2021**

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- Introduction of a dedicated procedure for the installation of charging stations in multi-family buildings
- Implementation of Directive 2018.844, imposing the obligation to prepare buildings for the installation of charging stations
- Introducing provisions that simplify electric grid connection procedures
- The basis for introducing the provisions on granting by the President of the Office of Technical Inspection (UDT) individual identification codes in the Register of Alternative Fuels Infrastructure (EIPA)

# The zero-emission transport market support system resulting from the Act

## Excise duty



Till 31/12/2029

- 1. Exemption of PHEVs**  
(with combustion engine capacity up to 2000 cm<sup>3</sup>)
- 2. Exemption of BEVs and hydrogen-powered vehicles**

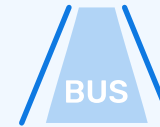
Without time limit

## PIT / CIT



Wear and tear allowance with regard to a passenger car being a **BEV** is the tax deductible expense up to a value not exceeding **PLN 225,000** (ca. EUR 47,275) – other vehicles up to **PLN 150,000** (ca. EUR 32,499)

## Bus lanes



Till 1/01/2026

**BEVs and FCEVs are allowed to drive in bus lanes**

The road manager may make the use of bus lanes by BEVs and FCEVs dependent on the number of people in the vehicle

## Parking



**BEVs are exempted from parking fees on public roads in metered parking zones**

**Road manager**

- 1.** Designates parking spaces at publicly accessible charging stations – BEVs and PHEVs can use these places only when charging
- 2.** Can designate parking spaces for BEVs, PHEVs and CNG/LNG-powered vehicles also outside publicly available charging stations to promote alternative fuel vehicles

## Clean Transport Zones



Municipal councils may establish a **clean transport zone**

**Unlimited entry**

**1. Under the Act**

BEVs, hydrogen-powered vehicles, CNG/LNG-powered vehicles, school and zero emission buses, National Revenue Administration, Military Intelligence Service, Central Anticorruption Bureau, Road Transport Inspection, Internal Security Agency, police, State Protection Service, Polish Armed Forces, rescue services, Prison Service, Polish Border Guard, Chancellery of the Prime Minister of Poland, Military Counterintelligence Service, Foreign Intelligence Agency, fire services, road authorities

**2. Under a Municipal Council resolution**

- a)** Exemption from restrictions for vehicles not provided for by law
- b)** Admission of vehicles other than those exempted pursuant to an act or resolution. Only:
  - **for 3 years** from the date of adoption of the resolution
  - **for a fee**

**Limited entry**

- 1.** Vehicles unauthorized under the Act
- 2.** Vehicles unauthorized under the resolution
- 3.** Vehicles unadmitted under the resolution

# Green license plates

As of 1 January 2020, battery-electric (BEV) and hydrogen (FCEV) vehicles in Poland receive green license plates to help identify a zero-emission vehicle on the road

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## Legal basis

- Regulation of the Minister of Infrastructure of 8 July 2019 amending the regulation on the registration and marking of vehicles and requirements for registration plates





# Efforts to support the development of the e-mobility market in Poland

National Fund for Environmental Protection and Water Management (NFEP&WM)  
programs supporting the development of e-mobility in Poland

PROGRAM

**Green  
Public  
Transport**



Zero-emission buses,  
hydrogen charging and  
refueling infrastructure

PROGRAM

**Kangaroo**



Zero-emission school  
buses, charging  
infrastructure

PROGRAM

**Distribution system  
operators (DSO)  
dedicated program**



Electricity  
infrastructure

PROGRAM

**My EV**



Zero-emission  
passenger cars  
and delivery vans

PROGRAM



**Charging  
infrastructure  
support program**



Public and private  
charging  
infrastructure

# Programs supporting the development of the electric car fleet

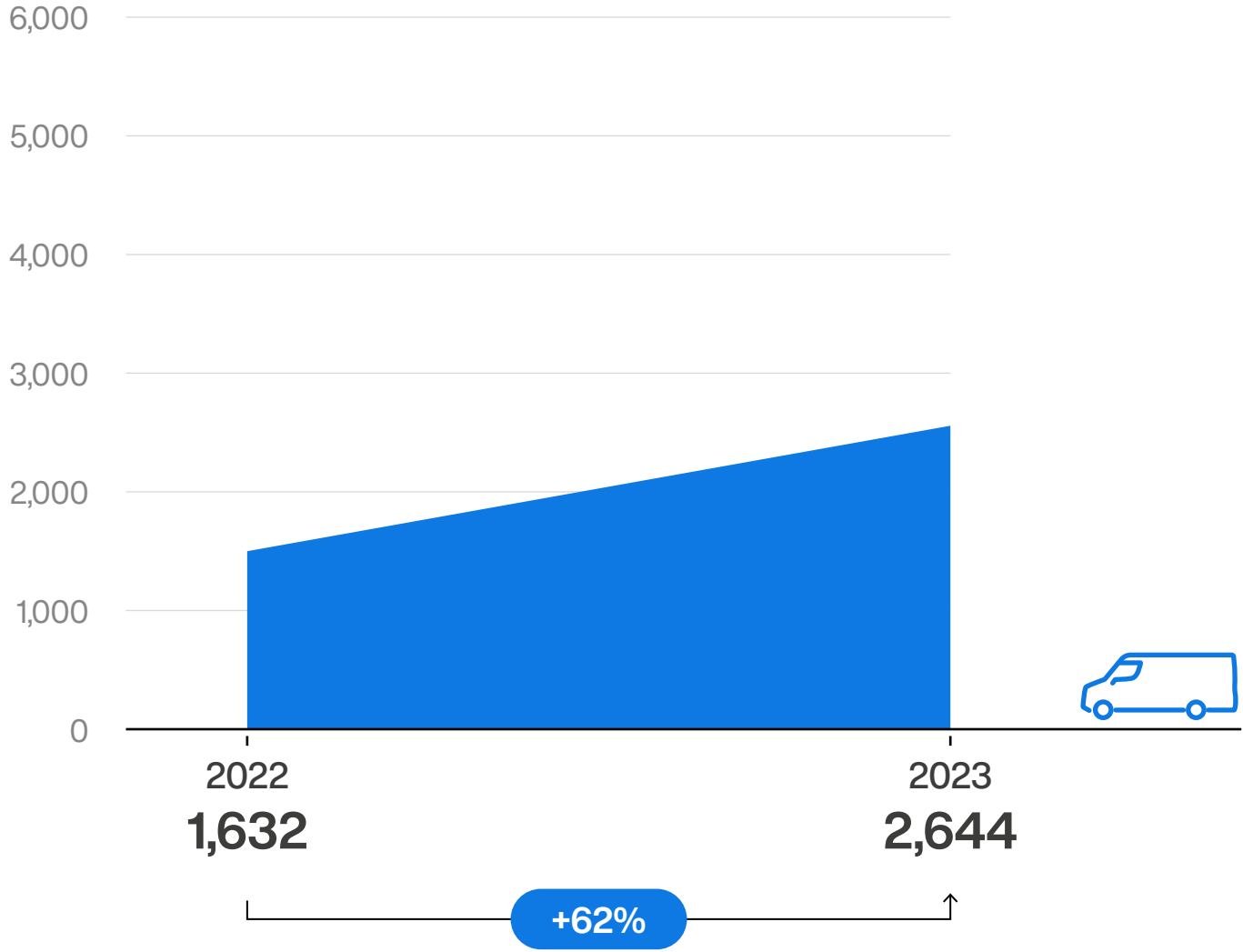
## “My EV”

<b>Responsible authority</b>	National Fund for Environmental Protection and Water Management	
<b>Budget</b>	<b>PLN 900,000,000</b> → Potential co-financing of <b>26,500 ZEV</b> (ca. EUR 210,000,000)	
	 <b>Natural persons</b>	 <b>Entrepreneurs</b>
<b>Form of support</b>	Purchase subsidy	Subsidy for the purchase, leasing or rental
<b>The maximum cost of purchasing a vehicle</b>	<b>PLN 225,000</b> (ca. EUR 49,924)	M1 Category <b>PLN 225,000</b> (ca. EUR 49,924)
	<b>No limit*</b>	N1 Category <b>No limit</b>
<b>Amount of support</b>	<b>PLN 18,750</b> (ca. EUR 4,160)	M1 Category <b>PLN 18,750</b> (ca. EUR 4,160 / no declared mileage) <b>PLN 27,000</b> (ca. EUR 5,991 / annual mileage > 15,000 km)
	<b>PLN 27,000*</b> (ca. EUR 5,991)	N1 Category <b>PLN 50,000 or up to 20% of eligible costs</b> (ca. EUR 11,094 / no declared mileage) <b>PLN 70,000 or up to 30% of eligible costs</b> (ca. EUR 15,532 / annual mileage > 20,000 km)

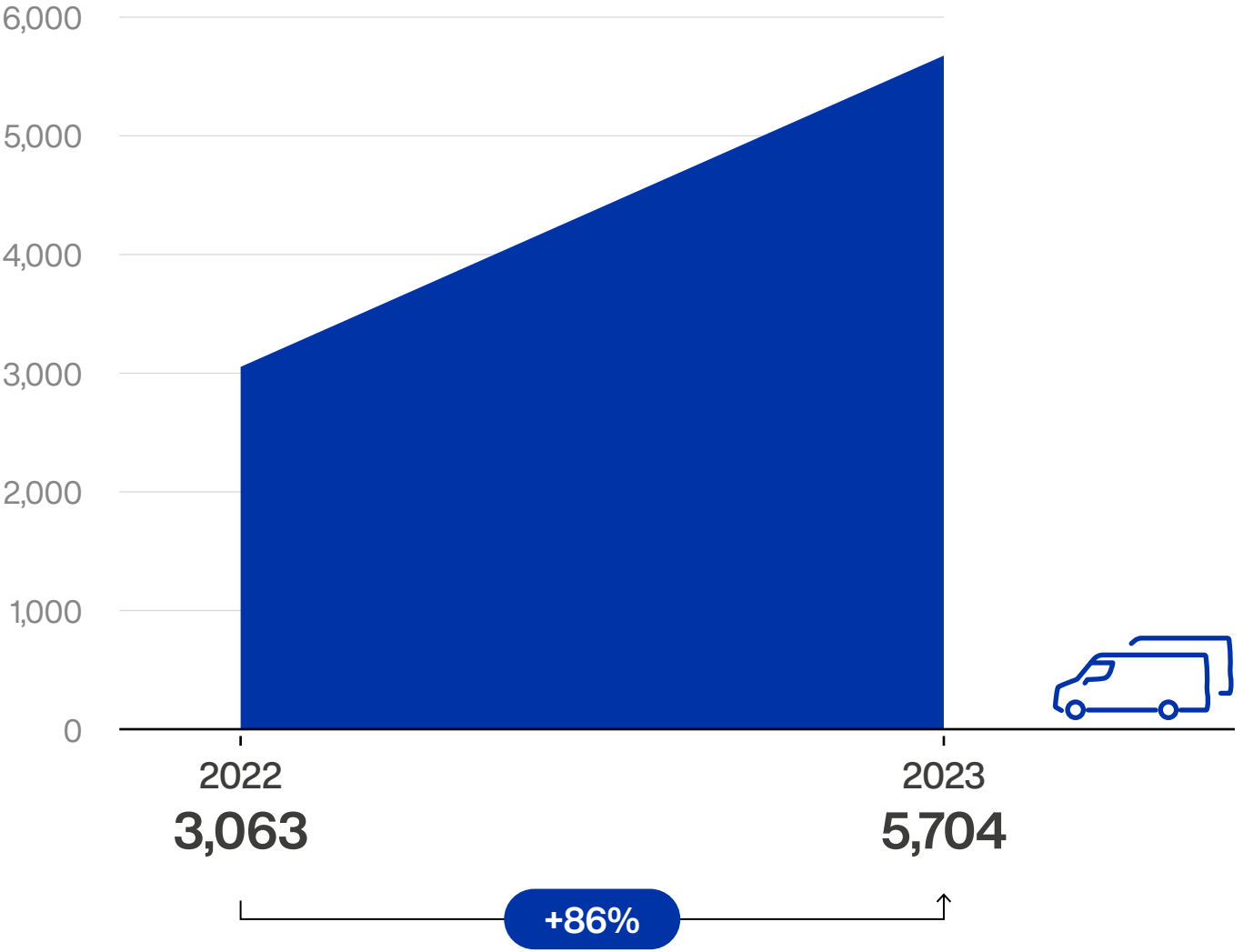
\* For Big Family Card holders

# Polish electric vans market

## Number of registrations (new and used)



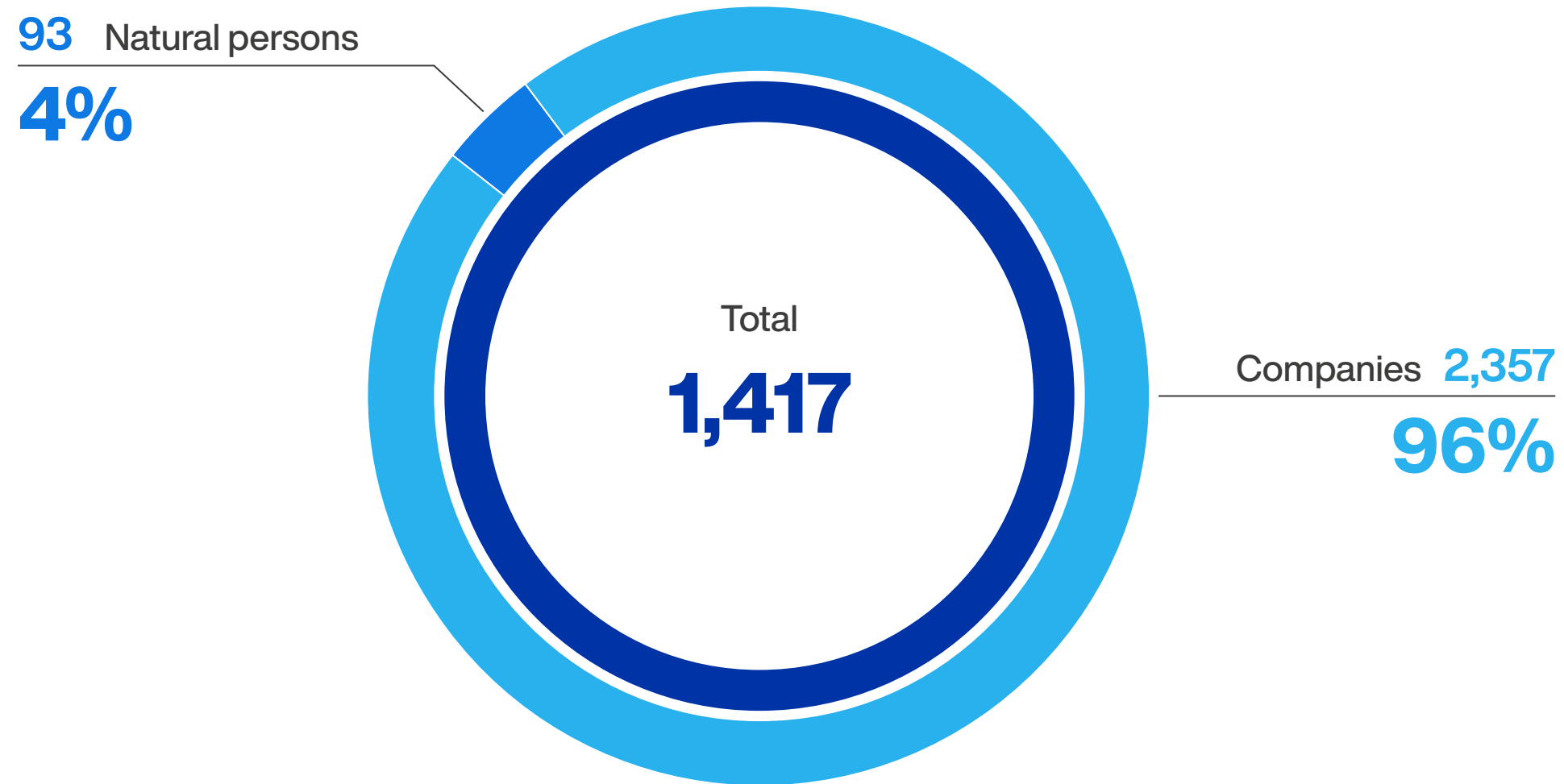
## Fleet (new and used)



Source: Polish EV Outlook 2024, PSNM

# Polish electric vans market

## Structure of new N1 category electric cars buyers 2023





# E-Mobility as an opportunity!

## E-BUS PRODUCTION FACILITIES

- Solaris – Bolechowo
- MAN Bus – Starachowice
- ARP E-vehicles – Solec Kuj.
- Autosan – Sanok

## EV'S MADE IN POLAND

- Volkswagen Poznań – Września
- Triggo – Warszawa
- Melex – Mielec
- Stellantis – Tychy, Gliwice
- Izera – Jaworzno (planned)
- Frugal – Wrocław
- Velex – Częstochowa

## EV CONSTRUCTION COMPONENT PRODUCTION FACILITIES

- Valeo Siemens eAutomotive – Czechowice-Dziedzice
- Ningbo Tuopu Group – Poznań
- Mitsui High-tec – Skalbmierz
- Korea Electric Terminal – Zabrze
- Maflow – Boryszew
- Medcom – Warszawa
- APTIV – Jeleśnia
- Bspl. – Skawina
- Bosch – Mirków
- Toyota Motor Manufacturing Poland – Wałbrzych

## CELLS, LITHIUM-ION BATTERIES AND BATTERY COMPONENTS FACILITIES

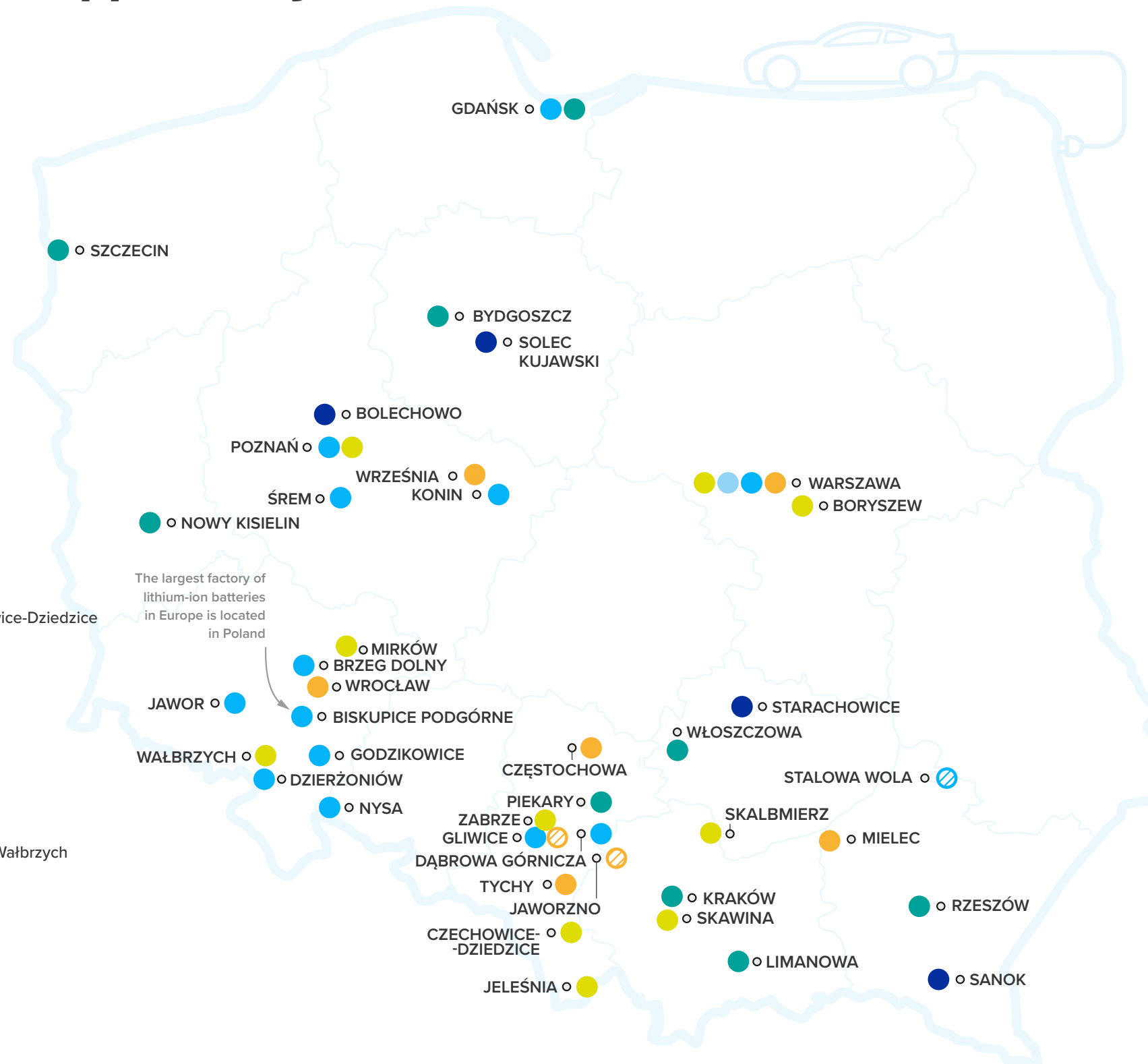
- LG Energy Solution – Biskupice Podgórne
- Northvolt – Gdańsk
- Daimler – Jawor
- BMZ – Gliwice
- Umicore – Nysa
- Guotai Huarong – Godzikowice
- LS EV Poland – Dzierżonów
- Impact Clean Power Technology – Warszawa
- Johnson Matthey – Konin
- Capchem – Śrem
- PCC Rokita i Shida – Brzeg Dolny
- SK IE Technology – Dąbrowa Górnicza
- Exide Technologies – Poznań
- SK Nexilis – Stalowa Wola (planned)

## EV CHARGING STATIONS PRODUCTION FACILITIES

- Garo Polska – Szczecin
- Ekoenergetyka-Polska – Nowy Kisielin (near Zielona Góra)
- Enelion – Gdańsk
- PRE Edward Biel – Piekary
- Kolejowe Zakłady Łączności – Bydgoszcz
- EC Enginneering – Kraków
- Phoenix Contact E-Mobility – Rzeszów
- ZPUE – Włoszczowa
- GreenCell – Kraków
- Z.U.P. EMITER – Limanowa

## EV POWERTRAIN COMPONENT PRODUCTION FACILITIES

- MEDCOM – Warszawa



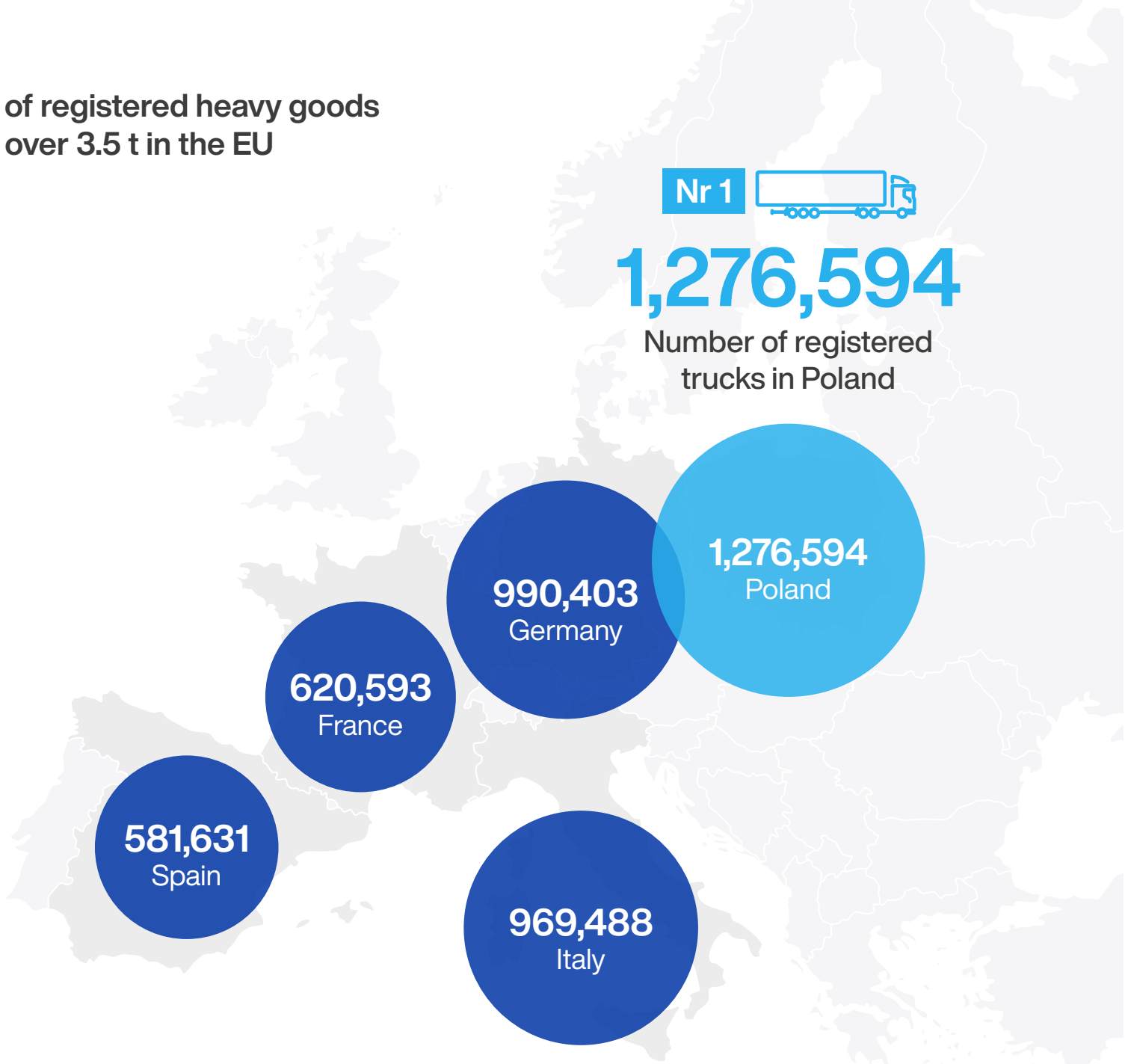
# The HDV challenge

WE  
DRIVE  
NEW  
MOBILITY

# Poland as the European center of heavy road transport

Number of registered heavy goods vehicles over 3.5 t in the EU (2022)

TOP 5



**19.8%**

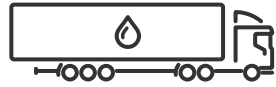
Transport services in the EU are performed by Polish carriers (by ton-kilometers)

Summary of annual cargo road transport in the EU by weight of transported goods (2021)  
(2021)

TOP 5		million ton-kilometers
<b>1</b>	Poland	<b>380</b>
<b>2</b>	Germany	<b>307</b>
<b>3</b>	Spain	<b>270</b>
<b>4</b>	Italy	<b>175</b>
<b>5</b>	France	<b>175</b>

Source: ACEA, Polish Economic Institute

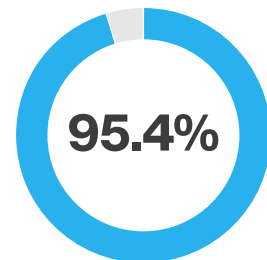
# The eHDV sector is rolling out



## Diesel

	2022	2023	Change
<b>1</b> Germany	73,862	91,242	+23.5%
<b>2</b> Great Britain	44,360	50,746	+14.4%
<b>3</b> France	41,827	45,771	+9.4%
<b>4</b> Poland	34,271	35,034	+2.2%
<b>5</b> Italy	24,713	27,758	+12.3%
<b>6</b> Spain	22,222	27,056	+21.8%
<b>7</b> Netherlands	12,913	14,886	+15.3%
<b>8</b> Lithuania	9,907	10,638	+7.4%
<b>9</b> Belgium	8,379	9,842	+17.5%
<b>10</b> Czechia	8,016	9,444	+17.8%
<b>EU + EFTA + UK</b>	353,872	411,652	+16.3%

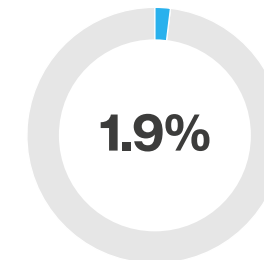
Share in the number of registrations



## eHDV

	2022	2023	Change
<b>1</b> Germany	804	2,169	+169.8%
<b>2</b> Great Britain	809	1,506	+86.2%
<b>3</b> Netherlands	116	1,148	+889.7%
<b>4</b> Norway	364	705	+93.7%
<b>5</b> France	166	595	+258.4%
<b>6</b> Switzerland	175	385	+120.0%
<b>7</b> Spain	160	341	+113.1%
<b>8</b> Denmark	89	316	+255.1%
<b>9</b> Sweden	164	292	+78.0%
<b>10</b> Belgium	24	113	+370.8%
<b>11</b> Poland	6	85	+1,316.7%
<b>EU + EFTA + UK</b>	3,707	7,975	+115.1%

Share in the number of registrations





# NEW MOBILITY CONGRESS

The most important event of the sustainable transport sector in Poland and the CEE region.

Forum of leaders, experts and practitioners of the electric vehicle market, people professionally related to the e-mobility industry.

A place for the exchange of knowledge and experience (B2B) for key stakeholders of the zero-emission transport technologies market

DATE

24-26 September 2024 / EXPO Łódź



New  
Mobility  
Congress  
Kongres Nowej Mobilności



psnm.org

psnm

**WE DRIVE  
NEW MOBILITY!**

**Let's work together!**

**NEW MOBILITY ASSOCIATION**

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