

Electric vehicle infrastructure Italy

More than 21 000 charging stations for electric vehicles (EVs) will be operational by 2026 on urban and inter-urban roads across Italy. This was the subject of two new decrees that were published in early January 2023 by the Italian Ministry of the Environment and Energy Security (MASE).

The development of electric mobility is crucial to achieve the aims of national decarbonisation policies. However, as of January 2023, EVs only accounted for 0.1% of the total number of registered vehicles, according to analysis carried out by the Italian Government. The National Recovery and Resilience Plan (NRRP) foresees "a fleet of around 6 million EVs by 2030" and a network of "31 500 public fast charging points" in order to achieve European decarbonisation objectives. For this reason, specific objectives, measures and investments have been defined in the NRRP to support the sector.

The regulatory framework on e-mobility in Italy is currently based on: (i) the Directive 2014/94/EU of the European Parliament and of the Council on the establishment of an infrastructure for alternative fuels ("DAFI"); and (ii) the National Infrastructure Plan for the recharging of electrically powered vehicles.

The overall objective of the new regulation is to set binding targets for the establishment of a network of alternative fuel charging and refueling points for alternative fuels for cars, vans and trucks in Europe.

The main focus of the AFIR Regulation is the obligation for member states to ensure that a certain number of accessible charging stations, with a prescribed minimum power level, are installed along the TEN-T core road network.

The public notice for the construction of EV recharging infrastructures in urban centres successfully selected projects that will allow the immediate installation of 4,718 electric recharging stations, for a total amount of around EUR70m (Ministerial Decree No. 10). Instead, the public notice for the presentation of project proposals for the construction of EV recharging infrastructure on motorways had a different outcome, and it was not possible to identify eligible proposals, with the consequent exclusion of all applications received? (Ministerial Decree No. 11).

At a national level, the National Recovery and Resilience Plan ("PNRR") supports the development of e-mobility with EUR740m of funds for the installation of 21,400 fast and ultra-fast charging infrastructures by the end of 2025.

Mission 2 (Green Revolution and Ecological Transition) of Component 2 (Renewable Energy, Hydrogen, Grid and Sustainable Mobility) of the PNRR aims to invest in the Development of Electric Charging Infrastructure? to install 7,500 fast charging infrastructures in suburban areas (excluding motorways) and 13,755 in urban centres, as well as 100 experimental charging stations with energy storage capabilities.

In 2022, charging points grew by 41% (10,748 units) and charging infrastructure by 46% (6,111 units), respectively. Comparing this data with that from 2021, during which charging points increased by 35% and infrastructure by 36%, there has been a significant acceleration in the growth rate.

In terms of charging power, 88% of the installed charging points are in alternating current (AC), while 12% are in direct current (DC). Moreover, these are installations with increasingly higher power ratings. In fact, the share of DC points doubled (in 2021, DC points were around 6%, compared to 12% in 2022), and the share of ultra-fast points (i.e. with 150+ kW) tripled in the last year.

Looking at the distribution between recharging points installed on public and private land, 72% of the detected recharging points are located on public land (e.g. roads) while the remaining 28% are on private land for public use (e.g. supermarkets or shopping centres).

Overall, more than 99% of the Italian territory has a charging point within a radius of 20 km and 86% within a radius of only 10 km?. The geographical distribution of public access charging points is distinctly uneven though, with 58% of said infrastructure located in Northern Italy, 22% in Central Italy Central and only 20% in the South and Islands.

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