

## From grids to vehicle charging experience: building a seamless e-mobility ecosystem

**European vehicle manufacturers, the European Automobile Manufacturers' Association (ACEA) and the electric vehicle charging industry, ChargeUp Europe, sign joint declaration supporting e-mobility ecosystem development.**

The shift to electric vehicles (EV) is completely transforming energy, transport, and digital systems. A new ecosystem is emerging, spanning from energy supplies, EV charging infrastructure, to digital platforms, and vehicles. The industry has acknowledged its joint commitment to the development of the e-mobility ecosystem.

However, to succeed, the industry's commitment must be supported by the EU and its way of operating, regulating and stimulating collaboration across the value chain. An "ecosystem approach" must be placed at the heart of any initiative and at all times.

We recognise that the e-mobility ecosystem is, in many ways, very different from that of refuelling combustion engine vehicles. We are therefore investing heavily in the future now, underpinning commitments to electrification. While our sectors are in an active investment phase, profitability is often a long-term prospect. Commercial investments are best enabled by competition, consistent political support, and a clear policy direction to provide certainty over the investment horizon.

### Why direct structured dialogue?

As integral parts of the same ecosystem, we recognise the importance of establishing a direct structural dialogue to enhance transparency and collaborate towards creating added value. As we gain deeper insights into each other's directions and plans, increased transparency will lead to more effective investments and ultimately deliver greater benefits to consumers.

We acknowledge mutual expectations. Availability and affordability of vehicles are foremost considerations when it comes to EV charging. Deployment of suitable public charging infrastructure for all vehicle segments is crucial for enhancing the confidence of those who are using battery-electric cars, vans, trucks and buses and improving their overall experience.

For light-duty vehicles such as cars and vans, the Alternative Fuel Infrastructure Regulation's (AFIR) dynamic, capacity-based targets aim to guarantee a minimum level of coverage; however, an ambitious and holistic implementation must follow. This implementation must incorporate private charging solutions and integrate smart energy management into the overall rollout strategy.

For heavy-duty vehicles, like trucks and buses with their distinct technical specifications and performance, AFIR targets are set to ensure the swift roll-out of an initial charging infrastructure network, which is essential to ensure many vehicle segments and diverse operation patterns can transition towards electrified powertrains.

The journey we are a part of will significantly evolve in the future. Convenience and the development of new services are key to the proposition our ecosystem must develop across all vehicle segments. Software will play a crucial role as the backbone enabling a competitive EV charging experience.

We have agency in the ongoing shift to electrification, translating regulatory frameworks into tangible investments, infrastructure, and decarbonisation efforts. While the industry is naturally progressing towards maturity and standardisation, we have the ability to expedite and organise this process. This dialogue represents our collective effort to self-organise and collaboratively build the foundations of the new ecosystem.

## Priority areas for collaboration and alignment

Integration of transport and energy systems is the equation we must collectively solve. This means we will jointly work on:

- Tackling grids as the number one bottleneck to the swift deployment of EV charging infrastructure. National Regulatory Authorities (NRAs) must adapt regulatory frameworks to give Distribution System Operators (DSOs) room to invest in the grid and ensure DSOs have transparent processes, with specific, enforceable deadlines to deliver a connection.
- Ensuring an effective “right to plug” is enforced for private and depot charging, to democratically bring EV charging closer to all drivers and fully integrate the built environment.
- Bringing the benefits of flexibility to drivers, taking advantage of dynamic tariffs and the integration and optimisation of data (e.g. from solar panels, dynamic tariffs to route planning). To effectively enable this, sharing relevant, selected data across the ecosystem (TSO/DSO<sup>1</sup>, Utility, CPO<sup>2</sup>, vehicle manufacturers) is key.
- Further contributing to the development of V1G and V2G and other energy management solutions, promising technologies with significant potential benefits for customers, the grid, and the e-mobility ecosystem.
- For heavy-duty vehicles, which are used in commercial operations, grid access and energy management poses distinct challenges. Unlike cars, heavy-duty vehicles are usually in continuous operation mode throughout the day (and night) and many do not return to their home depot every night. A better joint understanding of their distinct operation parameters, requirements, associated challenges and potential business models still has to be developed.
- Providing guidance to policy makers on ensuring that the single market effectively supports the ecosystem. Policy instability and single market fragmentation deter investments and lead to additional costs, ultimately eroding Europe’s industrial competitiveness.

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<sup>1</sup> Transmission system operator (TSOs) and a distribution system operator (DSO)

<sup>2</sup> Charge Point Operator (CPO)

That is why **ACEA and ChargeUp Europe are joining forces** and will hold a regular structured dialogue to:

- Advocate for a unified EU approach that transcends institutional barriers, encouraging decision makers<sup>3</sup> to align their structures with the industrial and economic dynamics of the e-mobility ecosystem. It's imperative to better connect institutional dots to foster cohesion and effectiveness in policy making.
- Engage relevant European and national stakeholders to offer capacity-building so that they have a better vision of the evolution of the market (for the uptake of both light and heavy-duty vehicles) and can help DSOs reinforce planning and develop solutions and business models for the integration of vehicles of different types into the grid.
- Shape the implementation of a strong “right to plug”, educating national authorities on the importance of this innovation introduced by the EU as a tool to facilitate EVs becoming mainstream across Europe.
- As a priority, explore two specific industry initiatives:
  - Ensuring the Megawatt Charging System (MCS) standard is quickly available, to accelerate the rollout of ultra-fast public charging infrastructure for battery-electric heavy-duty vehicles.
  - Exploring challenges and developing solutions and business models for the path to vehicle-to-everything (V2X) for different vehicle segments. There exists a unique opportunity to make Europe’s electricity networks smart. Existing large-scale EV infrastructure networks can provide grid-balancing services, yet they are often constrained by regulatory barriers. We commit to increasing industry-to-industry exchanges and collaboration to pragmatically address blockers, notably via dedicated exchanges between experts.
- Make concrete proposals to upcoming EU policymakers to revive the single market agenda, linking its benefits to a strong manufacturing base in Europe and Europe’s global industrial competitiveness.

ACEA and ChargeUp Europe therefore agree to take forward this declaration and seek to influence policy discussions to enable its implementation and also invite other associations and relevant stakeholders to participate in the dialogue.

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**ChargeUp Europe**

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<sup>3</sup> DG GROW, MOVE, ENER, CNECT and R&D