

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
Africa	Algeria	National		Legislation	Ban on imports more than 3 years old.	Multiple	2021	Government of Algeria
Africa	Angola	National		Legislation	50% reduction of both import duty and vehicle tax for EVs.	Multiple	2022	Government of Angola
Central and South America	Antigua and Barbuda	National		Target	Transition the government fleet to all-electric by 2035.	Multiple	2021	Government of Antigua and Barbuda
Central and South America	Argentina	National		Ambition	2 500 jobs in battery manufacturing by 2030.	Manufacturing	2021	Government of Argentina
Central and South America	Argentina	National		Proposal	Ban on sale of new ICE vehicles from 2041.	Multiple	2021	Government of Argentina
Central and South America	Argentina	Subnational	Buenos Aires	Target	50% ZEV buses by 2030, 100% by 2050.	Bus	2020	Government of the City of Buenos Aires
Central and South America	Argentina	National		Ambition	National Sustainable Transportation plan promotes electromobility and EV manufacturing, among other things.	Multiple	2022	Government of Argentina
Central and South America	Argentina	Subnational	Buenos Aires	Target	30% low-emission cars in circulation by 2030, 100% by 2050.	LDV	2020	Government of the City of Buenos Aires
Eurasia	Armenia	National		Target	Between 200 000 and 400 000 EVs deployed, as well as 10% of ICEs replaced with hybrids by 2050.	LDV	2023	Government of Armenia
Eurasia	Armenia	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Central and South America	Aruba	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2022	CALSTART: Drive to Zero MOU
Asia Pacific	Australia	Subnational	Victoria	Ambition	50% of LDV fleet to be ZEV by 2030.	LDV	2021	Victoria State Government
Asia Pacific	Australia	National		Legislation	New Vehicle Efficiency Standard will reduce CO2 from new passenger vehicles by 60% between 2025 and 2029, and by 50% for light commercial vehicles.	LDV	2024	Government of Australia
Asia Pacific	Australia	Subnational	Victoria	Ambition	All new public buses to be ZEV by 2025.	Bus	2021	Victoria State Government
Asia Pacific	Australia	Subnational	New South Wales	Ambition	Transition the state's 8 000 buses to ZEVs, starting with Greater Sydney by 2035, Outer Metropolitan regions by 2040, and Regional New South Wales by 2047.	Bus		New South Wales Government
Asia Pacific	Australia	Subnational	Australian Capital Territory	Ambition	Free vehicle registration for new ZEV for two years, interest free loans and 50 new electric vehicle charging stations introduced as soon as practical.	Multiple		Australian Capital Territory Government
Asia Pacific	Australia	Subnational	Australian Capital Territory	Ambition	80-90% of new car sales to be ZEVs by 2030.	LDV	2022	Australian Capital Territory Government
Asia Pacific	Australia	National		Ambition	National Battery Strategy which aims to support the development of the battery manufacturing industry in Australia.	Manufacturing	2023	Government of Australia
Asia Pacific	Australia	National		Ambition	National Electric Vehicle Strategy which includes details of state-level targets and incentives.	Multiple	2023	Government of Australia
Asia Pacific	Australia	National		Legislation	The Critical Mineral's Strategy aims to grow the sector in Australia and is supported by the Critical minerals facility via project loans, loan guarantees, bonds and working capital support as a complement to commercial financing.	Manufacturing	2022	Government of Australia
Asia Pacific	Australia	National		Legislation	Funding for commercial fleet ZEVs purchase.	M/HDV	2022	Government of Australia
Asia Pacific	Australia	National		Legislation	Future Fuels Fund for the deployment of EV charging and hydrogen refuelling.	EVSE	2022	Government of Australia
Asia Pacific	Australia	Multi-national		Ambition	The pledge goal is 100% zero-emission LDV acquisitions of civil government owned and operated fleet, with aspirations for 100% zero-emission M/HDV acquisitions, by no later than 2035. Australia also specifically aims for 75% of new government passenger vehicles to be low emission by 2025.	LDV	2022	Zero Emissions Government Fleet Declaration
Europe	Austria	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2021	CALSTART: Drive to Zero MOU

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
Europe	Austria	National		Ambition	100% share of ZEVs in new bus sales by 2032.	Bus	2021	Government of Austria
Europe	Austria	National		Ambition	100% share of ZEVs in new car, light commercial, and two-wheeler sales by 2030.	LDV	2021	Government of Austria
Europe	Austria	National		Ambition	100% share of ZEVs in new heavy goods vehicle sales (above 18 tonnes) by 2035.	M/HDV	2021	Government of Austria
Europe	Austria	National		Ambition	100% share of ZEVs in new heavy goods vehicle sales (under 18 tonnes) by 2030.	M/HDV	2021	Government of Austria
Europe	Austria	National		Legislation	Grants towards electric two/three-wheelers.	2/3W	2023	Government of Austria
Europe	Austria	National		Legislation	Grants available for private BEVs/FCEVs, and lower rates for PHEVs or EVs with a range extender. Commercial rates are also available.	LDV	2023	Government of Austria
Europe	Austria	National		Legislation	EVs are exempt from standard consumption tax, motor-related insurance tax, and benefit-in-kind tax. Company vehicle EVs are tax deductible and VAT exempt.	Taxation	2023	Government of Austria
Europe	Austria	National		Legislation	Grants available for the installation of domestic, public and commercial charging infrastructure.	EVSE	2021	Government of Austria
Europe	Austria	National		Legislation	Grants towards the purchase of EV trucks depending on vehicle class.	M/HDV	2023	Government of Austria
Europe	Austria	National		Legislation	Grants towards the purchase of EV buses depending on class.	Bus	2023	Government of Austria
Europe	Austria	National		Ambition	Necessary infrastructure for all types of ZEV road transport to be in place by no later than 2035.	EVSE	2021	Government of Austria
Europe	Austria	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Eurasia	Azerbaijan	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Asia Pacific	Bangladesh	National		Target	30% of new registrations to be electric by 2030.	Multiple	2022	Government of Bangladesh
Asia Pacific	Bangladesh	National		Legislation	10 year tax holiday for local EV manufacturing and assembly, various incentives.	Manufacturing	2021	Government of Bangladesh
Europe	Belgium	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2022	CALSTART: Drive to Zero MOU
Europe	Belgium	Subnational	Wallonia and Brussels	Legislation	EVs are eligible for the lowest rate of annual ownership tax, HEVs are taxed in the same way as ICEs (engine size and emissions).	LDV		Government of Wallonia
Europe	Belgium	Subnational	Wallonia	Legislation	Progressively ban the use of older vehicles (Euro 1, 2, 3 ban delayed to 2025, Euro 4 in 2026, Euro 5 in 2028, Euro 6 in 2030), and allow for the introduction of more restrictive LEZs.	Multiple	2022	Government of Wallonia
Europe	Belgium	Subnational	Flanders	Target	20% of sales to be ZEV by 2025, and 50% BEV or FCEV sales and 20% PHEV in 2030.	LDV	2019	Government of Flanders
Europe	Belgium	Subnational	Flanders	Target	50% of all new purchases of non-urban buses, and at least 5% of trucks, will be zero-emission or low-carbon by 2030.	Bus	2019	Government of Flanders
Europe	Belgium	Subnational	Flanders	Target	All urban public transport will be HEV, BEV, or FCEV by 2025, with all buses emission free by 2035.	Bus	2019	Government of Flanders
Europe	Belgium	Subnational	Flanders	Target	At least 30% of new LCVs will be zero-emissions by 2030, and encouraging emission-free distribution from 2025.	LDV	2019	Government of Flanders
Europe	Belgium	Subnational	Flanders	Target	At least 5% of all trucks sales will be zero-emission or low-carbon by 2030.	M/HDV	2019	Government of Flanders
Europe	Belgium	Subnational	Flanders	Legislation	EVs are indefinitely exempt from both annual road and registration tax (PHEV and NG exemption ended in 2020). Tax relief via income tax of 15% also applies to the purchase of electric motorbikes, tricycles, and quadricycles.	LDV	2019	Government of Flanders
Europe	Belgium	Subnational	Flanders	Legislation	Tax relief equal to 45%, 30%, and 15% of the value of installation of a private charger applies in 2022, 2023, and 2024 respectively. Businesses installing chargers that are also publicly accessible are eligible for tax relief equal to 200% of the value of the installation in 2022, reducing to 150% in 2023 and 2024.	EVSE	2021	Government of Flanders

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
Europe	Belgium	Subnational	Flanders	Legislation	Tax relief for company vehicles is tied to emissions, with 0g CO2 vehicles qualifying for up to 120% relief. Electricity costs are deductible at 75%.	LDV	2020	Government of Flanders
Europe	Belgium	Subnational	Brussels	Legislation	Ban on diesel cars in the region by 2030, petrol cars by 2035.	LDV	2021	Brussels Regional Government
Europe	Belgium	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Central and South America	Bolivia	National		Ambition	Annual 10% growth in the share of EVs in the Bolivian public transportation fleet.	Bus	2022	Government of Bolivia
Central and South America	Bolivia	National		Legislation	Tax incentives and financial incentives for the manufacturing, assembly, import, and purchase of EVs.	Manufacturing	2021	Government of Bolivia
Central and South America	Brazil	National		Proposal	Proposed Senate Bill No. 392/2023 obliges fuelling stations to have EV chargers.	EVSE	2023	Government of Brazil
Central and South America	Brazil	National		Proposal	Deputies Bill No. 2156/2021 that aims to provide guidelines for the National Electric Mobility Policy.	Multiple	2021	Government of Brazil
Central and South America	Brazil	National		Proposal	Senate Bill No. 403/2022 that aims to grant exemption from Import Tax for electric and hybrid vehicles.	Taxation	2022	Government of Brazil
Central and South America	Brazil	National		Proposal	Resolution no. 532/2023 from the Executive Committee of the Foreign Chamber of Commerce establishes the gradual return of import tax on electric, hybrid and plug-in hybrid vehicles.	Taxation	2023	Government of Brazil
Central and South America	Brazil	National		Proposal	National Green Mobility and Innovation Program ("MOVER"), Provisional Measure 1,205/2023 establishes new guidelines for the local automotive sector, including fleet sustainability requirements and incentives for the production of new technologies.	Multiple	2023	Government of Brazil
Europe	Bulgaria	National		Ambition	Build 10 000 charging stations to facilitate at least 30 000 EVs by 2026.	EVSE	2022	Government of Bulgaria
Africa	Cabo Verde	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2023	CALSTART: Drive to Zero MOU
Africa	Cabo Verde	National		Target	100% EVs in government LDV stock by 2030.	LDV	2019	Government of Cape Verde
Africa	Cabo Verde	National		Target	15% share of EVs in medium truck sales by 2025, 35% by 2030 and 100% by 2035.	M/HDV	2019	Government of Cape Verde
Africa	Cabo Verde	National		Target	25% share of EVs in heavy truck sales by 2030 and 100% by 2035.	M/HDV	2019	Government of Cape Verde
Africa	Cabo Verde	National		Target	35% share of passenger LDV sales to be EVs by 2025, 70% by 2030 and 100% by 2035.	LDV	2019	Government of Cape Verde
Africa	Cabo Verde	National		Target	50% share of EVs in urban bus sales by 2025, 75% by 2030 and 100% by 2040.	Bus	2019	Government of Cape Verde
Africa	Cabo Verde	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Southeast Asia	Cambodia	National		Ambition	70% of motorcycle stock to be EVs by 2050.	2/3W	2021	Government of Cambodia
Southeast Asia	Cambodia	National		Ambition	40% of cars and urban buses to be EVs by 2050.	LDV	2021	Government of Cambodia
North America	Canada	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2019	CALSTART: Drive to Zero MOU

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
North America	Canada	Subnational	Yukon	Legislation	Homeowners can receive grants of 50%, businesses 75%, and municipalities/first nations 90% per charger installed.	EVSE		Government of Yukon
North America	Canada	Subnational	Yukon	Legislation	Rebate of 25% for a BEV motorcycle.	2/3W		Government of Yukon
North America	Canada	Subnational	Yukon	Legislation	Rebate towards the purchase of a BEV or PHEV with more than 50km range, or a lower amount for a PHEV with less than 50km range, which can be combined with federal incentives.	LDV		Government of Yukon
North America	Canada	Subnational	Quebec	Legislation	Requires ZEV sales to reach 22% in 2025, 85% in 2030 and 100% in 2035, aiming for 2 million EVs by 2030.	LDV	2020	Government of Quebec
North America	Canada	Subnational	Quebec	Target	100% of government cars, SUVs, vans and minivans and 25% of its pickup trucks to be electrified by 2030.	LDV	2020	Government of Quebec
North America	Canada	Subnational	Quebec	Target	Target of 6,700 public fast-charging and 110,000 level 2 public charging stations by 2030 supported by an increased budget and amendments to building standards.	EVSE	2023	Government of Quebec
North America	Canada	Subnational	Quebec	Target	40% of taxis to be electric by 2030.	LDV	2020	Government of Quebec
North America	Canada	Subnational	Quebec	Target	All new public/government funded buses will be electric by 2025, and 55% of city buses and 65% of school buses by 2030.	Bus	2020	Government of Quebec
North America	Canada	Subnational	Quebec	Ambition	Increase the number of fast-chargers to 2 500 by 2030, and up to 4 500 standard chargers.	EVSE	2020	Government of Quebec
North America	Canada	Subnational	Prince Edward Island	Legislation	Incentives towards the purchase or lease of a BEV or PHEV and voucher towards the cost of a charger installation.	LDV		Government of Prince Edward Island
North America	Canada	Subnational	Nova Scotia	Legislation	Rebate towards the purchase or lease of a BEV or a PHEV, which can be combined with federal incentives.	LDV		Government of Nova Scotia
North America	Canada	Subnational	Newfoundland and Labrador	Legislation	Rebate towards the purchase or lease of a BEV, lower amount for a PHEV, which can be combined with federal incentives.	LDV	2021	Government of Newfoundland and Labrador
North America	Canada	Subnational	New Brunswick	Legislation	Rebate towards the purchase of a BEV or PHEV with more than 50km range; lower amount for a PHEV with less than 50km range and for used vehicles, can be combined with federal incentives.	LDV	2021	Government of New Brunswick
North America	Canada	Subnational	British Columbia	Ambition	10 000 public EV charging stations by 2030.	EVSE	2021	Government of British Columbia
North America	Canada	Subnational	British Columbia	Legislation	Additional provincial level rebates which can be combined with federal rebates.	M/HDV	2021	Government of British Columbia
North America	Canada	Subnational	British Columbia	Legislation	Accelerated ZEV targets for light-duty sales of 26% by 2026, 90% by 2030 and 100% by 2035. Ahead of national ambition.	LDV	2023	Government of British Columbia
North America	Canada	National		Legislation	Auto manufacturers and importers must meet annual ZEV targets for light-duty sales of 20% by 2026, 60% by 2030 and 100% by 2035 (ZEV availability standard).	LDV	2023	Government of Canada
North America	Canada	National		Legislation	Canadian CO2 emissions standards are aligned with the US Phase 2 standard, 432-627 g CO2/bhp-hr (for tractors, vocational vehicles and spark ignition engines) and 48.3-413 g CO2/t-mile for (all other) various heavy commercial vehicles. This will reduce CO2 emissions by 5-27% in 2027 (depending on vehicle category and weight) compared to 2017.	M/HDV	2016	United States, Environmental Protection Agency
North America	Canada	National		Target	35% of M/HDV sales to be ZEV by 2030, and 100% of selected M/HDVs by 2040.	M/HDV	2022	Government of Canada
North America	Canada	National		Legislation	Contribution of up to 50% of the project cost (75% for indigenous businesses and communities) when installing charging infrastructure (Zero Emission Vehicle Infrastructure Program supported by Canada's Infrastructure Bank)	EVSE	2022	Government of Canada
North America	Canada	National		Legislation	Grants towards the purchase or lease of BEV, FCEV, or PHEV coaches (iMHZEV programme).	Bus	2022	Government of Canada
North America	Canada	National		Legislation	Database of charging incentives available for homes and businesses in Canada.	EVSE	2022	Government of Canada

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
North America	Canada	National		Legislation	Grant towards the purchase or lease of a new BEV, FCEV, or PHEV, lower value for PHEVs with less than 50km range (iZEV programme).	LDV	2019	Government of Canada
North America	Canada	National		Legislation	Grants towards the purchase or lease of BEV, FCEV, or PHEV trucks (iMHZEV programme).	M/HDV	2022	Government of Canada
North America	Canada	National		Legislation	Support public and school bus operators plan for electrification, funding 5 000 zero emission bus purchases and supporting infrastructure (Zero Emission Transit Fund).	Bus	2021	Government of Canada
North America	Canada	National		Legislation	Accelerated Capital Cost Allowance (CCA) for ZEVs.	Taxation	2019	Government of Canada
North America	Canada	Multi-national		Ambition	The pledge goal is 100% zero-emission LDV acquisitions of civil government owned and operated fleet, with aspirations for 100% zero-emission M/HDV acquisitions, by no later than 2035. Canada also specifically aims for 75% of all government LDV purchases to be ZEVs or hybrid, with the objective that the LDV fleet is 100% ZEV by 2030.	LDV	2022	Zero Emissions Government Fleet Declaration
North America	Canada	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Central and South America	Chile	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2021	CALSTART: Drive to Zero MOU
Central and South America	Chile	National		Target	100% of sales of LDVs will be zero-emissions by 2035, with an accompanying ban on ICE sales.	LDV	2021	Government of Chile
Central and South America	Chile	National		Target	100% of sales of heavy mobile machinery will be zero-emissions by 2035, 100% of sales of all mobile machinery (heavy and light) by 2040.	M/HDV	2021	Government of Chile
Central and South America	Chile	National		Legislation	Accelerated tax depreciation of electric, hybrid, and zero emissions vehicles.	Taxation	2021	Government of Chile
Central and South America	Chile	National		Ambition	Roadmap for promoting electromobility including near-term actions on charging, public transport, awareness and regulation.	Multiple	2023	Government of Chile
Central and South America	Chile	National		Proposal	National public charging infrastructure plan targeting charging stations along interurban routes at most every 100km apart.	EVSE	2023	Government of Chile
Central and South America	Chile	National		Legislation	Energy efficiency law which promotes the importation of BEVs and PHEVs. Entered into force in 2024, requiring fleet average efficiency of 5.3lge/100km for the period 2024-26.	Multiple	2021	Government of Chile
Central and South America	Chile	National		Target	100% of sales of M/HDVs will be zero-emissions by 2045.	M/HDV	2021	Government of Chile
Central and South America	Chile	National		Target	100% of sales of public transport vehicles will be zero-emissions by 2035.	Bus	2021	Government of Chile
Central and South America	Chile	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Asia Pacific	China	Subnational	Zhejiang	Target	Annual production of 600 000 NEVs by 2025.	Manufacturing	2021	Zhejiang Provincial Government
Asia Pacific	China	Subnational	Tianjin	Target	80% of public transport, taxis, logistics and delivery vehicle sales to be NEVs by 2025.	Multiple	2022	Tianjin Municipal People's Government
Asia Pacific	China	Subnational	Tianjin	Target	NEV sales to account for around 25% of total new car sales by 2025 and around 50% of total new car sales by 2030 (Plan for Carbon Peaking).	LDV	2022	Tianjin Municipal People's Government
Asia Pacific	China	Subnational	Sichuan	Target	Proportion of new energy- and clean energy-powered transport (not including motorcycles) to reach around 40% by 2030 (Plan for Carbon Peaking).	LDV	2022	Sichuan Provincial Government
Asia Pacific	China	Subnational	Shenzhen	Target	Construct a total of about 43 000 fast charging piles in the public and private networks and about 790 000 slow charging piles in the basic network by 2025.	EVSE	2022	Shenzhen Municipal Government
Asia Pacific	China	Subnational	Shenzhen	Target	Proportion of NEVs among newly registered vehicles (excluding replacement and renewal) in Shenzhen to reach 60% by 2025. The number of NEVs will reach about 1 million.	Multiple	2022	Shenzhen Municipal Government

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
Asia Pacific	China	Subnational	Shanxi	Target	Proportion of new energy- and clean energy-powered transport to reach around 40% by 2030 (Plan for Carbon Peaking).	LDV	2023	Shanxi Provincial Government
Asia Pacific	China	Subnational	Shanghai	Target	Construct 10 000 public EV charging piles in 2024.	EVSE	2024	Shanghai Municipal Government
Asia Pacific	China	Subnational	Shanghai	Target	Aims for carbon from urban transportation to peak by 2030 (Plan for Carbon Peaking in the Transport Sector).	Bus	2023	Shanghai Municipal Government
Asia Pacific	China	Subnational	Shanghai	Target	Implementation Plan for Energy Saving and Emissions Reduction Integrated Tasks for the 14th Five Year Plan Period in Shanghai: BEVs to make up more than 50% of new personal vehicle purchases by 2025.	LDV	2022	Shanghai Municipal Government
Asia Pacific	China	Subnational	Shanghai	Target	BEVs to make up more than 50% of new personal vehicle purchases by 2025 and more than 40% of car stock by 2035 (Plan for Carbon Peaking).	LDV	2022	Shanghai Municipal Government
Asia Pacific	China	Subnational	Shanghai	Legislation	Subsidies for charging point and battery swapping installations with varying rates for community or commercial projects, as well as subsidised charging for taxis.	EVSE	2022	Shanghai Municipal Government
Asia Pacific	China	Subnational	Shandong	Ambition	Aims for road transport oil consumption to peak before 2030 (Plan for Carbon Peaking).	Multiple	2022	Shandong Provincial Government
Asia Pacific	China	Subnational	Ningxia	Target	NEV sales to account for around 20% of total new car sales by 2025, new energy and clean energy-powered vehicle sales to reach around 40% by 2030 (Plan for Carbon Peaking).	LDV	2022	Ningxia Hui Autonomous Region Government
Asia Pacific	China	Subnational	Liaoning	Target	Proportion of new energy- and clean energy-powered transport vehicles to reach around 40% by 2030 (Plan for Carbon Peaking).	LDV	2022	Liaoning Provincial Government
Asia Pacific	China	Subnational	Jilin	Ambition	Increase the proportion of clean transportation, encourage companies to replace freight vehicles with NEVs and to promote the elimination of old diesel vehicles, build charging infrastructure in highway service areas, logistical hubs and hubs for freight vehicles.	Multiple	2024	Jilin Provincial Government
Asia Pacific	China	Subnational	Jilin	Target	Production capacity of NEVs to reach around 1 million by 2025, accounting for 20% of all cars.	Manufacturing	2022	Jilin Provincial Government
Asia Pacific	China	Subnational	Jilin	Target	Proportion of new energy and clean energy-powered transport vehicles to reach around 40% by 2030 (Plan for Carbon Peaking).	LDV	2022	Jilin Provincial Government
Asia Pacific	China	Subnational	Jiangsu	Target	NEV sales to account for more than 20% of total new car sales by 2025 (Plan for Carbon Peaking).	LDV	2022	Jiangsu Provincial Government
Asia Pacific	China	Subnational	Inner-Mongolia	Target	Inner Mongolia Autonomous Region aims for the proportion of new energy and clean energy-powered transport vehicles (excluding motorbikes) to reach around 40% by 2030 (Plan for Carbon Peaking).	LDV	2022	Inner Mongolia Autonomous Region Government
Asia Pacific	China	Subnational	Hunan	Target	Proportion of transport not powered by fossil energy to reach around 40% by 2030 (Plan for Carbon Peaking).	Multiple	2022	Hunan Provincial Government
Asia Pacific	China	Subnational	Hunan	Target	By 2025, construct over 400 000 charging piles, aiming to reach a car-charging pile ratio of 2:1.	EVSE	2023	Hunan Provincial Government
Asia Pacific	China	Subnational	Hunan	Legislation	Subsidies provided per kW of charging installed, with greater amounts for those installed along highways; varies between regions of the province.	EVSE	2022	Hunan Provincial Government
Asia Pacific	China	Subnational	Henan	Legislation	As a part of Henan Province's support to its economic development of the first quarter of the year, in addition to the national tax exemption to NEVs, Henan Provincial Government and municipal government jointly provide subsidies to NEV purchases at 5% of the retail price.	LDV	2024	Henan Provincial Government
Asia Pacific	China	Subnational	Hainan	Target	End sales of petrol or diesel vehicles by 2030; 100% NEVs in vehicle sales (Plan for Carbon Peaking).	LDV	2022	Hainan Provincial Government

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
Asia Pacific	China	Subnational	Hainan	Ambition	End the sale of petrol and diesel vehicles by 2030. From 2030, all vehicle sales will be either NEVs or natural gas vehicles.	LDV	2019	Hainan Provincial Government
Asia Pacific	China	Subnational	Guizhou	Target	Proportion of new energy and clean energy-powered operating vehicles and ships to reach around 40% by 2030 (Plan for Carbon Peaking).	Multiple	2022	Guizhou Provincial Government
Asia Pacific	China	Subnational	Guangzhou	Target	800 000 NEV stock for passenger LDVs by 2025, accounting for 20% of all car stocks by 2025. NEVs account for 50% of car sales.	LDV	2021	Guangzhou Municipal Government
Asia Pacific	China	Subnational	Guangxi	Target	Proportion of new energy and clean energy-powered transport vehicles to reach around 40% by 2030 (Plan for Carbon Peaking).	LDV	2023	Guangxi Zhuang Autonomous Region Government
Asia Pacific	China	Subnational	Guangdong	Target	By 2025, NEV production to reach more than 3 million, public NEV charging piles to reach more than 210 000 (A strategic action plan for the auto industry in Guangdong Province).	EVSE	2024	Guangdong Provincial Government
Asia Pacific	China	Subnational	Guangdong	Target	Proportion of new energy and clean energy-powered transport vehicles to reach around 40% by 2030 (Plan for Carbon Peaking).	LDV	2023	Guangdong Provincial Government
Asia Pacific	China	Subnational	Guangdong	Legislation	Grants provided per kW of charging installed with greater amounts for DC than for AC; varies between regions of the province.	EVSE	2022	Guangdong Bureau of Energy
Asia Pacific	China	Subnational	Guangdong	Target	From 2021, 100% of new buses should be NEVs.	Bus	2021	Guangdong Provincial Government
Asia Pacific	China	Subnational	Guangdong	Target	From 2021, 80% of taxis and delivery vehicles should be NEVs.	LDV	2021	Guangdong Provincial Government
Asia Pacific	China	Subnational	Chongqing	Ambition	Sell and produce more than 10% of the country's intelligent NEVs by 2025.	Manufacturing	2022	Chongqing Municipal People's Government
Asia Pacific	China	Subnational	Chongqing	Target	Build more than 240 000 EV chargers by 2025.	EVSE	2022	Chongqing Municipal People's Government
Asia Pacific	China	Subnational	Beijing	Target	2 million NEVs on the road by 2025. Proportion of new vehicle sales being new energy and clean energy-powered transport to reach around 40% by 2030 (Plan for Carbon Peaking).	LDV	2022	Beijing Municipal Government
Asia Pacific	China	Subnational	Anhui	Ambition	Aims for road transport oil consumption to peak before 2030 (Plan for Carbon Peaking for the Industry Sector).	Multiple	2022	Anhui Provincial Government
Asia Pacific	China	National		Ambition	A set of policies to support international trade of NEVs.	Manufacturing	2024	China, Ministry of Commerce
Asia Pacific	China	National		Target	Pilot project to electrify public sector vehicles - 80% of new buses, taxis, sanitation vehicles, postal and urban logistics vehicles to be NEVs by 2025 with a number of charging piles equal to the amount of new NEVs installed.	Multiple	2023	China, Ministry of Industry and Information Technology
Asia Pacific	China	National		Target	By 2025, no less than 80% NEVs in new buses, taxis, municipal logistical vehicles, and municipal LCVs in key air pollution control regions; by 2025, no less than 80% coverage of fast chargers in highway service stations in key air pollution control regions, and no less than 60% in other regions. Encourage local government to provide support to charging infrastructure for NEV buses. Promote zero emission freight in the industry sector and logistical hubs.	Multiple	2023	China State Council
Asia Pacific	China	National		Ambition	Establish a high-quality charging infrastructure system by 2030, ensuring city-level full coverage, highway-level linear coverage, and spotted-coverage of rural areas.	EVSE	2023	China State Council

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
Asia Pacific	China	National		Target	By 2025, establish a preliminary interactive network between vehicles and the grids and fully implement peak and valley (peak/off-peak) pricing mechanism for EV charging. In the 5 pilot cities, by 2025, aim to have 60% of annual EV charging electricity concentrated during valley price time, and 80% of private EV charging pile utilisation concentrated during valley price time. By 2030, fully establish the interactive network between vehicles and the grids, aiming to provide flexibility for the electricity system at 10 GW level.	EVSE	2023	China's National Development and Reform Commission
Asia Pacific	China	National		Ambition	NEV sales in key air pollution control regions to account for about 50% of new vehicle sales by 2030 (Synergetic Reduction of Pollution and Carbon Emission).	LDV	2022	China, Ministry of Ecology and Environment
Asia Pacific	China	National		Ambition	Proportion of new energy and clean energy-powered transport to reach around 40% by 2030, and CO2 emissions intensity of new passenger cars and commercial vehicles to fall by more than 25% and 20% respectively compared to 2020 (Plan for Carbon Peaking in the Industry Sector).	Multiple	2022	China, Ministry of Industry and Information Technology, National Development and Reform Commission, Ministry of Ecology and Environment
Asia Pacific	China	National		Target	NEV sales to account for 45% of new vehicle sales by 2027.	Multiple	2023	China State Council
Asia Pacific	China	National		Ambition	NEV sales to account for 45% of new vehicle sales by 2025, and 60% by 2030.	Multiple	2023	China Society of Automotive Engineers, China Automotive Technology and Research Centre
Asia Pacific	China	National		Legislation	NEVs are exempted from China's vehicle and vessel tax.	Taxation	2018	China, State Taxation Administration
Asia Pacific	China	National		Legislation	NEV exemption from vehicle purchase tax extended to the end of 2025, and a reduction of NEV vehicle purchase tax by 50% between 2026 - 2027.	Taxation	2023	China, Ministry of Finance, State Taxation Administration, Ministry of Industry and Information Technology
Asia Pacific	China	National		Ambition	Installation of charging infrastructure for more than 20 million EVs by 2025, includes subsidised public stations, and encourages regional governments to establish standards and subsidies that promote quality of service.	EVSE	2022	China National Development and Reform Commission
Asia Pacific	China	National		Legislation	Updated Lithium-ion Battery Industry Regulatory Conditions and the Lithium-ion Battery Industry Regulatory Management Measures set out specific standards on battery, cathode material, anode material, separator and electrolyte.	Manufacturing	2021	China, Ministry of Industry and Information Technology
Asia Pacific	China	National		Target	72% share of NEVs in national urban public transport stock and 20% in logistics distribution stock by 2025.	Bus	2021	China, Ministry of Transport
Asia Pacific	China	National		Ambition	11 pilot cities to demonstrate battery swapping technology, ultimately aiming to promote more than 100 000 battery swapping-enabled EVs, and more than 1 000 battery swapping stations in the demonstration period.	EVSE	2021	China's Ministry of Industry and Information Technology
Asia Pacific	China	National		Ambition	China's Action Plan for Reaching Carbon Dioxide Peak Before 2030: Proportion of new energy and clean energy-powered vehicle sales (for transport) to reach around 40% by 2030.	Multiple	2021	China, State Council
Asia Pacific	China	National		Target	Achieve an average electricity consumption of new passenger BEVs ≤ 12.0 kWh/ 100 km by 2025.	Manufacturing	2020	China State Council
Asia Pacific	China	National		Ambition	NEV sales account for around 20% of total new vehicle sales by 2025.	LDV	2020	China State Council

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
Asia Pacific	China	National		Proposal	Total FCEV fleet reaches around 100 000 by 2025, and around 1 million during the 2030 - 2035 period (Energy-saving and New Energy Vehicle Technology Roadmap 2.0, prepared by China Society of Automotive Engineers, not official government policy).	M/HDV	2020	China Society of Automotive Engineers
Asia Pacific	China	National		Target	By 2025, in major ports in areas including Beijing-Tianjin-Hebei region, Yangtze River basin and the Greater Bay, reach 80% of connected waterway, railway, conveyor belt and NEVs in the transport of bulk cargos.	M/HDV	2023	China, Ministry of Transport
Asia Pacific	China	National		Legislation	Updated Parallel Management Regulation for Corporate Average Fuel Consumption and NEV Credits: the required NEV proportion for 2024 and 2025 is set at 28% and 38%, respectively.	LDV	2023	China, Ministry of Industry and Information Technology
Asia Pacific	China	National		Target	Proportion of NEVs in new or updated government vehicles for public transport, rental, logistics and distribution in national pilot ecological civilisation zones and key regions for air pollution prevention and control should be no less than 80% from 2021 onwards.	Multiple	2020	China State Council
Asia Pacific	China	National		Legislation	Strengthened regulation for NEV manufacturer.	Manufacturing	2020	China, Ministry of Industry and Information Technology
Asia Pacific	China	National		Ambition	Aiming to increase competitiveness in the global auto industry by 2025, focussing on NEVs and intelligent vehicle technologies. (China's mid-to-long-term automotive industry development plan).	Manufacturing	2017	China, Ministry of Industry and Information Technology
Asia Pacific	China	National		Legislation	Fuel economy standard tightened: By 2025, passenger LDVs to reach 4.0L/100km as measured by the worldwide harmonized light vehicle test procedure (WLTP).	LDV	2019	China State Administration for Market Regulation
Asia Pacific	Chinese Taipei			Ambition	EVs to make up 35% of scooter sales by 2030, 70% by 2035, and 100% by 2040.	2/3W	2022	Government of Chinese Taipei
Asia Pacific	Chinese Taipei			Ambition	All new passenger cars and 2/3W to be zero-emission by 2040	LDV	2022	National Development Council, Chinese Taipei
Asia Pacific	Chinese Taipei			Ambition	35% of the urban bus fleet to be electric by 2025; 100% by 2030.	Bus	2022	Government of Chinese Taipei
Asia Pacific	Chinese Taipei			Ambition	EVs to make up 30% of private passenger car sales by 2030, 60% by 2035, and 100% by 2040.	LDV	2022	Government of Chinese Taipei
Central and South America	Colombia	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030; 100% by 2040.	M/HDV	2023	CALSTART: Drive to Zero MOU
Central and South America	Colombia	National		Legislation	Law 1972 of 2019: 100% Compliance with Euro-VI equivalent standards for all HDVs in circulation by 2035.	M/HDV	2019	Government of Colombia
Central and South America	Colombia	National		Legislation	General sales tax (VAT) for electric vehicles, hybrids, and charging infrastructure to 5%. VAT for ICE vehicles is 19%.	Taxation	2016	Government of Colombia
Central and South America	Colombia	National		Legislation	EV motor taxes are capped at 1% of the vehicle's commercial value, and EVs are exempt from any vehicle circulation restrictions.	Taxation	2019	Government of Colombia
Central and South America	Colombia	National		Legislation	A national minimum share of 30% EVs for new public buses purchased or rented by 2025, while city bus fleets must ensure that 10% of new buses are EVs in 2025, rising every two years up to to 100% by 2035.	Bus	2019	Government of Colombia
Central and South America	Colombia	National		Legislation	Minimum EV charging infrastructure requirements specify a minimum of 5 charging stations in all Special Category municipalities and 20 stations by 2022 in Bogotá.	EVSE	2019	Government of Colombia
Central and South America	Colombia	National		Legislation	Minimum EV purchase quota of 30% for public service fleets by 2025.	Bus	2019	Government of Colombia

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
Central and South America	Colombia	National		Ambition	600 000 EV stock (i.e. registrations) across all modes by 2030.	Multiple	2019	Government of Colombia
Central and South America	Costa Rica	National		Ambition	25% of the fleet should be electric by 2035, 60% by 2050, and 100% of new sales by 2050.	LDV	2018	Government of Costa Rica
Central and South America	Costa Rica	National		Ambition	70% of buses to be zero-emissions by 2035, 100% by 2050.	Bus	2018	Government of Costa Rica
Central and South America	Costa Rica	National		Ambition	70% of taxis to be zero-emissions by 2035, 100% by 2050.	LDV	2018	Government of Costa Rica
Central and South America	Costa Rica	National		Legislation	Tax exemptions and reductions when purchasing an EV.	Taxation	2017	Government of Costa Rica
Central and South America	Costa Rica	National		Ambition	At least 50% of cargo to be highly efficient by 2050.	M/HDV	2018	Government of Costa Rica
Central and South America	Costa Rica	National		Ambition	By 2050, 60% of the fleet of light vehicles (private and institutional) will be zero emissions.	LDV	2018	Government of Costa Rica
Europe	Croatia	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2022	CALSTART: Drive to Zero MOU
Europe	Croatia	National		Proposal	Grants available for alternatively fuelled trucks.	M/HDV	2023	Government of Croatia
Europe	Croatia	National		Legislation	First vehicle tax calculated as a function of CO2 emissions (g/km).	Taxation	2022	Government of Croatia
Europe	Croatia	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Central and South America	Cuba	National		Ambition	45% of the total vehicle fleet in the country's state sector to be electric, and 38 000 charging points to be installed by 2030.	Multiple	2021	Government of Cuba
Central and South America	Curaçao	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2022	CALSTART: Drive to Zero MOU
Europe	Cyprus	National		Legislation	A tax is imposed upon the registration of new vehicles as a function of CO2 emissions.	Taxation	2022	Government of Cyprus
Europe	Cyprus	National		Legislation	Grants towards the purchase of a new ZEV M2 class bus.	Bus	2023	Government of Cyprus
Europe	Cyprus	National		Legislation	EUR 400 - 4 000 towards a new electric two/three-wheeler.	2/3W	2023	Government of Cyprus
Europe	Cyprus	National		Legislation	Grants towards the purchase of new or used EVs, can be combined with a scrappage scheme, higher rates apply to taxis, disabled persons, ZEVs, and large family cars.	LDV	2023	Government of Cyprus
Europe	Cyprus	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Europe	Czechia	National		Ambition	50% share of alternatively fuelled vehicles in the government (public) fleet (M1 and N1) by 2030.	LDV	2020	Government of the Czech Republic
Europe	Czechia	National		Legislation	Exemption from registration fee and road tolls for BEV, FCEV, and HEVs with CO2 emissions less than 50 grammes per km.	LDV	2020	Government of the Czech Republic
Europe	Czechia	National		Legislation	Funding available for government or municipal purchases of alternatively fuelled vehicles with 80% of funding for BEV/PHEV solutions.	Multiple	2017	Government of the Czech Republic
Europe	Denmark	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2021	CALSTART: Drive to Zero MOU
Europe	Denmark	National		Ambition	1 million passenger LDV stock to be ZEV by 2030.	LDV	2020	Government of Denmark
Europe	Denmark	National		Legislation	Road tax for trucks will be based on CO2 emissions from 2025.	M/HDV	2022	Government of Denmark
Europe	Denmark	National		Legislation	Additional financing available for charging stations for housing associations.	EVSE	2023	Government of Denmark
Europe	Denmark	National		Legislation	Grants towards the purchase of a new electric or hydrogen truck.	M/HDV	2022	Government of Denmark

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
Europe	Denmark	National		Legislation	Reduced registration taxes for zero- and low-emission cars, increasing gradually from 2026 to 2035. Typically, 60% discount for BEVs, and 35-50% discount for PHEVs. Aiming to reach the same registration tax as is seen on ICE.	LDV	2023	Government of Denmark
Europe	Denmark	National		Legislation	Tax reimbursement for BEV and a reduced rate for PHEVs when purchased as company cars from 2023-2026 and tax-free charging at work.	LDV	2023	Government of Denmark
Europe	Denmark	National		Target	Urban public transport to be emission-free from 2030, starting with new sales from 2020. 75% of public buses will be low- or zero-emission by 2030.	Bus	2018	Government of Denmark
Europe	Denmark	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Central and South America	Dominican Republic	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2022	CALSTART: Drive to Zero MOU
Central and South America	Dominican Republic	National		Ambition	5% of the private motorcycle fleet (plus 20% of the public sector fleet) to be electric by 2030; 35% by 2050.	2/3W	2020	Government of the Dominican Republic
Central and South America	Dominican Republic	National		Ambition	EV owners pay only 50% of the new car sales VAT tax and the first license plate.	Taxation	2020	Government of the Dominican Republic
Central and South America	Dominican Republic	National		Ambition	10% of the private car fleet being EVs by 2030; 70% by 2050 (10% and 50% for the light commercial fleet).	LDV	2020	Government of the Dominican Republic
Central and South America	Dominican Republic	National		Ambition	14 000 charging stations in 2030, 150 000 by 2050.	EVSE	2020	Government of the Dominican Republic
Central and South America	Dominican Republic	National		Ambition	30% of the fleet to be electric by 2030, and 100% by 2050.	Bus	2020	Government of the Dominican Republic
Central and South America	Dominican Republic	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Central and South America	Ecuador	National		Legislation	100% of new public transport fleet to be electric by 2025.	Bus	2019	Government of Ecuador
Central and South America	Ecuador	National		Legislation	Low and zero emission vehicles are exempt from VAT. They are also exempt of import taxes, along with charging equipment.	Taxation	2021	Government of Ecuador
Central and South America	El Salvador	National		Target	Scenarios include 7-20% EV sales penetration in 2030.	Multiple	2021	Government of El Salvador
Central and South America	El Salvador	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Africa	Ethiopia	National		Ambition	A ban on the import of non-EVs	Multiple	2024	Government of Ethiopia
Africa	Ethiopia	National		Legislation	EVs are not subject to import duties if locally assembled, reduced rates apply for partially and fully assembled imports. They are also exempt from VAT, surtax, and excise tax.	Taxation	2022	Government of Ethiopia
Europe	European Union	Supranational		Proposal	Euro 7 Regulations (provisional agreement) combine LDV and HDV regulations into one act, seeking a 35% and 13% reduction of NOx and tailpipe emissions respectively from LDVs and 56% and 39% from HDVs relative to Euro 6/VI. Introduces minimum durability standards for LDV batteries of 80% performance by year 5 (or 100 000 km), and 70% performance between years 5 and 8 (or 160 000 km), and also regulates emissions from tyres and brakes for the first time.	LDV	2022	European Commission
Europe	European Union	Supranational		Legislation	The EU Battery Regulation aims to create a circular economy for the batteries sector by targeting all stages of the life cycle of batteries, from design to waste treatment.	Manufacturing	2023	European Commission

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
Europe	European Union	Supranational		Legislation	CO2 emission standards: 15% CO2 emission reduction for both new cars and vans by 2025 compared to 2021 levels, 55% for cars and 50% for vans reduction by 2030, 100% reduction by 2035.	LDV	2022	European Commission
Europe	European Union	Supranational		Target	Clean Vehicles Directive: EV public procurement targets of 17.6% to 38.5% EV share of LDV sales by 2025.	LDV	2019	European Commission
Europe	European Union	Supranational		Target	Clean Vehicles Directive: Public procurement targets of 27% to 45% share of clean bus (M3) sales by 2026, and 33% to 65% by 2031, 50% of which must be ZEVs (or 25% if 80% or more of bus purchases in that period are double-deckers).	Bus	2019	European Commission
Europe	European Union	Supranational		Proposal	The EU Net Zero Industry Act aims to scale up manufacturing of clean technologies in the European Union, including batteries.	Manufacturing	2023	European Commission
Europe	European Union	Supranational		Proposal	Critical Raw Materials Act aims to reduce dependency on external suppliers of critical raw materials, including those needed to manufacture batteries.	Manufacturing	2022	European Commission
Europe	European Union	Supranational		Target	Clean Vehicles Directive: Public procurement targets of 6% to 10% share of clean HDV (N2 and N3) sales by 2026, and 7% to 15% by 2031.	M/HDV	2019	European Commission
Europe	European Union	Supranational		Ambition	1 million publicly accessible recharging points by 2025, and 3 million by 2030 (Sustainable and Smart Mobility Strategy).	EVSE	2020	European Commission
Europe	European Union	Supranational		Proposal	CO2 emission standards: Fleet average reductions of 45% by 2030, 65% by 2035 and 90% by 2040. All new city buses to be ZEV by 2035.	M/HDV	2024	European Commission
Europe	European Union	Supranational		Ambition	European Green Deal: 13 million low-emission passenger vehicles by 2025.	LDV	2019	European Commission
Europe	European Union	Supranational		Ambition	30 million passenger ZEV stock by 2030 and nearly all passenger LDV and HDV stock by 2050 (Sustainable and Smart Mobility Strategy).	LDV	2020	European Commission
Europe	European Union	Supranational		Legislation	Alternative Fuels Infrastructure Regulation: with respect to electric vehicle charging infrastructure, the regulation sets targets to ensure minimum coverage of publicly accessible recharging points for both light- and heavy-duty vehicles. Coverage is ensured on the basis of maximum distance between recharging pools, minimum power output per charging pool and individual charger power output.	EVSE	2023	European Parliament
Europe	Finland	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2021	CALSTART: Drive to Zero MOU
Europe	Finland	National		Ambition	4 600 electric trucks by 2030.	M/HDV	2021	Government of Finland
Europe	Finland	National		Ambition	700 000 electric car and 45 000 electric van stock by 2030 (of which at least 50% are BEVs).	LDV	2021	Government of Finland
Europe	Finland	National		Legislation	Grants for EV cars ended in 2022; grants for electric LCVs have been extended to the end of 2024.	LDV	2022	Government of Finland
Europe	Finland	National		Legislation	Grant towards the purchase of an EV truck.	M/HDV	2021	Government of Finland
Europe	Finland	National		Legislation	Funding support for alternative fuel infrastructure including charging stations.	EVSE	2022	Government of Finland
Europe	Finland	National		Proposal	Reform of benefit-in-kind taxation to favour low-emissions vehicles, and vehicle charging benefits will no longer be taxable.	LDV		Government of Finland
Europe	Finland	National		Legislation	Zero emission cars pay 0% import tax, and the lowest annual basic vehicle tax with additional vehicle tax based on vehicle weight and a fuel multiplier.	LDV	2022	Government of Finland
Europe	Finland	National		Target	At least 250 000 BEV, FCEV, and PHEVs by 2030.	Multiple	2020	Government of Finland
Europe	Finland	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Europe	France	National		Target	100 000 public charging points by 2023, 7 million public and private charging points by 2030, and 100 hydrogen stations increasing to 400 to 1 000 by 2028.	EVSE	2020	Government of France

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
Europe	France	National		Ambition	200 heavy commercial FCEV stock by 2023, and 800-2 000 heavy commercial FCEV stock by 2028.	M/HDV	2019	Government of France
Europe	France	National		Target	21 000 low-emission HDVs by 2023, 65 000 by 2028.	M/HDV	2020	Government of France
Europe	France	National		Ambition	5 000 passenger and commercial LDV FCEV stock by 2023 and 20 000-50 000 by 2028.	LDV	2018	Government of France
Europe	France	National		Target	660 000 EVs in 2023, 3 million by 2028; 500 000 PHEVs by 2023, 1.8 million by 2028; 170 000 EV/PHEV LCVs, 0.5 million by 2028.	LDV	2020	Government of France
Europe	France	National		Legislation	At least 50% of public buses and coaches must be low-emissions, 100% from 2025. In large towns/cities, at least 50% of buses must be very low-emission from 2022.	Bus	2019	Government of France
Europe	France	National		Legislation	At least 50% of public/state LDV renewals must be low-emission vehicles, rising to 70% from 2027. For local authorities, from 2026, 37.4% of all LDV renewals must be very low-emissions.	LDV	2019	Government of France
Europe	France	National		Legislation	End sale of new fossil fuel LDVs by 2040.	LDV	2019	Government of France
Europe	France	National		Target	EUR 100 million dedicated to developing charging infrastructure, aiming to cover 75% of the main road network with connections up to 5MW.	EVSE	2020	Government of France
Europe	France	National		Legislation	EVs must meet a minimum environmental score based on production, assembly, battery, and transport and logistics in order to qualify for French subsidies.	Multiple	2023	Government of France
Europe	France	National		Legislation	Subsidies of 30% of the cost of the installation of chargers that are made publicly available.	EVSE	2020	Government of France
Europe	France	National		Legislation	End sale of new passenger cars emitting more than 123 g CO ₂ /km by 2030.	LDV	2021	Government of France
Europe	France	National		Legislation	No new sales of new HDVs assigned to the transport of people or goods and using mainly fossil fuels by 2040.	M/HDV	2021	Government of France
Europe	France	National		Target	Reach 400 000 public charging points by 2030, including at least 50 000 with fast charging for a total of 8 GW of public charging capacity.	EVSE	2023	Government of France
Europe	France	National		Legislation	Grant of up to 40% of the cost of a new EV/FCEV truck.	M/HDV	2022	Government of France
Europe	France	National		Legislation	Express deduction of 20-60% of the investment cost in alternatively fuelled trucks depending on vehicle size.	M/HDV	2021	Government of France
Europe	France	National		Legislation	In 2022, companies with over 100 LDVs must include at least 10% low-emissions vehicles in their renewals, rising to 20% in 2024, 35% in 2027, and 50% by 2030 (Article 77).	LDV	2019	Government of France
Europe	France	National		Ambition	Produce 2 million electric and hybrid cars domestically by 2030.	LDV	2021	Government of France
Europe	France	National		Legislation	Tax relief available on the installation of a home charger.	EVSE	2020	Government of France
Europe	France	National		Legislation	Grants towards the purchase of a new BEV/FCEV, as well as used EVs and retrofits, bonuses for low-income individuals and/or when a vehicle is being scrapped.	LDV	2023	Government of France
Europe	France	National		Legislation	Implementation of LEZs in metropolitan agglomerations of more than 150 000 inhabitants by 31 December 2024, and provision for interest-free EV purchase loans to low-income households living in these zones.	Multiple	2021	Government of France
Europe	France	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Africa	Gambia	National		Target	Promote low emission fuel and HEVs, introduce an age limit of a maximum of 3 years for imported vehicles.	LDV	2022	Government of Gambia
Europe	Germany	National		Target	Nationwide plan for a comprehensive charging network including 9 000 fast chargers at 1 000 locations.	EVSE	2021	Government of Germany
Europe	Germany	National		Ambition	Plan to have 15 million EVs on Germany roads by 2030	LDV	2019	Government of Germany
Europe	Germany	National		Target	Approximately one-third of kilometres travelled to take place on the basis of electrical drives or eFuels by 2030.	M/HDV	2022	Government of Germany
Europe	Germany	National		Legislation	Tax incentives for commercial EVs, company cars, and company-facilitated EV charging.	Taxation		Government of Germany

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
Europe	Germany	National		Legislation	Motor tax exemption for EVs with less than 50g CO2/km emissions or at least 60km range (80km from 2025) until 2030. Privileges for electric cars on German roads, e.g. car parking and bus lane use.	LDV	2012	Government of Germany
Europe	Germany	Multi-national		Ambition	The pledge goal is 100% zero-emission LDV acquisitions of civil government owned and operated fleet, with aspirations for 100% zero-emission M/HDV acquisitions, by no later than 2035. Germany also specifically for 100% of all new or replacement vehicles to be environmentally friendly drive technologies by 2030, and by 2025 at least 50% of which will be electric drives.	LDV	2022	Zero Emissions Government Fleet Declaration
Africa	Ghana	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2023	CALSTART: Drive to Zero MOU
Africa	Ghana	National		Ambition	4%, 16%, and 32% of public buses sold to be EVs in 2025, 2030, and 2050 respectively.	Bus	2022	Government of Ghana
Africa	Ghana	National		Ambition	4%, 16%, and 32% of cars sold to be EVs in 2025, 2030, and 2050 respectively.	LDV	2022	Government of Ghana
Africa	Ghana	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Europe	Greece	National		Legislation	Ensure adequate charging facilities to meet EV targets.	EVSE	2022	Government of Greece
Europe	Greece	National		Legislation	From 2024, 25% of new company cars to have emissions less than 50gCO2/km from 2024. 33% of taxis and leased vehicles to be zero-emissions from 2026.	LDV	2022	Government of Greece
Europe	Greece	National		Proposal	50% of new registrations of passenger cars and 40% of new registrations of LCVs must be electric by 2030 (National Energy Climate Plan).	LDV	2024	Government of Greece
Europe	Greece	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Europe	Holy See	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Central and South America	Honduras	National		Proposal	At least 50% EVs in the urban public transport sector for passengers and light cargo by 2030. Announcement of possible adoption of ZEVs for mass public transport.	Bus	2022	Government of Honduras
Central and South America	Honduras	National		Proposal	20% of the fleet being electric by 2050, and 100% zero or low emission vehicles for light vehicles sales by 2050.	LDV	2023	Government of Honduras
Europe	Hungary	National		Legislation	BEVs and PHEVs with a range of over 25km are exempt from car tax, and partially exempt from company car and registration taxes.	LDV	2016	Government of Hungary
Europe	Hungary	National		Legislation	Funded programme that seeks to replace existing bus fleet with electric (BEV, FCEV, and trolley e-bus) options and encourage local production.	Bus	2019	Government of Hungary
Europe	Hungary	National		Legislation	Grants towards the private and commercial purchase of a BEV, up to 55% of the purchase cost for taxis.	LDV	2020	Government of Hungary
Europe	Iceland	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2023	CALSTART: Drive to Zero MOU
Europe	Iceland	National		Target	As of 2020, government entities will not purchase gasoline/petrol or diesel vehicles.	LDV	2020	Government of Iceland
Europe	Iceland	National		Legislation	Additional funding will be provided to the Energy Fund in 2024.	Multiple	2023	#VALUE!
Europe	Iceland	National		Proposal	Ban sales of passenger petrol and diesel vehicles after 2030.	LDV	2020	Government of Iceland
Europe	Iceland	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Asia Pacific	India	Subnational	West Bengal	Target	100 000 public and semi-public charging stations by 2026.	EVSE	2021	Government of India
Asia Pacific	India	Subnational	West Bengal	Ambition	1 million EVs in stock across all segments by 2030.	Multiple	2021	Government of India
Asia Pacific	India	Subnational	Uttar Pradesh	Target	1 000 electric buses in stock by 2030.	Bus	2019	NITI Aayog, Government of India

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
Asia Pacific	India	Subnational	Uttar Pradesh	Ambition	Roll out nearly 1 million EVs in stock across all segments of vehicles by 2024.	Multiple	2019	NITI Aayog, Government of India
Asia Pacific	India	Subnational	Tamil Nādu	Target	30% of bus stock to be electric by 2030.	Bus	2023	Government of Tamil Nadu, India
Asia Pacific	India	Subnational	Tamil Nādu	Target	750 charging stations to be incentivised under the State EV policy.	EVSE	2023	Government of Tamil Nadu, India
Asia Pacific	India	Subnational	Odisha	Ambition	BEVs to account for 20% of total vehicle sales by 2025.	Multiple	2021	NITI Aayog, Government of India
Asia Pacific	India	Subnational	Manipur	Ambition	15% of sales to be EV by 2025.	Multiple	2021	NITI Aayog, Government of India
Asia Pacific	India	Subnational	Maharashtra	Target	10% electric two-wheeler sales by 2025; 20% electric three-wheeler sales by 2025.	2/3W	2021	NITI Aayog, Government of India
Asia Pacific	India	Subnational	Maharashtra	Target	15% electric bus sales (25% in urban areas) by 2025.	Bus	2021	NITI Aayog, Government of India
Asia Pacific	India	Subnational	Maharashtra	Target	5% electric 4W sales by 2025, 25% for electric fleet operators.	LDV	2021	NITI Aayog, Government of India
Asia Pacific	India	Subnational	Madhya Pradesh	Ambition	100% electric commercial and logistics fleet sales by 2028.	2/3W	2019	NITI Aayog, Government of India
Asia Pacific	India	Subnational	Madhya Pradesh	Target	100% electric bus sales by 2028.	Bus	2019	NITI Aayog, Government of India
Asia Pacific	India	Subnational	Kerala	Target	100% electric bus sales by 2025.	Bus	2019	NITI Aayog, Government of India
Asia Pacific	India	Subnational	Kerala	Ambition	1 million EVs in stock by 2030 across all segments	Multiple	2019	NITI Aayog, Government of India
Asia Pacific	India	Subnational	Karnataka	Target	Three-wheeler sales to achieve 100% electric mobility by 2030.	2/3W	2017	NITI Aayog, Government of India
Asia Pacific	India	Subnational	Karnataka	Target	4W mini goods vehicles, cab aggregators, corporate fleets, and school buses/vans to achieve 100% electric mobility by 2030 in sales.	LDV	2017	NITI Aayog, Government of India
Asia Pacific	India	Subnational	Gujarat	Target	110 000 electric two-wheelers, 70 000 electric three-wheelers stock by 2025.	2/3W	2021	Government of Gujarat, India
Asia Pacific	India	Subnational	Gujarat	Target	20 000 4W EVs in stock by 2025.	LDV	2021	Government of Gujarat, India
Asia Pacific	India	Subnational	Goa	Legislation	100% exemption from road tax and one-time registration fee for BEVs. Subsidy of 20-50% on fixed capital investment amount (variable as per industry size). Manufacturing units will receive an exemption on goods and services tax (tax payable on purchase of goods) and stamp duty (tax payable on registration of properties).	Taxation	2021	Goa Government
Asia Pacific	India	Subnational	Delhi	Ambition	25% share of EVs in sales by 2024.	Multiple	2020	Government of Delhi, India
Asia Pacific	India	Subnational	Assam	Target	100 000 electric two-wheelers, 75 000 electric three-wheelers stock by 2026.	2/3W	2021	Government of Assam, India
Asia Pacific	India	Subnational	Assam	Target	100% electric buses sales by 2030.	Bus	2021	Government of Assam, India
Asia Pacific	India	Subnational	Assam	Target	BEVs to make up 25% of all vehicle registrations by 2026.	Multiple	2021	Government of Assam, India

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
Asia Pacific	India	Subnational	Assam	Target	100% of government vehicles to be converted to EVs by 2030.	Multiple	2021	Government of Assam, India
Asia Pacific	India	Subnational	Assam	Target	25 000 electric 4Ws in stock by 2026.	LDV	2021	Government of Assam, India
Asia Pacific	India	Subnational	Andhra Pradesh	Target	100% electric bus sales by 2029.	Bus	2018	NITI Aayog, Government of India
Asia Pacific	India	National		Target	FAME II sets objective of 2 700 charging stations in cities with more than 1 million inhabitants. Proposal for establishment of charging stations on major highways, every 25 km on both sides of the road.	EVSE	2019	India, Department of Heavy Industries
Asia Pacific	India	National		Legislation	FAME II extends subsidies for EV purchases. 1 000 000 2Ws, 500 000 3Ws, 35 000 4W BEVs, 20 000 4W HEV, 7 000 e-bus	Multiple	2019	India, Department of Heavy Industries
Asia Pacific	India	National		Ambition	If successful, FAME II and other measures could realise EV sales penetration of 30% of private cars, 70% of commercial cars, 40% of buses, and 80% of two and three-wheelers by 2030	Multiple	2019	Government of India
Asia Pacific	India	National		Legislation	Per kWh subsidy for electric two-wheeler increased to INR 15 000/kWh from earlier subsidy of INR 10 000/kWh, with a 50% local content requirement.	2/3W	2019	India, Department of Heavy Industries
Asia Pacific	India	National		Legislation	Passenger vehicles older than 20 years and commercial vehicles older than 15 years must pass a “fitness and emissions test” to retain their registration; incentives to scrap old vehicles, including discounts on the purchase of new vehicles against a scrappage certificate.	LDV	2021	Government of India
Asia Pacific	India	National		Legislation	Production Linked Incentive (PLI) Scheme for Advanced Cell Chemistry manufacturing in India.	Manufacturing	2021	India, Department of Heavy Industries
Asia Pacific	India	National		Legislation	Production Linked Incentive (PLI) Scheme for EV and EV component manufacturing.	Manufacturing	2021	India, Department of Heavy Industries
Asia Pacific	India	National		Legislation	Funding for charging infrastructure.	EVSE	2023	India, Department of Heavy Industries
Asia Pacific	India	National		Target	National Electric Bus Programme - Ambitious National Electric Bus Program (NEBP) launched in 2022, aiming to deploy an additional 50 000 electric buses over 5 years.	Bus	2022	Government of India
Asia Pacific	India	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2021	Accelerating to Zero Coalition
Southeast Asia	Indonesia	National		Target	Indonesia sets aside USD 455 million to subsidise the sale of 1 million electric motorcycles.	2/3W	2023	Government of Indonesia
Southeast Asia	Indonesia	National		Ambition	Number of charging stations to reach 30 000 units and battery swap stations to reach 67 000 units by 2030.	EVSE	2021	Government of Indonesia
Southeast Asia	Indonesia	National		Legislation	Tax incentive scheme to reduce the cost of electric LDVs and buses with shares of domestic components.	Taxation	2022	Government of Indonesia
Southeast Asia	Indonesia	National		Ambition	2 million passenger EV stock and 13 million electric motorcycle stock by 2030.	LDV	2021	Government of Indonesia
Southeast Asia	Indonesia	National		Ambition	Production targets of 10% of 1.5 million cars to be electric in 2020, 20% out of 2 million units in 2025, 25% out of 3 million in 2030 and 30% out of 4 million in 2035.	Manufacturing	2019	Government of Indonesia
Southeast Asia	Indonesia	National		Ambition	Production targets of 10% of 8 million two-wheeler units to be electric in 2020, 20% of 10 million units in 2025, 25% of 12.5 million in 2030 and 30% of 15 million in 2035.	Manufacturing	2019	Government of Indonesia
Southeast Asia	Indonesia	National		Legislation	Presidential instruction Indonesia requires government offices to procure and use EVs.	Multiple	2022	Government of Indonesia

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
Europe	Ireland	Multi-national		Target	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2022	CALSTART: Drive to Zero MOU
Europe	Ireland	National		Target	35% ZEV share of HDV registrations by 2030, with an interim target of 700 units by 2025.	M/HDV	2023	Government of Ireland
Europe	Ireland	National		Legislation	30% of stock, and 100% of sales passenger LDV sales to be EVs by 2030 (2023 reiteration of 100% sales target and formalisation of 30% stock target, ca. 950 000).	LDV	2023	Government of Ireland
Europe	Ireland	National		Target	Various grants and funding schemes in place to support infrastructure development, aiming for at least 11 HDV charging pools to be installed by 2025.	EVSE	2022	Government of Ireland
Europe	Ireland	National		Legislation	Grants equal to 40-60% of the price difference between the diesel equivalent and the BEV, PHEV, or FCEV model available for the purchase of HDVs.	M/HDV	2021	Government of Ireland
Europe	Ireland	National		Legislation	Grants for BEV public service vehicles, including bonuses for the scrappage of older more polluting vehicles with high mileage.	LDV	2022	Government of Ireland
Europe	Ireland	National		Target	No new diesel buses from 2019, ambition for all urban buses to be low emission by 2035, with 300 and 1 500 electric buses by 2025 and 2030 respectively.	Bus	2019	Government of Ireland
Europe	Ireland	National		Legislation	Reduced toll and motor tax for low emissions vehicles, Value Related Tax (VRT) relief, exemption from Benefit-in-Kind taxes, and Accelerated Capital Allowance.	LDV	2018	Government of Ireland
Europe	Ireland	National		Legislation	Grants towards the purchase of passenger and LCV BEVs.	LDV	2022	Sustainable Energy Authority of Ireland
Europe	Ireland	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Middle East	Israel	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2023	CALSTART: Drive to Zero MOU
Europe	Israel	National		Ambition	5% share of private vehicles sold in 2022 to be EVs, 23% by 2025 and 61% by 2028, with 100% to be EVs by 2030.	LDV	2018	Government of Israel
Europe	Israel	National		Ambition	Ban on all non-EV or non-CNG vehicles after 2030, leading to 1.4 million EV sales by 2030.	LDV	2018	Government of Israel
Europe	Israel	National		Legislation	By 2025, all new municipal buses will be electric, with grants in place to help achieve this.	Bus	2020	Government of Israel
Europe	Israel	National		Target	National Action Plan on Climate Change: Increase stock share of zero-emission urban buses to 50% by 2036 and 100% by 2050.	Bus	2021	Government of Israel
Europe	Israel	National		Target	National Action Plan on Climate Change: Target to reduce average emissions from new LDVs by 95% by 2030 relative to 2020, and by 100% in 2050.	LDV	2021	Government of Israel
Europe	Israel	Multi-national		Ambition	The pledge goal is 100% zero-emission LDV acquisitions of civil government owned and operated fleet, with aspirations for 100% zero-emission M/HDV acquisitions, by no later than 2035. Israel also specifically aims for all new government passenger vehicles from 2022 to be hybrid, and all electric from 2025.	LDV	2022	Zero Emissions Government Fleet Declaration
Europe	Israel	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Europe	Italy	Subnational	Multiple	Legislation	EVs and CNG/LPG cars are exempt from annual ownership tax for 5 years from purchase, and receive a 75% discount on this tax relative to petrol cars from purchase onwards, though exact benefits vary by region.	LDV	2014	Automobile Club d'Italia
Europe	Italy	National		Legislation	30% of the purchase price (up to EUR 3 000) for BEV and PHEV two/three-wheelers. Up to 40% (EUR 4 000) if a Euro 0-3 bike is scrapped.	2/3W	2022	Government of Italy
Europe	Italy	National		Ambition	6 million passenger electric LDV stock (including 4 million BEVs by 2030).	LDV	2019	Government of Italy
Europe	Italy	National		Legislation	85% share of EVs and hybrids in all public HDV purchases by 2030; 30% by 2022 and 50% by 2025 (includes methane and hydrogen in some cases).	M/HDV	2019	Government of Italy

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
Europe	Italy	National		Legislation	85% share of EVs and hybrids in all public LDV by 2030; 30% by 2022 and 50% by 2025 (includes methane and hydrogen in some cases).	LDV	2019	Government of Italy
Europe	Italy	National		Legislation	Grants available towards the purchase of EV trucks.	M/HDV	2022	Government of Italy
Europe	Italy	National		Legislation	Grants towards the purchase of electric LCVs.	LDV	2022	Government of Italy
Europe	Italy	National		Legislation	Phase out new ICE cars by 2035 and LCVs by 2040.	LDV	2022	Government of Italy
Europe	Italy	National		Legislation	Grants towards the purchase of a new BEV, lower amount for PHEVs, with an additional scrappage bonus available.	LDV	2022	Government of Italy
Europe	Italy	National		Legislation	Subsidy in the form of tax relief for installing home chargers.	EVSE	2019	Government of Italy
Asia Pacific	Japan	National		Ambition	100% of car sales to be BEV, PHEV, HEV, or FCEV by 2035, 20-30% of LCV sales by 2030, and electrified vehicles and decarbonised fuel vehicles to account for 100% of sales by 2040 (Green Growth Strategy).	LDV	2021	Government of Japan
Asia Pacific	Japan	National		Ambition	300 000 charging ports including 30 000 public fast chargers (and 1 000 hydrogen stations) by 2030.	EVSE	2023	Government of Japan
Asia Pacific	Japan	National		Target	20-30% share of BEVs and PHEVs, 30-40% share of HEVs and 3% share of FCEVs in passenger LDV sales by 2030.	LDV	2010	Government of Japan
Asia Pacific	Japan	Subnational	Tokyo	Legislation	Subsidies for selected 2/3Ws to reach goal of 100% of new 2/3Ws being petrol-free by 2035.	2/3W	2022	Tokyo Metropolitan Environmental Public Corporation
Asia Pacific	Japan	National		Ambition	Aiming for an advanced introduction of 5 000 electrified M/HDVs in the 2020s.	M/HDV	2021	Government of Japan
Asia Pacific	Japan	National		Legislation	Fuel economy standard: 25.4 km/L for passenger LDVs by 2030, equivalent to a 32.4% improvement compared to 2016 and includes EVs. Well-to-wheel approach adopted that includes grid electricity energy consumption for EVs.	LDV	2020	Government of Japan
Asia Pacific	Japan	National		Legislation	Fuel economy standard: 6.52 or 7.63 km/L (JH25) by 2025 (depending on vehicle class and weight) for heavy commercial vehicles. Target to reduce fuel consumption by 13.4-14.3% compared to 2015 standard.	M/HDV	2019	Government of Japan
Asia Pacific	Japan	National		Legislation	Purchase subsidies for buses, vans and trucks for commercial use.	M/HDV	2022	Government of Japan
Asia Pacific	Japan	National		Legislation	Purchase subsidies for passenger cars.	LDV	2022	Government of Japan
Africa	Kenya	National		Ambition	5% share of electric/hybrid vehicles in total vehicles imported by 2025.	Multiple	2020	Government of Kenya
Africa	Kenya	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Asia Pacific	Korea	National		Target	8.3 million electric and 2.9 million FCEV vehicle stock by 2040.	Multiple	2019	Government of Korea
Asia Pacific	Korea	National		Target	A 2022 manufacturers sales mandate, as a share of annual sales, of 20% for low emission vehicles, and 12% for ZEVs.	Manufacturing	2021	Government of Korea
Asia Pacific	Korea	National		Target	3.62 million passenger BEV and 880 000 passenger FCEV stock by 2030 (and 4 million PHEV+HEV), building upon previous target of 1.13 million passenger BEV stock by 2025 (plus 200 000 passenger FCEV).	LDV	2021	Government of Korea
Asia Pacific	Korea	Subnational	Seoul	Target	Subsidise electric motorcycles with the aim of reaching 100 000 by 2025.	2/3W	2019	Government of Seoul
Asia Pacific	Korea	National		Legislation	Funding available to incentivise EVSE.	EVSE	2022	Government of Korea
Asia Pacific	Korea	National		Target	50% of new sales to be BEV, HEV, PHEV, FCEVs by 2025, and 83% by 2030. 80% of Government operated vehicles to be eco-friendly in 2021, reaching 100% in 2023.	LDV	2021	Government of Korea
Asia Pacific	Korea	National		Legislation	Grants towards the purchase of electric buses.	Bus	2023	Government of Korea
Asia Pacific	Korea	National		Target	Install 500 000 electric chargers by 2025 in homes and workplaces, and 17 000 along highways.	EVSE	2021	Government of Korea

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
Asia Pacific	Korea	National		Legislation	Grants available towards the purchase of private and commercial LDVs, which can be combined with additional local incentives.	LDV	2023	Government of Korea
Eurasia	Kyrgyzstan	National		Legislation	EVs are exempt from import duties and annual registration tax.	Taxation	2019	Government of Kyrgyzstan
Southeast Asia	Laos	National		Target	EVs to make up 30% of vehicle stock by 2030.	Multiple	2021	Government of Laos
Europe	Latvia	National		Legislation	Grants towards the purchase of a new BEV, with a lower amount for PHEVs and used BEVs.	LDV	2021	Government of Latvia
Europe	Latvia	National		Legislation	Private car tax exemption for vehicles with less than 50gCO2/km, lowest rate (EUR 10/month) for company cars.	LDV	2020	Government of Latvia
Europe	Liechtenstein	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2022	CALSTART: Drive to Zero MOU
Europe	Liechtenstein	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Europe	Lithuania	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2022	CALSTART: Drive to Zero MOU
Europe	Lithuania	National		Legislation	Grants towards the purchase of a new BEV, lower amounts for used BEV, as well as higher rates available for LCVs, with scrappage bonuses available.	LDV	2021	Government of Lithuania
Europe	Lithuania	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Europe	Luxembourg	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2021	CALSTART: Drive to Zero MOU
Europe	Luxembourg	National		Legislation	EVs eligible for lowest rate of car tax.	LDV		Government of Luxembourg
Europe	Luxembourg	National		Legislation	Up to EUR 2 000 towards the installation of an eligible charger (EUR 1 200 for a family home, EUR 1 650 for multi-residence complex).	Multiple	2019	Government of Luxembourg
Europe	Luxembourg	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Southeast Asia	Malaysia	National		Legislation	Tax relief for companies investing in EVSE manufacturing, as well as import duty and sales tax exemptions for locally assembled EVs to the end of 2027, and imported EVs to the end of 2025.	Manufacturing	2023	Government of Malaysia
Southeast Asia	Malaysia	National		Ambition	National Automotive Plan 2020 aiming to increase Malaysia's role in producing electrified vehicles.	Manufacturing	2020	Government of Malaysia
Southeast Asia	Malaysia	National		Target	Low Carbon Mobility Blueprint includes plans to establish a progressively reducing emissions target for new LDVs, exhaust emissions regulations, and other measures to improve vehicle efficiency.	Multiple	2021	Government of Malaysia
Southeast Asia	Malaysia	National		Target	Low Carbon Mobility Blueprint includes measures to increase EV adoption, including targets for government and government-led company fleets, incentives for private and commercial EVs, establishment of an e-bus procurement agency, and various manufacturing incentives.	Multiple	2021	Government of Malaysia
Southeast Asia	Malaysia	National		Target	100% (electrified, CNG, LPG or biofuel-fuelled vehicle) stock for all private transport by 2030.	LDV	2017	Government of Malaysia
Europe	Malta	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
North America	Mexico	Subnational	Mexico City	Ambition	Mobility sector emission reduction plan of Mexico city: 30% emission reduction from mobile sources; time-bound partial traffic restrictions, carpooling schemes, LEZ in central city; 10 000 e-bikes and 16 mass bike parking facilities by 2024; 100% electric moto taxis in 2024, incentive scheme; 10% of private cars are EVs or HEVs in 2024.	Multiple	2020	Government of Mexico City
North America	Mexico	National		Ambition	50% of vehicles produced to be ZEV by 2030.	Manufacturing	2022	Government of Mexico
North America	Mexico	National		Legislation	Recognition of lithium as strategic mineral, nationalisation of its value chain. Creation by decree of "Lithium for Mexico" (Litio para Mexico), a decentralised public body.	Manufacturing	2022	Government of Mexico
North America	Mexico	National		Proposal	Deployment of 7M electric LDVs by 2030, 22M by 2040, and 31M by 2050.	LDV	2021	Government of Mexico
North America	Mexico	National		Proposal	Deployment of 338,000 electric HDVs by 2030, 894,000 by 2040, and 987,000 by 2050.	M/HDV	2021	Government of Mexico
North America	Mexico	National		Proposal	50% of LDV sales to be HEVs, PHEVs, and BEVs by 2030, 100% to be PHEVs and BEVs by 2040, and 100% BEVs by 2050	LDV	2021	Government of Mexico
North America	Mexico	National		Legislation	Mexico sets a tax varying largely on the price of the vehicle and an annual vehicle tax, EV owners are exempt from both.	Taxation	2019	Government of Mexico
North America	Mexico	National		Legislation	Import tax exemption for EVs (electric passenger vehicles, light vehicles, cargo vehicles and trolleybuses) as temporary measure until 30 September 2024.	Multiple	2020	Government of Mexico
North America	Mexico	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Africa	Morocco	National		Target	Target of 258 000 electric cars in 2030.	LDV	2022	Government of Morocco
Africa	Morocco	National		Target	Target of 250 000 electric 2/3Ws in 2030.	2/3W	2022	Government of Morocco
Africa	Morocco	National		Target	Target of 2 000 electric buses in 2030.	Bus	2022	Government of Morocco
Africa	Morocco	National		Legislation	Reduced duties, green loans and subsidies, as well as exemptions for EVs from luxury and road taxes.	Taxation	2022	Government of Morocco
Africa	Morocco	National		Target	Target of almost 30 000 charging points for LDVs, 2/3Ws, and buses by 2030.	EVSE	2022	Government of Morocco
Africa	Morocco	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Asia Pacific	Nepal	National		Ambition	20% 4W (i.e. bus and taxi) public passenger vehicle sales, 60% by 2030.	Bus	2021	Government of Nepal
Asia Pacific	Nepal	National		Ambition	25% share of EVs in private passenger vehicle sales (including two-wheelers) by 2025, and 90% by 2030.	LDV	2021	Government of Nepal
Europe	Netherlands	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2021	CALSTART: Drive to Zero MOU
Europe	Netherlands	Multi-national		Ambition	The pledge goal is 100% zero-emission LDV acquisitions of civil government owned and operated fleet, with aspirations for 100% zero-emission M/HDV acquisitions, by no later than 2035.	LDV	2022	Zero Emissions Government Fleet Declaration
Europe	Netherlands	Subnational	Amsterdam	Ambition	Emission-free for all traffic by 2030, including a 2025 target for an extensive emission free zone.	Multiple	2019	City of Amsterdam
Europe	Netherlands	National		Target	100% of public urban bus sales to be ZEV by 2025 and 100% ZEV stock by 2030.	Bus	2019	Netherlands Enterprise Agency
Europe	Netherlands	National		Ambition	100% ZEV share of car sales by 2030.	LDV	2021	Government of the Netherlands
Europe	Netherlands	National		Ambition	15 000 FCEV passenger car stock by 2025, 300 000 by 2030; 50% ZEV share of taxi sales by 2025.	LDV	2019	Government of the Netherlands
Europe	Netherlands	National		Ambition	3 000 heavy-duty FCEV by 2025.	M/HDV	2019	Government of the Netherlands

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
Europe	Netherlands	National		Legislation	Grants available towards the purchase of ZEV trucks, with the amount varying depending on the size of the company purchasing the vehicles.	M/HDV	2022	Government of the Netherlands
Europe	Netherlands	National		Legislation	Grants available, increasing with the size of the bus being purchased.	Bus	2021	Government of the Netherlands
Europe	Netherlands	National		Legislation	Grants available for the purchase or lease of new EV with a range of at least 120 km, lower rates for used EVs.	LDV	2020	Government of the Netherlands
Europe	Netherlands	National		Legislation	Grants towards the purchase of a new light or medium duty commercial vehicle (N1/N2).	LDV	2021	Government of the Netherlands
Europe	Netherlands	National		Legislation	Registration and motor tax exemptions for ZEVs, and reduced rates for low emission vehicles.	Taxation		Government of the Netherlands
Europe	Netherlands	National		Target	Zero emission transport zones to be introduced in 14 cities by 2025.	Multiple	2021	Government of the Netherlands
Europe	Netherlands	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Asia Pacific	New Zealand	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2021	CALSTART: Drive to Zero MOU
Asia Pacific	New Zealand	Multi-national		Ambition	The pledge goal is 100% zero-emission LDV acquisitions of civil government owned and operated fleet, with aspirations for 100% zero-emission M/HDV acquisitions, by no later than 2035.	LDV	2022	Zero Emissions Government Fleet Declaration
Asia Pacific	New Zealand	National		Target	100% of sales of urban buses to be ZEVs by 2025 and 100% of stock by 2035.	Bus	2021	Government of New Zealand
Asia Pacific	New Zealand	National		Target	Increase ZEVs to 30% of the light fleet by 2035.	LDV	2022	Government of New Zealand
Asia Pacific	New Zealand	National		Legislation	Rebates available for ZEV and low-emission vehicles, with reduced rates for used vehicles, also included are fees for higher emitting vehicles (Clean Car Discount).	LDV	2022	Government of New Zealand
Asia Pacific	New Zealand	National		Legislation	Clean Car Import Standard sets ambitious targets and financial penalties on vehicle distributors to reduce average emissions to 63 grammes of CO2/km for passenger cars and 87 grammes for LCVs for vehicles entering New Zealand by 2027, equivalent to a ca. 40% reduction in CO2 emissions by 2025, and a ca. 65% by 2027 (from 2021). Revenues generated are used to provide rebates on BEVs and PHEVs.	LDV	2022	Government of New Zealand
Asia Pacific	New Zealand	National		Target	Comprehensive EV charging strategy including a target for a charging hub every 150-200km on main highways by 2028.	EVSE	2023	Government of New Zealand
Asia Pacific	New Zealand	National		Target	Reduce emissions from freight transport by 35% by 2035.	M/HDV	2022	Government of New Zealand
Asia Pacific	New Zealand	National		Legislation	EVs are exempt from Road User Charges.	Taxation	2009	Government of New Zealand
Asia Pacific	New Zealand	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Central and South America	Nicaragua	National		Legislation	EVs are exempt from import customs duty, selective consumption tax, and value added tax.	Taxation	2022	Government of Nicaragua
Africa	Nigeria	National		Legislation	Nigerian Automotive Industry Development Plan (NADIP) aims to boost local production of vehicles (40% local content target) and promote EVs (30% locally produced vehicles to be electric) by 2032, with incentives including reduced import duties and tax incentives for manufacturers.	Manufacturing	2023	Government of Nigeria

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
Africa	Nigeria	National		Legislation	Vehicle finance scheme aiming to facilitate the adoption of 45 000 passenger cars and 50 000 commercial vehicles per annum.	LDV	2023	Government of Nigeria
Africa	Nigeria	National		Ambition	100% transition to EV by 2060 with interim targets of 1% EV and 2% HEV by 2030, and 60% EV and 20% HEV by 2050.	LDV	2020	Government of Nigeria
Europe	Norway	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2021	CALSTART: Drive to Zero MOU
Europe	Norway	Multi-national		Ambition	The pledge goal is 100% zero-emission LDV acquisitions of civil government owned and operated fleet, with aspirations for 100% zero-emission M/HDV acquisitions, by no later than 2035. Norway specifically aims for all new LDVs to be ZEVs, and that all new city buses are ZEV or biogas by 2025, as well as 75% of new heavy vans and long-distance buses, and 50% of new lorries being ZEV by 2030.	LDV	2022	Zero Emissions Government Fleet Declaration
Europe	Norway	Subnational	Oslo	Legislation	Oslo aims to be the first transport emissions-free city in Europe through a series of ultra low-emission zones. They will also stop the sale of new fossil fuel cars later in the decade, aiming to have all cars zero-emission by 2030.	Multiple	2022	Oslo City Government
Europe	Norway	National		Target	All new city buses to be zero-emission or biogas by 2025, 75% ZEV inter-city buses by 2030.	Bus	2021	Government of Norway
Europe	Norway	National		Ambition	Goods distribution in the biggest city centres to be virtually zero-emissions by 2030.	Multiple	2022	Government of Norway
Europe	Norway	National		Target	All new LDV sales to be zero-emission by 2025.	LDV	2021	Government of Norway
Europe	Norway	National		Target	All new medium-duty and 50% of heavy-duty vehicles to be zero-emission by 2030.	M/HDV	2021	Government of Norway
Europe	Norway	National		Legislation	Norway will introduce value added tax on higher-cost EV purchases from 2023; previously all EV sales were exempt from value added tax.	Taxation	2023	#VALUE!
Europe	Norway	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Asia Pacific	Pakistan	National		Ambition	Changes to tax codes to promote local manufacturing and export potential of EVs, EV parts, and charging equipment.	Manufacturing	2021	Government of Pakistan
Asia Pacific	Pakistan	National		Target	30% share of EVs in LDV sales by 2030, and 90% by 2040.	LDV	2019	Government of Pakistan
Asia Pacific	Pakistan	National		Target	30% share of EVs in truck sales by 2030, and 90% by 2040.	M/HDV	2020	Government of Pakistan
Asia Pacific	Pakistan	National		Target	50% share of bus sales to be EV by 2030, and 90% by 2040.	Bus	2019	Government of Pakistan
Asia Pacific	Pakistan	National		Target	50% share of EVs in two/three-wheeler sales by 2030, and 90% by 2040.	2/3W	2019	Government of Pakistan
Central and South America	Panama	National		Target	Transition of public transport to EV: 10% by 2025, 20% by 2027, and 33% by 2030.	Bus	2022	Government of Panama
Central and South America	Panama	National		Target	Transition of selected public entity vehicles and transport solutions to EV: 10% by 2025, 25% by 2027, 40% by 2030.	Bus	2022	Government of Panama
Asia Pacific	Papua New Guinea	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2023	CALSTART: Drive to Zero MOU
Asia Pacific	Papua New Guinea	National		Target	Range of subsidies for a limited number of charger installations, commercial vehicles and cars.	Multiple	2022	Government of Papua New Guinea
Asia Pacific	Papua New Guinea	National		Target	15% share of EVs in all new vehicle sales by 2030.	Multiple	2022	Government of Papua New Guinea
Central and South America	Paraguay	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Southeast Asia	Philippines	National		Legislation	Hybrids pay 50% of the excise tax and BEVs are exempt.	LDV	2017	Government of the Philippines

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
Southeast Asia	Philippines	National		Legislation	Electric Vehicle Industry Development Act (EVIDA) provides fiscal and non-fiscal incentives to support e-mobility including tax exemptions, and also governs the manufacturing, assembly, importation, construction, installation, maintenance, trade and utilisation, research and development and regulation of EVs.	Manufacturing	2022	Government of the Philippines
Southeast Asia	Philippines	National		Ambition	Deployment of over 200 000, almost 400 000, and over 550 000 new EVs over the period up to 2028, to 2034, and to 2040, respectively, in the Business as Usual case. In the Clean Energy Scenario these figures are almost 1.9 million, over 1.2 million, and almost 1.2 million.	2/3W	2023	Government of the Philippines
Southeast Asia	Philippines	National		Ambition	Deployment of almost 110 000, almost 200 000, and almost 300 000 new EVs over the period up to 2028, to 2034, and to 2040, respectively, in the Business as Usual case. In the Clean Energy Scenario these figures are over 550 000, almost 650 000, and over 850 000 and a greater share of early adoption is HEVs, with later adoption predominately BEVs.	LDV	2023	Government of the Philippines
Southeast Asia	Philippines	National		Ambition	Deployment of 600, almost 1 200, and almost 1 800 new BEVs over the period up to 2028, to 2034, and to 2040, respectively, in the Business as Usual case. In the Clean Energy Scenario these figures are over 2 200, almost 1 500, and over 1 600.	Bus	2023	Government of the Philippines
Europe	Poland	National		Target	600 000 EVs and hybrids by 2030, with an ambition of up to 1 million by 2025.	LDV	2020	Government of Poland
Europe	Poland	National		Target	In cities of more than 100 000 people, ZEVs to make up 100% of new public transport purchases by 2025, and 100% of all public transport vehicles by 2030.	Bus	2020	Government of Poland
Europe	Poland	National		Target	Installation of 49 000 slow and 11 000 fast charging points by 2030, with an ambition for as many as 85 000 and 15 000 respectively.	EVSE	2020	Government of Poland
Europe	Poland	National		Legislation	Grants towards the purchase of ZEVs, with higher amounts available depending on vehicle size, commercial use, and annual mileage.	LDV	2021	Government of Poland
Europe	Poland	National		Legislation	Grant available equal to 30-50% of the eligible costs depending on power rating.	EVSE	2022	Government of Poland
Europe	Poland	National		Legislation	Additional subsidies specifically for the purchase of EVs and chargers by the country's national parks.	Multiple	2022	Government of Poland
Europe	Poland	National		Legislation	Local governments have to ensure at least a 30% share of ZEVs in their LDV fleets by 2025, as well as 30% ZEV (or biomethane) buses in public transport services from 2028. Central government central LDV fleet target is 50% by 2025.	LDV	2018	Government of Poland
Europe	Poland	National		Legislation	Grant of 80-90% of eligible costs of the purchase or lease of an electric bus (BEV/FCEV/e-Trolley), and 50% of the infrastructure cost.	Bus	2020	Government of Poland
Europe	Poland	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Europe	Portugal	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2021	CALSTART: Drive to Zero MOU
Europe	Portugal	National		Ambition	30% EV share of car sales by 2030, 100% by 2050. Diesel to no longer be cost effective by 2030, petrol by 2040, in both cases replaced by EVs.	LDV	2019	Government of Portugal
Europe	Portugal	National		Legislation	BEVs are exempt from payment of vehicle and road tax, reduction of 75% for PHEVs, and 40% for HEVs.	LDV	2017	Government of Portugal
Europe	Portugal	National		Legislation	Grants available for the installation cost plus up to 80% of the cost of a home charger.	EVSE	2017	Government of Portugal
Europe	Portugal	National		Ambition	Hydrogen and electricity to account for almost 100% of heavy duty transport by 2050.	M/HDV	2019	Government of Portugal
Europe	Portugal	National		Legislation	Grants towards the purchase of private BEVs, with higher amounts available for BEV LCVs.	LDV	2017	Government of Portugal
Europe	Romania	National		Ambition	600 000 charging stations, 40 000 of which are fast or semi-fast.	EVSE	2020	Government of Romania
Europe	Romania	National		Ambition	700 000 BEV and P/HEVs by 2030	LDV	2020	Government of Romania

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
Europe	Romania	National		Legislation	Grants towards the purchase of a BEV, lower amounts for a PHEVs, with mandatory scrappage of one car, and various bonuses available.	LDV	2020	Government of Romania
Eurasia	Russia	National		Target	Production of at least 25 000 EVs by 2024, and no less than 10% of total production to be EVs by 2030.	Manufacturing	2021	Government of Russia
Eurasia	Russia	National		Target	State funding for the development of a battery industry, including production of the raw materials.	Manufacturing	2021	Government of Russia
Eurasia	Russia	National		Ambition	At least 9 400 and 2 900 standard and fast charging stations by 2024, and 72 000 and 28 000 respectively by 2030, and up to 144 000 in more ambitious scenarios.	EVSE	2021	Government of Russia
Eurasia	Russia	National		Target	EVs are exempt from tolls.	LDV	2021	Government of Russia
Eurasia	Russia	National		Target	Scenarios (3) envisage a 5-30% share of new sales by 2030, meaning 0.5 - 3.2 million EVs on the road by 2030.	LDV	2021	Government of Russia
Africa	Rwanda	National		Legislation	Tariffs at charging stations are capped at industrial rates, with lower off-peak tariffs; provision of charging stations including planning codes.	EVSE	2021	Government of Rwanda
Africa	Rwanda	National		Legislation	Introduction of a carbon tax, establishment of restricted zones for green transport, and further preferential treatment for EVs.	Taxation	2021	Government of Rwanda
Africa	Rwanda	National		Legislation	VAT, withholding tax, and import duty exemptions for EVs and associated parts/equipment.	Taxation	2021	Government of Rwanda
Africa	Rwanda	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Central and South America	Saint Lucia	National		Legislation	Reduced import duties for hybrid and electric vehicles.	Taxation	2023	Government of Saint Lucia
Europe	Scotland	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2021	CALSTART: Drive to Zero MOU
Africa	Seychelles	National		Target	100% of public bus stock to be electric by 2050.	Bus	2022	Government of Seychelles
Africa	Seychelles	National		Target	30% of new private vehicle sales to be electric by 2030.	LDV	2022	Government of Seychelles
Southeast Asia	Singapore	National		Target	All new buses since 2020 are EV or hybrid, with the aim of phasing out all existing diesel buses by 2040 (100% of stock to be EV by 2040).	Bus	2020	Government of Singapore
Southeast Asia	Singapore	National		Target	Deploy 60 000 EV charging points by 2030, 40 000 in public car parks and 20 000 in private premises.	EVSE	2020	Government of Singapore
Southeast Asia	Singapore	National		Target	No new diesel car or taxi registrations from 2025, and all new registrations to be EV, PHEV, or FCEV by 2030.	LDV	2021	Government of Singapore
Southeast Asia	Singapore	National		Legislation	Suite of rebates, reduced registration costs, and lower taxes applied to EVs and petrol hybrids.	LDV	2021	Government of Singapore
Southeast Asia	Singapore	National		Legislation	Enhanced Commercial Vehicle Emissions and Early Turnover Schemes which provides incentives and discounted registration costs to owners replacing their older more polluting vehicles.	Multiple	2022	Government of Singapore
Central and South America	Sint Maarten	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2021	CALSTART: Drive to Zero MOU
Europe	Slovak Republic	National		Legislation	Grants available for BEVs and PHEVs. In addition to cars, light-commercial vehicles/vans up to 3.5 tonnes also qualify. The subsidy programme operates on a first-come, first-served basis, with both EVs and PHEVs covered by the same subsidy pool; the application process occurs when and where the vehicles are purchased; there are no vehicle price restrictions.	LDV	2023	Government of Slovak Republic
Europe	Slovak Republic	National		Legislation	Slovak Republic automotive EV action plan includes financial measures to support EVs and EVSE and legislative measures in the areas of taxation and infrastructure, among other measures.	Multiple	2023	Government of Slovak Republic

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
Europe	Slovenia	National		Target	No new sales of LDVs with CO2 emissions above 100 g CO2/km by 2025, and 50 g CO2/km by 2030.	LDV	2017	Government of Slovenia
Europe	Slovenia	National		Legislation	Grant towards the purchase of a new BEV.	LDV	2017	Government of Slovenia
Europe	Slovenia	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Asia Pacific	Solomon Islands	National		Target	Targets for the installation of both slow and fast chargers between 2022 and 2035.	EVSE	2022	Government of the Solomon Islands
Asia Pacific	Solomon Islands	National		Target	EV sales share targets of 20%, 70%, and 100% by 2025, 2030, and 2035 for two-wheelers, and 100% for three-wheelers from 2025.	2/3W	2022	Government of the Solomon Islands
Asia Pacific	Solomon Islands	National		Target	EV sales share targets of 20%, 30%, and 40% by 2025, 2030 and 2035. Targets are higher for taxis, and lower for LCVs.	LDV	2022	Government of the Solomon Islands
Asia Pacific	Solomon Islands	National		Target	EV sales share targets of 20%, 50% and 70% by 2025, 2030 and 2035.	Bus	2022	Government of the Solomon Islands
Asia Pacific	Solomon Islands	National		Target	EV sales share targets of 5%, 10% and 15% by 2025, 2030 and 2035.	M/HDV	2022	Government of the Solomon Islands
Africa	South Africa	National		Target	Add 40 solar powered public EV charging stations per annum.	EVSE	2018	Government of South Africa
Africa	South Africa	National		Legislation	Specific investment incentives for the production of electric and hydrogen-powered vehicles under the Automotive Production Development Programme.	Manufacturing	2024	Government of South Africa
Africa	South Africa	National		Target	Convert 5% of the public and national fleet to cleaner alternative fuel and efficient technology vehicles by 2025, with annual increase of 2% thereafter.	Bus	2018	Government of South Africa
Europe	Spain	National		Ambition	100 000 charging points to support 250 000 EVs by 2023.	EVSE	2020	Government of Spain
Europe	Spain	National		Legislation	Grants available for vehicle purchase depending on vehicle and company size, as well as for charging infrastructure.	M/HDV	2021	Government of Spain
Europe	Spain	National		Proposal	Fuel supply facilities are obliged to install EV chargers, with limited exceptions.	EVSE	2021	Government of Spain
Europe	Spain	National		Proposal	Grants of 30 - 55% for businesses installing charging infrastructure.	EVSE	2021	Government of Spain
Europe	Spain	National		Proposal	Grants of 70 - 80% for non-commercial communities and the self-employed installing charging infrastructure.	EVSE	2021	Government of Spain
Europe	Spain	National		Proposal	No sales of passenger LDVs that emit CO2 at the tailpipe by 2040.	LDV	2021	Government of Spain
Europe	Spain	National		Legislation	Grants towards the purchase of EVs, with bonuses for scrapping a vehicle more than 7 years old, for self-employed drivers in municipalities of fewer than 5 000 people, and for those with reduced mobility.	LDV	2021	Government of Spain
Europe	Spain	National		Target	National Energy and Climate Plan: 5 million EVs by 2030 (across all modes); interim goal of 250 000 by 2023.	Multiple	2021	Government of Spain
Europe	Spain	National		Proposal	Creation of low-emissions zones in municipalities with more than 50 000 people, covering 70% of Spanish cities.	Multiple	2021	Government of Spain
Europe	Spain	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Asia Pacific	Sri Lanka	National		Target	Passenger LDV fleet to be EVs by 2040.	LDV	2017	Government of Sri Lanka
Asia Pacific	Sri Lanka	National		Target	All state-owned vehicles to be electric by 2025 (across all modes).	Multiple	2017	Government of Sri Lanka
Europe	Sweden	Multi-national		Ambition	The pledge goal is 100% zero-emission LDV acquisitions of civil government owned and operated fleet, with aspirations for 100% zero-emission M/HDV acquisitions, by no later than 2035.	LDV	2022	Zero Emissions Government Fleet Declaration

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
Europe	Sweden	National		Legislation	A grant of 20% of the purchase price is available for public transport authorities, municipalities, or limited companies; 40% of the difference between the EV bus purchase price and a comparable diesel bus for private transport companies.	Bus	2016	Government of Sweden
Europe	Sweden	National		Proposal	Ban on new petrol or diesel cars sales after 2030.	LDV	2019	Government of Sweden
Europe	Sweden	National		Proposal	Expansion of 2 400 km of electric road by 2037.	M/HDV	2021	Government of Sweden
Europe	Sweden	National		Ambition	Public and private pledges (accompanied by action plans) to electrify regional freight transport under the Commission for Electrification.	M/HDV	2021	Government of Sweden
Europe	Sweden	National		Legislation	Subsidy scheme for electric light commercial vehicles (SEK 50 000 gradually declining until phase-out at the end of 2025), as well as support for small- and medium-sized companies to invest in emission-free heavy trucks (covering up to 25% of the cost).	LDV	2024	Government of Sweden
Europe	Sweden	National		Legislation	Grants of up to 50% of the cost of the charging station. This grant does not apply to private citizens, public charging infrastructure or charging stations required to be installed by law, other constitution of conditions in permits. The grant applies to charging stations for BEV for residents or employees.	EVSE	2020	Government of Sweden
Europe	Sweden	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Europe	Switzerland	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2021	CALSTART: Drive to Zero MOU
Europe	Switzerland	National		Target	4% of new vehicles to be BEV and PHEV by 2030, 28% BEV by 2050. FCEVs to make up 8% of sales by 2025, 19% by 2050.	M/HDV	2020	Swiss Federal Government
Europe	Switzerland	National		Ambition	Sales shares of 28% in 2025, 60% in 2030, and 100% from 2040 for BEV, PHEV, and FCEV. BEV and FCEV only from 2050.	LDV	2020	Swiss Federal Government
Europe	Switzerland	National		Proposal	Legislative revision including support for recharging stations, an extension of tax exemptions for electric and hydrogen trucks until 2030, vehicle-to-grid incentives, and the possible adoption of the EU LDV CO2 emission standards, expected to come into force in 2025.	Multiple	2023	Swiss Federal Government
Europe	Switzerland	National		Ambition	50% of new registrations to be BEV/PHEV, and 20 000 charging stations by 2025.	LDV	2022	Roadmap Elektromobilität (a public-private initiative)
Eurasia	Tajikistan	National		Legislation	Electric transport development programme aims to create charging and maintenance points for EVs, facilitate battery disposal, and establish production for EVs and spare parts.	Multiple	2022	Government of Tajikistan
Eurasia	Tajikistan	National		Legislation	10 year exemption from taxes and custom fees for EV imports.	Taxation	2023	Government of Tajikistan
Southeast Asia	Thailand	National		Legislation	EV3.5 subsidy scheme providing incentives for EVs, with lower rates than previous schemes and a greater focus on local production.	Multiple	2023	Government of Thailand
Southeast Asia	Thailand	National		Ambition	30% of total vehicle production (two/three-wheelers, LDVs and urban buses) to be EVs by 2030.	Manufacturing	2020	Government of Thailand
Southeast Asia	Thailand	National		Ambition	30% share of ZEVs in domestic LDV production by 2030, 50% by 2035. 35% share of ZEVs in domestic bus production by 2025, 50% by 2030 and 85% by 2035.	Manufacturing	2021	Government of Thailand
Southeast Asia	Thailand	National		Ambition	622 000 EV two/three-wheelers by 2025, and 8.75 million by 2035.	2/3W	2021	Government of Thailand
Southeast Asia	Thailand	National		Ambition	12 000 public fast charging stations by 2030 and 1 450 battery swapping stations.	EVSE	2021	Government of Thailand
Southeast Asia	Thailand	National		Ambition	31 000 EV buses/trucks by 2025, and 430 000 buses/trucks by 2035.	M/HDV	2021	Government of Thailand

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
Southeast Asia	Thailand	National		Ambition	402 000 EV LDVs by 2025, 6.4 million by 2035.	LDV	2021	Government of Thailand
Southeast Asia	Thailand	National		Legislation	Tax reductions and exemptions for EVs to promote their deployment.	Taxation	2022	Government of Thailand
Asia Pacific	Tonga	National		Target	10% of new LDVs to be electric by 2030.	LDV	2020	Government of Tonga
Central and South America	Trinidad and Tobago	National		Legislation	Removal of all taxes and duties on the importation of EVs, with an age limit of two years on used imports.	Taxation	2021	Government of Trinidad and Tobago
Africa	Tunisia	National		Legislation	Customs duties rates are reduced to 10% and value-added tax rate to 7% levied on electric car chargers.	EVSE	2022	Government of Tunisia
Europe	Türkiye	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2021	CALSTART: Drive to Zero MOU
Europe	Türkiye	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
Central and South America	Turks and Caicos Islands	National		Legislation	Ban on the import of vehicles more than 10 years old.	Multiple	2021	Turks and Caicos Government
Europe	Ukraine	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2022	CALSTART: Drive to Zero MOU
Europe	Ukraine	National		Proposal	Requires the exclusive use of electric buses from 2030 onwards, with tenderers for the provision of such services required to have 20% electric buses in their fleets by 2025, 40% by 2027, and 80% by 2029.	Bus	2021	Government of Ukraine
Europe	Ukraine	National		Proposal	Ban on the import of used diesel buses and cars from 2027, and the ban on new and used petrol and diesel vehicles from 2030.	Multiple	2021	Government of Ukraine
Middle East	United Arab Emirates	Subnational	Dubai	Ambition	EV Green Charger Initiative: Installing charging infrastructure across Dubai (no known specific targets).	EVSE	2020	Government of Dubai
Middle East	United Arab Emirates	National		Target	Increase the share of EVs to 50% of the total fleet by 2050.	Multiple	2023	#VALUE!
Middle East	United Arab Emirates	Subnational	Abu Dhabi	Legislation	Regulatory policy that sets out the fundamental principles for ownership, installation and management of EVSE, the electricity supply to EVSE, and pricing mechanisms.	EVSE	2022	Government of Dubai
Middle East	United Arab Emirates	Subnational	Dubai	Proposal	Increased procurement targets of EVs and HEVs at government organisations to 20% in 2025 and 30% in 2030.	Multiple	2020	Government of Dubai
Europe	United Kingdom	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2021	CALSTART: Drive to Zero MOU
Europe	United Kingdom	National		Proposal	Up to USD 1.2 billion Automotive Transformation Fund (ATF) commitment to support the electrification of UK vehicles and their supply chains as part of the Net Zero Strategy.	Manufacturing	2021	Government of the United Kingdom
Europe	United Kingdom	National		Proposal	Regulations to improve the customer experience, in particular with regards to payments and reliability.	EVSE	2023	Government of the United Kingdom
Europe	United Kingdom	National		Ambition	Electric vehicle infrastructure strategy: Around 300 000 public chargers expected as a minimum by 2030, and 6 000 fast chargers by 2035.	EVSE	2022	Government of the United Kingdom
Europe	United Kingdom	National		Proposal	End the sale of all non-ZEV HGVs under 26 t gross vehicle weight from 2035, and of all new non-ZEV HGVs from 2040.	M/HDV	2021	Government of the United Kingdom
Europe	United Kingdom	National		Legislation	From April 2025, EVs will begin to pay excise duty, initially at the lowest rates; exemption from the "Expensive Car Supplement" will also end in April 2025.	Taxation	2022	Government of the United Kingdom
Europe	United Kingdom	National		Legislation	Grant schemes for EV charging infrastructure include the EV chargepoint grant, Workplace Charging Scheme, and EV Homecharge Scheme, among others.	EVSE	2016	Government of the United Kingdom

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
Europe	United Kingdom	National		Legislation	A grant of 20% available for vehicles with at least 50% fewer emissions than a conventional Euro VI vehicle and 96 km zero emission range.	M/HDV	2021	Government of the United Kingdom
Europe	United Kingdom	National		Legislation	Grants towards the purchase of LCVs and taxis.	LDV	2021	Government of the United Kingdom
Europe	United Kingdom	National		Legislation	ZEV mandate: 80% of new cars and 70% of new vans sold in Great Britain will be zero emission by 2030, increasing to 100% by 2035.	LDV	2024	Government of the United Kingdom
Europe	United Kingdom	National		Legislation	As part of the Advanced Manufacturing Plan, the Government announced USD 2.4 billion of new capital and R&D funding to 2030, boosting the United Kingdom's competitiveness and unlocking strategic investments in the UK automotive industry.	Manufacturing	2023	Government of the United Kingdom
Europe	United Kingdom	National		Ambition	Purchase of 4 000 ZEV buses as part of the Bus Back Better strategy.	Bus	2021	Government of the United Kingdom
Europe	United Kingdom	National		Ambition	Regulations in 2021 to mandate EV charge point provision in new homes.	EVSE	2021	Government of the United Kingdom
Europe	United Kingdom	National		Target	Electrifying 100% of the central government fleet by 2027, ahead of the original 2030 target.	Multiple	2021	Government of the United Kingdom
Europe	United Kingdom	Multi-national		Ambition	Work towards all sales of new cars and vans being zero emission globally by 2040, or by no later than 2035 in leading markets.	LDV	2022	Accelerating to Zero Coalition
North America	United States	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2022	CALSTART: Drive to Zero MOU
North America	United States	Multi-national		Ambition	The pledge goal is 100% zero-emission LDV acquisitions of civil government owned and operated fleet, with aspirations for 100% zero-emission M/HDV acquisitions, by no later than 2035. The United States also specifically aims for 100% of all federal government acquisitions to be ZEV by 2035, for LDVs the target date is 2027.	LDV	2022	Zero Emissions Government Fleet Declaration
North America	United States	Subnational	Washington	Legislation	100% ZEV share of LDV sales by 2030.	LDV	2022	Washington State Legislature
North America	United States	Subnational	Oregon	Legislation	Grants and incentives towards the purchase or lease of new BEVs and PHEVs.	LDV	2023	Oregon Department of Environmental Quality
North America	United States	Subnational	Vermont	Legislation	Grants and incentives towards the purchase of new and used EVs and EVSE.	LDV	2022	Drive Electric Vermont
North America	United States	Subnational	New York	Legislation	100% of in-state sales of M/HDV will be zero-emissions by 2045.	M/HDV	2021	New York State Senate
North America	United States	Subnational	New York	Legislation	100% of in-state sales of passenger cars or light duty trucks will be zero-emissions by 2035.	LDV	2021	New York State Senate
North America	United States	Subnational	New York	Legislation	Subsidy in the form of a voucher towards the cost of a zero emission truck, or port cargo handling equipment.	M/HDV	2020	New York State
North America	United States	Subnational	New York	Legislation	Subsidy in the form of a voucher towards the cost of a zero emission bus, depending on vehicle class and location.	Bus	2020	New York State
North America	United States	Subnational	New York	Legislation	100% of in-state sales of off-road vehicles and equipment will be zero-emissions by 2035.	Multiple	2021	New York State Senate
North America	United States	Subnational	New Jersey	Legislation	85% EV share of LDV sales by 2040.	LDV	2020	New Jersey State Senate
North America	United States	Subnational	Multiple	Ambition	30% of all sales of M/HDVs be zero emission by 2030, 100% by 2050 (California, Colorado, Connecticut, Washington D.C, Hawaii, Maine, Maryland, Massachusetts, New Jersey, New York, Carolina, Oregon, Pennsylvania, Rhode Island, Vermont, Washington, Virginia, Nevada).	M/HDV	2020	NESCAUM
North America	United States	Subnational	Multiple	Legislation	52 states and districts have submitted their plans and funding estimates for the National Electric Vehicle Infrastructure (NEVI) Program with budgets changing annually (totalling an estimated USD 855 million for 2024).	EVSE	2022	Joint office of Energy and Transportation
North America	United States	Subnational	Massachusetts	Legislation	100% share of ZEVs in passenger LDV sales by 2035.	LDV	2020	State of Massachusetts

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
North America	United States	Subnational	California	Legislation	250 000 electric vehicle charging stations by 2025 (as indicated in the Executive Order B-48-18).	EVSE	2018	California Public Utilities Commission
North America	United States	Subnational	California	Legislation	Advanced Clean Cars Rule II (ACC-II) has set a target for 100% ZEVs in LDVs by 2035, starting with 36% sales requirement in 2026.	LDV	2022	California Air Resources Board
North America	United States	Subnational	California	Proposal	Advanced Clean Fleets (ACF) proposes to reach 100% zero-emission drayage trucks, last mile delivery, and government fleets by 2035; 100% zero-emission refuse trucks and local buses by 2040; 100% zero-emission capable utility fleets by 2040.	M/HDV	2021	California Air Resources Board
North America	United States	Subnational	California	Legislation	Advanced Clean Trucks Rules require 40 - 75% of sales by manufacturers (varied by vehicle class and weight) to be ZEV by 2035 (increasing targets from 2024).	M/HDV	2020	California Air Resources Board
North America	United States	Subnational	California	Legislation	From 2029, 100% of new purchases by transit agencies must be zero emission buses, with a goal of full transition by 2040.	Bus	2019	California Air Resources Board
North America	United States	Subnational	California	Legislation	Incentives for ZEV infrastructure equipment for HDV battery electric and hydrogen fuel cell vehicles in California.	EVSE	2021	CALSTART
North America	United States	Subnational	California	Legislation	Grant towards the purchase of a new electric truck.	M/HDV	2009	California Air Resources Board
North America	United States	Subnational	California	Legislation	Grants towards the purchase of a new electric bus.	Bus	2009	California Air Resources Board
North America	United States	Subnational	California	Legislation	USD 1 billion funding for transportation electrification programme with 70% for M/HDV charging infrastructure and 30% for LDV charging in Municipal Utility Districts.	EVSE	2022	California Public Utilities Commission
North America	United States	Subnational	California	Legislation	100% of off-road vehicles and equipment will be zero-emission by 2035.	Multiple	2020	State of California
North America	United States	Subnational	California	Legislation	Low Carbon Fuel Standard sets annual carbon intensity (CI) targets. Transport fuel suppliers generate credits for fuels below the CI target (including electricity and hydrogen). The aim is to reduce the CI of the transportation fuel pool by at least 20% by 2030 compared to 2010.	Multiple	2009	California Air Resources Board
North America	United States	National		Legislation	Fuel economy standards that will require a fleet-wide industry average of roughly 49 mpg (Corporate Average Fuel Economy for model years 2024-26).	LDV	2023	Government of the United States
North America	United States	National		Legislation	National Zero-Emission Freight Corridor Strategy is a phased approach starting with establishing hubs at rail, freight, and airports, expanding the network, and aiming for complete coverage between 2035 and 2040.	EVSE	2024	Government of the United States
North America	United States	National		Legislation	Standards that would require an industry-wide fleet average of approximately 49 mpg for passenger cars and light trucks in model year 2026, by increasing fuel efficiency by 8% annually for model years 2024 and 2025, and 10% annually for model year 2026.	LDV	2022	Government of the United States
North America	United States	National		Legislation	Revised fuel economy standards for model years 2027 onwards, with projected reductions in CO2 emissions of 50% for LDVs and 40% for MDVs in 2032 compared to 2027.	LDV	2024	Government of the United States
North America	United States	National		Legislation	To qualify for federal tax credits, a certain share of the critical minerals used to produce the battery must be extracted, processed or recycled in the United States, or come from countries with which the United States has free trade agreements, and certain shares of the value of the battery must have been manufactured or assembled in North America (Clean Vehicle Credit of the Inflation Reduction Act).	Manufacturing	2022	Government of the United States
North America	United States	National		Legislation	To qualify for federal tax credits, the vehicles must have undergone final assembly in North America, be made by a qualified manufacturer, and have a battery capacity of at least 7 kWh, and a gross vehicle weight of less than 6.5 t (Clean Vehicle Credit of the Inflation Reduction Act).	Manufacturing	2022	Government of the United States

Global EV Outlook 2024 Policy Explorer

Region	Country	Policy Level	Province	Policy Type	Key policy measures and targets	Category	Year	Source
North America	United States	National		Legislation	USD 6 billion grant programme, including USD 3 billion to fund the domestic production of materials needed for the EV supply chain, including the refining of nickel, lithium and cobalt, as well as rare earth metals (Infrastructure Investment and Jobs Act).	Manufacturing	2022	Government of the United States
North America	United States	National		Ambition	50% of all new vehicles sold to be zero-emissions in 2030.	LDV	2021	Government of the United States
North America	United States	National		Legislation	Funding towards purchasing or leasing of low or no emissions buses (up to 85% of vehicle costs, up to 90% of infrastructure costs).	Bus	2016	United States, Federal Transit Administration
North America	United States	National		Legislation	Revision of existing standards to reduce GHG emissions from HDVs from model year 2027 through 2032, reductions of 25% (sleeper cab) to 60% (light-heavy vocational vehicles) across segments (Phase 3 CO2 emission standard).	M/HDV	2024	United States, Environmental Protection Agency
North America	United States	National		Legislation	Eligible commercial projects can receive 30% of the project cost, with fixed grants available for residential projects, both in the form of tax credits (Alternative Fuel Infrastructure Tax Credit).	EVSE	2023	Government of the United States
North America	United States	National		Legislation	Grants and/or rebates available for the deployment of clean HDVs, including vehicles, infrastructure, and training (Clean Heavy-Duty Vehicle Program).	M/HDV	2023	Government of the United States
North America	United States	National		Legislation	Subsidies in the form of tax credits for commercial EVs (Commercial Clean Vehicle Credit).	M/HDV	2023	Government of the United States
North America	United States	National		Legislation	Support to reach goal of 500 000 chargers by 2030 through USD 5 billion in formula funding for states, as well as USD 2.5 billion for a competitive grant programme (Infrastructure Investment and Jobs Act).	EVSE	2021	Government of the United States
North America	United States	National		Legislation	USD 46 million of funding for EV charging network enhancement.	EVSE	2024	Government of the United States
North America	United States	National		Legislation	USD 131 million of funding to enhance battery supply chain and EV innovation.	Manufacturing	2024	Government of the United States
North America	United States	Subnational		Ambition	Multistate MoU with a target of 30% ZEV sales for all new commercial M/HDV by 2030 and 100% by 2050 in 15 states (California, Colorado, Connecticut, Hawaii, Maine, Maryland, Massachusetts, New Jersey, New York, North Carolina, Oregon, Pennsylvania, Rhode Island, Vermont and Washington) and the District of Columbia.	M/HDV	2020	Multi-State Zero Emission Medium- and Heavy-Duty Vehicle Initiative
Central and South America	Uruguay	Multi-national		Ambition	30% ZEV sales in M/HDVs by 2030, 100% by 2040.	M/HDV	2021	CALSTART: Drive to Zero MOU
Eurasia	Uzbekistan	National		Ambition	2 500 charging stations by 2025.	EVSE		Government of Uzbekistan
Eurasia	Uzbekistan	National		Legislation	Exemptions and/or reductions of various taxes and duties for EVs.	Taxation	2021	Government of Uzbekistan
Southeast Asia	Viet Nam	National		Proposal	Decree No. 57/2020/ND-CP: Encourage the production of environmentally friendly vehicles (fuel-saving cars, HEVs, vehicles using biofuels, EVs), meeting the requirements of emission standards according to the approved roadmap. In addition, to support the development of the country's automobile industry, 0% preferential import tax rates will be levied on raw materials and components used for automobile manufacturing and assembly that has not yet been domestically made, from 2020 to 2024.	Manufacturing	2016	Government of Vietnam
Southeast Asia	Viet Nam	National		Target	Net zero greenhouse gas emissions in the transport sector by 2050, with a goal of 100% of road transport using electricity and green energy.	Multiple	2022	Government of Vietnam
Southeast Asia	Viet Nam	National		Legislation	Reduced excise tax for BEV cars and buses up to 24 passengers and LCVs (from 15% current tax rate), rates reduced to 2-3% (depending on model), to increase to 11% after 2027.	Taxation	2022	Government of Vietnam