TURKEY
ELECTRIC VEHICLES OUTLOOK
“Turkey Electric Vehicles Outlook” supports e-mobility growth posing multiple benefits for Turkey with solid recommendations

### WHY TEVO?
- Strong global growth in e-mobility
- Important steps in regulatory framework and investments in Turkey
- Opportunities to support a more secure and clean energy future for Turkey through e-mobility development
- An independent, participatory and exemplary study

### HOW TEVO?
- Building upon “Turkey Energy Outlook” & an holistic energy model by IICEC
- Detailed accounting of Turkish energy and transportation sectors
- Reflecting global and regional developments, Turkey’s policy choices, market development and technological advancements
- Supported by independent research, quantitative analyses and market insights
- “Government-Industry-Academia” success triangle
Different growth and developments pathways are analyzed in two IICEC Scenarios

Electric Vehicles Market Share in New Sales in the Scenarios * (2020-2030, %)

Electric Vehicles Stock Development in the Scenarios (2020-2030)

*Passenger cars and light duty vehicles
Energy demand in road transportation becomes more efficient and less oil-dependent by means of electrification and other solutions.

Energy efficiency in transportation enhances by means of improvements in fuel economy and modal changes in addition to significant efficiency gains by electric vehicles.
Savings in the oil bill is twice the investment amount required to fuel electric vehicles based on renewable energy.

High Growth Scenario shows 2.5 billion USD reduction in Turkey’s oil bill by means of 1.3 billion USD renewable energy based electricity generation investment (in 2021 real prices).
High Growth Scenario strongly supports a net-zero emissions future and clean energy transition

High Growth Scenario achieves 10 million tons of CO₂-eq emission reductions until 2030 while road transportation GHG emissions are peaking before 2030.
A user-oriented development of a 2 million electric vehicle park until 2030 can be achieved by >200,000 public charging points.

Market driven and technological solutions in charging and grid infrastructures are key to realize multiple advantages of e-mobility with maximum societal benefits.
TEVO presents improvement areas and opportunities to realize high potential in e-mobility with multiple benefits

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Clean energy oriented policy targets and roadmaps
Determining concrete, realistic, and achievable policy targets in line with the 2053 net-zero target and clean energy transformation, and implementing guiding and supporting mechanisms.

Ensuring the sustainability of this transformation through the development of green energy resources.

Developing a holistic e-mobility ecosystem that focuses on the environment and technology, through public, private, and academic cooperation and coordination to maximize societal benefits.

Strengthening the individual and corporate entrepreneurship ecosystem and human resources potential to help position Turkey as a regional and global actor in EVs and e-mobility.

Accelerating R&D and domestic production in technologies that offer high value propositions such as digitalization, smart systems, and energy storage.
Determining concrete, realistic, and achievable policy targets in line with the 2053 net-zero target and clean energy transformation, and implementing guiding and supporting mechanisms

- Implementing a roadmap that will ensure reaching at least 2 million EVs and over 200,000 public charging sockets by 2030,
- Reflecting energy imports and environmental performance related benefits of the EVs while devising support mechanisms
02 Ensuring the sustainability of this transformation through the development of green energy resources
Developing a holistic e-mobility ecosystem that focuses on the environment and technology, through public, private, and academic cooperation and coordination to maximize societal benefits.

- Grasping technology-oriented opportunities for the competitive transformation of the automotive industry,
- Planning and operating charging points and electricity distribution grids most efficiently,
- Disseminating innovative financing as well as next-generation, market based, and user-oriented business models,
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THANK YOU

Please read the QR code with your mobile phone for detailed information.