Strategic Technology and Market Analysis of Electric Vehicle Charging Infrastructure in Europe

Description: This Frost & Sullivan research service titled Strategic Technology and Market Analysis of Electric Vehicle Charging Infrastructure in Europe provides technology roadmaps, market size overview, OEM strategies and business model overview. In this research, Frost & Sullivan’s expert analysts thoroughly examine the following technologies: Level 1 charging, level 2 fast charging, level 3 rapid DC-DC charging and inductive charging.

Market Overview

Prospect of Over 2 Million Public Charging Points by 2017 Bode Well for European EV Charging Infrastructure Market

Electric vehicles (EVs) have gained significant attention over the last few years from various European governments as they look to promote the deployment of EV charging infrastructure. There are strong indicators that the EV market will take off in an unprecedented way - over 2 million public charging points are anticipated by 2017 in Europe with 3 per cent of this being accounted for by DC-DC rapid and inductive charging concepts. The market is poised to grow from less than 10,000 public charging points in 2010 to close to 2 million public charging points by 2017. This will largely be motivated by local government initiatives, including several incentives, aimed at boosting the expansion of public charging infrastructure for EVs. “European governments are expected to budget about €700 million over the next seven years for charging stations,” notes the analyst of this research. “This will be one of the main drivers behind the exponential growth in public charging infrastructure for EVs.” The approximate investment over the next seven years is likely to be about € 5 billion for building EV infrastructure in Europe in relation to charging. The ratio of the number of cars to charging stations in Europe stands currently at 2.5, dropping to 1.8 by 2017.

The rate of growth of public charging infrastructure in Europe is very high, principally due to local government initiatives in different countries. “Local governments are granting customers a variety of incentives to purchase an EV,” remarks the analyst. “Such incentives include discounts on the purchase price, tax reduction or exemption, and other advantages such as no congestion charge, free parking, and use of exclusive lanes, among others.” There are many other initiatives such as initiating infrastructure deployment, which can be financed by governments. For instance, the French Government has allocated €400 million for infrastructure. Other approaches include playing a role as a partner in different projects, such as the Portuguese Government partnering with Renault-Nissan. Providing funding to private projects for infrastructure installation is another method being adopted by governments to encourage EV adoption.

DC- DC Fast Charging to Show Way Forward

Slow charging is the most widely available option at present. This method requires six to eight hours for a vehicle to fully charge (80 per cent) and represents an infrastructure problem. “Manufacturing and installation of a single charging station can be as high as €6,000, implying the need for sizeable investments to equip an entire city with charging stations,” states the analyst. “Moreover, 6 to 8 hours of slow charging means more charging stations are required to ensure availability at all times.”

Fast charging will help resolve this issue. However, at the moment, this method is expensive and not widely available. In addition, it is presumed not to be entirely safe for users to handle. “The adoption of concepts such as DC-DC fast charging is critical to ensure the dramatic decrease of charging duration,” concludes the analyst. “A DC-DC charging station may eventually produce its own energy supply from renewable sources, offering an added advantage.”

Market Sectors

Expert Frost & Sullivan analysts thoroughly examine the following regions in this research:

- The United Kingdom
Technology

The following technologies are covered in the research:

- Level 1 charging
- Level 2 fast charging
- Level 3 rapid DC-DC charging
- Inductive charging

Contents:

1. Definition and Scope
   - 1.1 Definitions – Charging Station Levels
   - 1.2 Definitions – Charging Stations
   - 1.3 Definitions – EV Charging Stations Locations
   - 1.4 Base Essentials of a Charging Station
   - 1.5 Communication Possibilities between Vehicle and Charge Spot (V2C)

2. Executive Summary
   - 2.1 Top Level Strategic Fact Sheet
   - 2.2 Roadmap of Charging Station Infrastructure for Electric Vehicles
   - 2.3 EV public charge station scenario analysis
   - 2.4 European Charging Station Type Forecast
   - 2.5 Country Level Charging Station Type Forecasts
   - 2.6 Charging Infrastructure Specifications and Features
   - 2.7 European EV Charging Infrastructure Mix
   - 2.8 Characteristics of DC – DC Rapid (Level 3)
   - 2.9 Options for Financing
   - 2.10 Representation of Communication Scope and Standards of a Charging Interface
   - 2.11 Funding Support
   - 2.12 European EV Charging Station Facts
   - 2.13 Technology Investment Analysis
   - 2.14 Country Level Specifications of Level 1 and 2 Charging
   - 2.15 Market Opportunity Map
   - 2.16 Future Trends in Charging Station Infrastructure

3. Total European EV Charging Station Technology and Market Analysis
   - 3.1 Electric Vehicles Charging Infrastructure Product Lifecycle Analysis
   - 3.2 Electric Vehicle Commercial Charging Infrastructure
   - 3.3 Charging Type Analysis
   - 3.4 Charging Power and Time Roadmap
   - 3.5 Charging Infrastructure Product Development Analysis
   - 3.6 Charging Infrastructure EcoSystem
   - 3.7 Technology Gap Analysis
   - 3.8 EV Charging Infrastructure Key Market Drivers and Restraints
   - 3.9 EV Charging Infrastructure Industry challenges
   - 3.10 EV Charging Infrastructure Pros and Cons
   - 3.11 EV Charging Infrastructure Scenario Analysis
   - 3.12 EV Charging Infrastructure Market Forecasts by Charging Station Type
   - 3.13 EV Charging Infrastructure Cost and Revenue Model
   - 3.14 EV Charging Infrastructure – Nissan Case Study

4. In-depth Analysis of Charging Infrastructure Market in Europe
   - 4.1 Geographical Scope of Analysis
   - 4.2 Snapshot of the Charging Station Infrastructure in Europe
   - 4.3 Relationships within EV Infrastructure – Europe
   - 4.4 EV Charging Infrastructure Manufacturers and their Presence in Europe
- 4.5 Charging Infrastructure Country Level Analysis of Charging Types
- 4.6 Charging Infrastructure Growth in UK
- 4.7 Charging Infrastructure Growth in Germany
- 4.8 Charging Infrastructure Growth in France
- 4.9 Charging Infrastructure Growth in Italy
- 4.10 Charging Infrastructure Growth in Spain
- 4.11 Charging Infrastructure Growth in Portugal
- 4.12 Charging Infrastructure Growth in Scandinavia
- 4.13 Charging Infrastructure Growth in Switzerland
- 4.14 Technology Investment Analysis

5. Strategic Analysis of Level 1 (240V) Charging Station
- 5.1 Level 1 Charging Station Introduction
- 5.2 Power Requirements and Usage Areas
- 5.3 Technology roadmap of slow (Level 1) charging
- 5.4 Key Challenges, Market Drivers and Restraints for Slow (Level 1) Charging Infrastructure
- 5.5 Country Level Specifications of Level 1 Charging
- 5.6 Case Study of Level 1 Charging - Delphi

6. Strategic Analysis of Level 2 (240V) Charging Station
- 6.1 Level 2 Charging Station Introduction
- 6.2 Power Requirements and Usage Areas
- 6.3 Technology Roadmap of Level 2 (Fast) Charging
- 6.4 Key Challenges, Market Drivers and Restraints of Level 2 (Fast) Charging
- 6.5 Country Level Specifications of Level 2 (Fast) Charging
- 6.6 Case Study of Level 2 (Fast) Charging – POD Point

7. Strategic Analysis of Level 3 DC-DC Charging
- 7.1 DC – DC Rapid (Level 3) Charging Introduction
- 7.2 Technology Roadmap of DC - DC Rapid (Level 3) Charging
- 7.3 DC-DC Charging Growth Reasons
- 7.4 Key Challenges, Market Drivers and Restraints for DC-DC Rapid (Level 3) Charging
- 7.5 Utilities Business Model
- 7.6 Business Case for DC-DC Rapid (Level 3) Charging
- 7.7 Options for Financing DC-DC Rapid (Level 3) Charging
- 7.8 Case Study of DC-DC Rapid (Level 3) Charging – ABB and Brusa

8. Strategic Analysis of Inductive Charging
- 8.1 Inductive Charging Introduction
- 8.2 Inductive Charging Selection Parameters
- 8.3 Technology Roadmap of Induction Charging
- 8.4 Key Challenges, Market Drivers and Restraints for Inductive Charging
- 8.5 Case Study - Conductix-Wampfler’s IPT

9. Analysis of Vehicle to Grid Communication and Accessories for Charging Infrastructure
- 9.1 Charging Infrastructure Key Stakeholders Analysis
- 9.2 Expectations from Vehicle to Grid Communication
- 9.3 Future Communication Standardization
- 9.4 Connector Geometry in Europe
- 9.5 Cable and Connector Plugs Technical Requirements

10. Competitor Profiling
- 10.1 Key Industry participants
- 10.2 Companies and Partnerships in Different Regions
- 10.3 Competitors by Different Regions
  - a. UK
  - b. France
  - c. Switzerland
  - d. Spain
  - e. Austria

11. Key Conclusions and Strategic Recommendations
- 11.1 Technical Concept and Customer Requirements
- 11.2 Deployment Scenario for Charging Stations in Europe
- 11.3 Key Conclusions
- 11.4 New Business Models
- 11.5 Future Business Case Scenarios
- 11.6 Business Opportunity Forecast Benefits

12. About Frost & Sullivan

List of Figures

EV Charging Infrastructure Market: Charging Station Forecast (Europe), 2009-2017
EV Charging Infrastructure Market: Characteristics of DC-DC Rapid - Level 3 (Europe), 2010
EV Charging Infrastructure Market: Country wise Specifications by Level 1 Slow Charging (Europe), 2010
EV Charging Infrastructure Market: Country wise Specifications by Level 2 Fast Charging (Europe), 2010
EV Charging Infrastructure Market: Charging Infrastructure and Location (Europe), 2010
EV Charging Infrastructure Market : Technology Gap Analysis (Europe), 2010
EV Charging Infrastructure Market : Market Drivers and Restraints (Europe), 2011-2017
EV Charging Infrastructure Market : Charging Station Forecast (Europe), 2009-2017
EV Charging Infrastructure Market: Countries with EVs Charging Infrastructure (Europe), 2010
EV Charging Infrastructure Market: Supplier Level Positioning (Europe), 2010
EV Charging Infrastructure Market: Types of charging point infrastructure in Germany (Europe), 2010
EV Charging Infrastructure Market: Types of charging point infrastructure in France (Europe), 2010
EV Charging Infrastructure Market: Types of charging point infrastructure in Spain (Europe), 2010
EV Charging Infrastructure Market: Level 1 Charging Station Key Market Drivers and Restraints (Europe), 2011-2017
EV Charging Infrastructure Market: Country wise Specification; Level 1 Slow Charging Station (Europe), 2010
EV Charging Infrastructure Market: Level 2 Charging Station Key Market Drivers and Restraints (Europe), 2011-2017
EV Charging Infrastructure Market: Country wise Specification; Level 1 Slow Charging Station (Europe), 2010
EV Charging Infrastructure Market: Level 3 Charging Station Key Market Drivers and Restraints (Europe), 2011-2017
EV Charging Infrastructure Market: Inductive Charging Key Market Drivers and Restraints (Europe), 2011-2017
EV Charging Infrastructure Market: Key Market Participants by Charging Station Type (Europe), 2010
EV Charging Infrastructure Market: Key Market Participants of Charging Station in (European Union), 2010
EV Charging Infrastructure Market: Key Market Participants of Charging Station in (United Kingdom), 2010
EV Charging Infrastructure Market: Key Market Participants of Charging Station in (France), 2010
EV Charging Infrastructure Market: Key Market Participants of Charging Station in (Switzerland), 2010
EV Charging Infrastructure Market: Key Market Participants of Charging Station in (Spain), 2010
EV Charging Infrastructure Market: Key Market Participants of Charging Station in (Austria), 2010
Future Business Case Scenarios (Europe), 2010

List of Charts

EV Charging Infrastructure Market: Conclusions and Recommendations (Europe), 2010
EV Charging Infrastructure Market: Technology Roadmap (Europe), 2007-2017
EV Charging Infrastructure Market: Charging Station Forecast (Europe), 2009-2017
EV Charging Infrastructure Market: Charging Station Type Forecast (Europe), 2009-2017
EV Charging Infrastructure Market: Country Level Analysis of Charging Types (Europe), 2017
EV Charging Infrastructure Market: Charging Station Type Analysis (Europe), 2010 & 2017
EV Charging Infrastructure Market: Technology Investment Analysis (Europe), 2007-2025
EV Charging Infrastructure Market: Market Opportunity Map (Europe), 2010-2025
EV Charging Infrastructure Market: Lifecycle Analysis (Europe), 2010-2050
EV Charging Infrastructure Market: Charging Infrastructure (Europe), 2010
EV Charging Infrastructure Market: Charging Power and Time Roadmap (Europe), 2008-2015
EV Charging Infrastructure Market: Market Product Development Analysis (Europe), 2010
EV Charging Infrastructure Market: Charging EcoSystem (Europe), 2010
EV Charging Infrastructure Market: Technology Gap Analysis (Europe), 2010
EV Charging Infrastructure Market: Charging Station Forecast (Europe), 2009-2017
EV Charging Infrastructure Market: Charging Station Type Forecast (Europe), 2009-2017
EV Charging Infrastructure Market: Nissan Case Study (Europe), 2009-2017
EV Charging Infrastructure Market: Country Snapshot (Europe), 2010
EV Charging Infrastructure Market: Country Level Analysis of Charging Types (Europe), 2017
EV Charging Infrastructure Market: Technology Roadmap (UK), 2008-2017
EV Charging Infrastructure Market: Charging Type Analysis (UK), 2010 & 2017
EV Charging Infrastructure Market: Charging Station Forecasts (UK), 2010 & 2017
EV Charging Infrastructure Market: Technology Roadmap (Germany), 2008-2017
EV Charging Infrastructure Market: Charging Type Analysis (Germany), 2010 & 2017
EV Charging Infrastructure Market: Charging Station Forecasts (Germany), 2010 & 2017
EV Charging Infrastructure Market: Technology Roadmap (France), 2008-2017
EV Charging Infrastructure Market: Charging Type Analysis (France), 2010 & 2017
EV Charging Infrastructure Market: Charging Station Forecasts (France), 2010 & 2017
EV Charging Infrastructure Market: Technology Roadmap (Italy), 2008-2017
EV Charging Infrastructure Market: Charging Type Analysis (Italy), 2010 & 2017
EV Charging Infrastructure Market: Charging Station Forecasts (Italy), 2010 & 2017
EV Charging Infrastructure Market: Technology Roadmap (Spain), 2008-2017
EV Charging Infrastructure Market: Charging Type Analysis (Spain), 2010 & 2017
EV Charging Infrastructure Market: Charging Station Forecasts (Spain), 2010 & 2017
EV Charging Infrastructure Market: Technology Roadmap (Portugal), 2008-2017
EV Charging Infrastructure Market: Charging Type Analysis (Portugal), 2010 & 2017
EV Charging Infrastructure Market: Charging Station Forecasts (Portugal), 2010 & 2017
EV Charging Infrastructure Market: Technology Roadmap (Scandinavia), 2008-2017
EV Charging Infrastructure Market: Charging Type Analysis (Scandinavia), 2010 & 2017
EV Charging Infrastructure Market: Charging Station Forecasts (Scandinavia), 2010 & 2017
EV Charging Infrastructure Market: Technology Roadmap (Switzerland), 2008-2017
EV Charging Infrastructure Market: Charging Type Analysis (Switzerland), 2010 & 2017
EV Charging Infrastructure Market: Charging Station Forecasts (Switzerland), 2010 & 2017
EV Charging Infrastructure Market: Technology Investment Analysis (Europe), 2007-2025
EV Charging Infrastructure Market: Level 1 Charging Station Forecasts (Europe), 2010-2017
EV Charging Infrastructure Market: Level 1 Charging Roadmap (Europe), 2008-2017
EV Charging Infrastructure Market: Level 2 Charging Station Forecasts (Europe), 2010-2017
EV Charging Infrastructure Market: Level 2 Charging Roadmap (Europe), 2008-2017
EV Charging Infrastructure Market: Level 3 DC-DC Rapid Charging Station Forecasts (Europe), 2010-2017
EV Charging Infrastructure Market: Level 3 DC-DC Rapid Charging Roadmap (Europe), 2008-2017
EV Charging Infrastructure Market: Utilities ROI Potential (Europe), 2009-2017
EV Charging Infrastructure Market: Basic Working of Induction Charging (Europe), 2010
EV Charging Infrastructure Market: Induction Charging Roadmap (Europe), 2008-2017
EV Charging Infrastructure Market: Conductix-Wampfler Solution (Europe), 2010
EV Charging Infrastructure Market: EV Charging Infrastructure Market: Key Conclusions (Europe), 2010
EV Charging Infrastructure Market: Future Business Case Scenarios (Europe), 2010
EV Charging Infrastructure Market: Charging Infrastructure Key Stakeholders (Europe), 2010

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