FIER SUSTAINABLE MOBILITY

Measures to Support the Uptake of Electric Vehicles for Low Income Households

Quick scan of measures in a selected number of European countries and some international cases outside Europe

Report for the Dutch Ministry of Infrastructure and Water Management



September 2026

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Methodology and scope of the quick scan

Desk research	Direct sources	Relevance-based programme selection	Selected European + international cases
Review of government websites, programme documentation, legislation, implementation reports and other relevant public sources.	Supplemented, where available, by information obtained directly from programme stakeholders through e-mail exchanges and telephone interviews.	Identification of the most relevant electric-mobility incentives aimed at lower- and lower-middle-income households, including purchase grants, social leasing, favourable finance, used-EV support and shared-mobility measures.	The scan covers a selection of European countries, complemented by several specific cases outside Europe where particularly relevant approaches to lower-income EV affordability were identified.

Descriptive, not evaluative

The Quick scan describes programme design, eligibility, support levels and available implementation evidence. It is not intended as an exhaustive international inventory or an assessment of which measures are most effective.

Benchmark EV affordability programmes in selected countries

A Strongest direct income-targeted benchmarks

France: operational social leasing, low-income + car-dependence
Germany: operational income/child-graduated grant at scale
Italy: income + scrappage + price ceiling
Scotland (UK): 0% used-EV loan
Sweden: income + location targeting, used EVs included

B Social Climate Fund programmes

Latvia, Lithuania, Greece, Luxembourg: approved/forthcoming designs with limited outcome evidence so far

C Broader affordability & additionality comparators

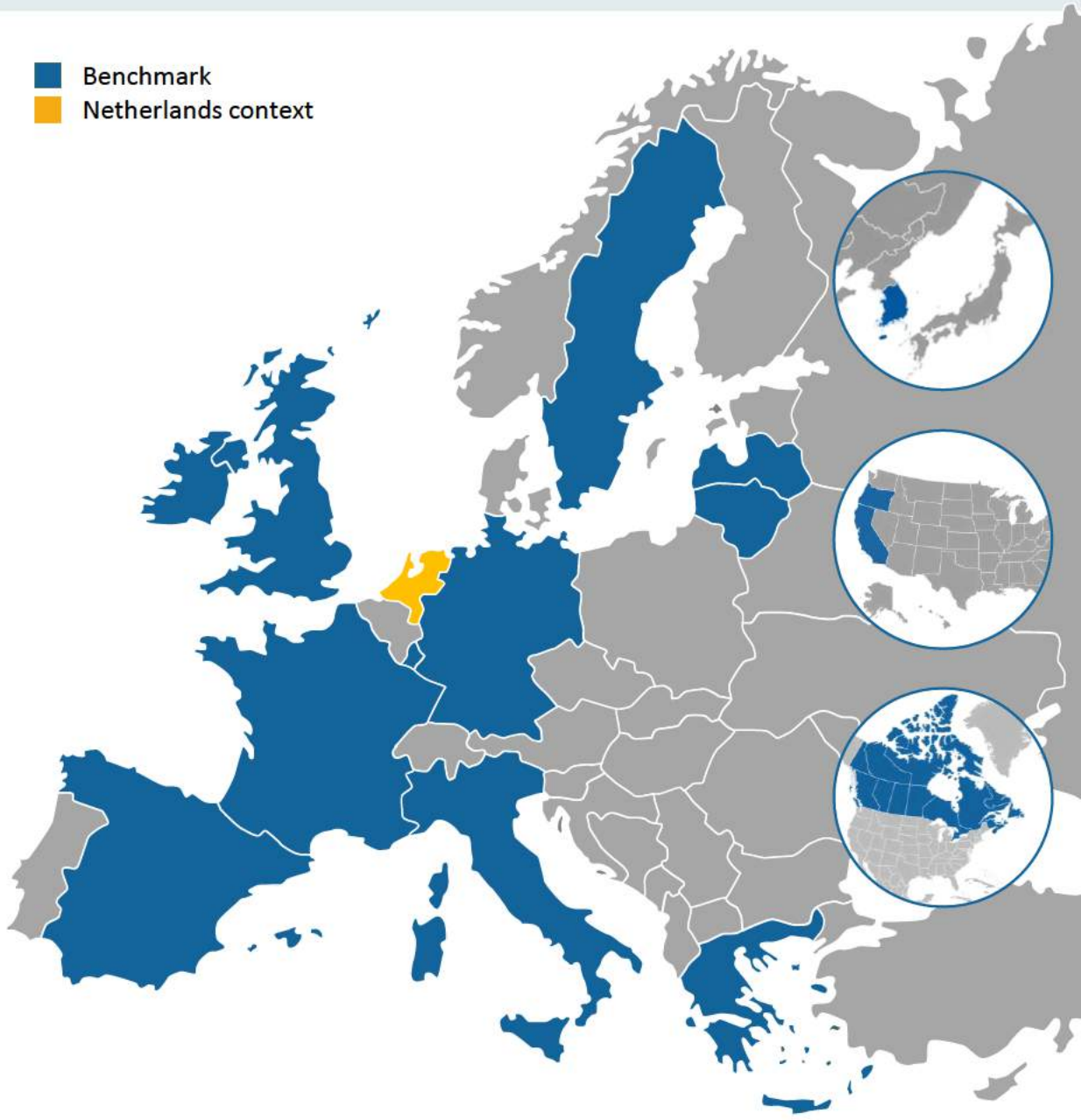
Spain Auto+, **UK** Electric Car Grant and **Ireland** ICE2EV: not income-tested, but useful references for vehicle-price targeting, point-of-sale support and scrappage/replacement conditions

D Income-targeted policies outside Europe

South Korea: EV Purchase Subsidy with Social Top-ups
California (US): Clean Cars 4 All + Driving Clean Assistance Program
Oregon (US): Charge Ahead Rebate

E Shared-car incentives

Belgium Bruxell'Air and **California** Clean Mobility Options: direct lower-income shared-car targeting
Belgium federal Mobility Budget, **France** Forfait mobilités durables and **Canada** EV support for carsharing operators: general shared-car incentives



1 Private-car programmes targeting lower-income households in selected European countries

Overview of selected EV affordability programmes in Europe

Scotland (UK)
- **Used Electric Vehicle Loan**
- 0% finance for used EVs, targeted by income or rural location, with public capital recycled through repayments.

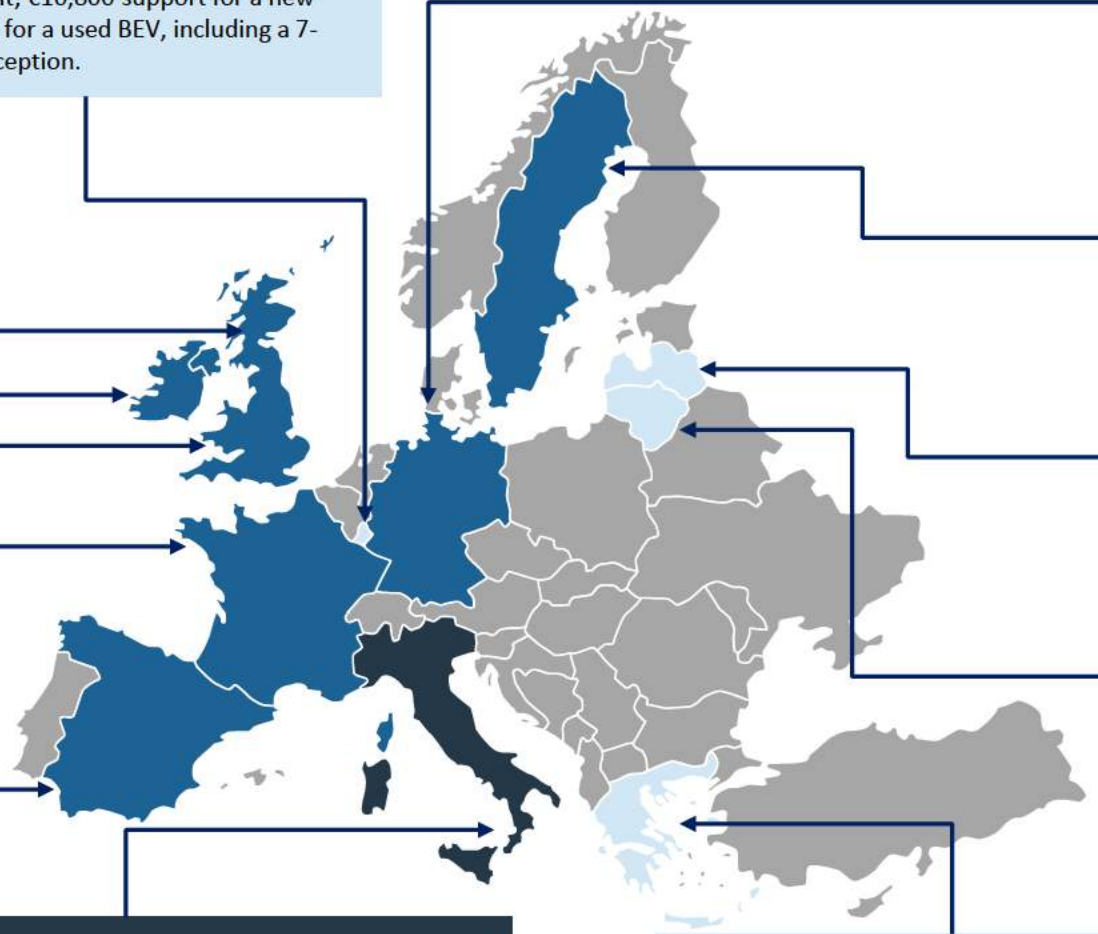
Ireland
- **Scrappage Pilot + EV Purchase Grant**
- €5,000 scrappage top-up on the €3,500 general BEV grant - €8,500 point-of-sale support for replacing a 2013-or-older car.

United Kingdom
- **Electric Car Grant**
- £1,500–£3,750 (~€1,745- €4,363) automatic discount for new EVs around or below £37k (~€43,047); ~£2bn (~€2.3bn) programme and >160,000 drivers already supported.

France
- **Social Leasing Scheme for Low-Income Households**
- New EVs for <€200/month with no deposit - social leasing targeted to low-income, car-dependent households; 50,000+ households; up to €9,500 support.

Spain
- **Programa Auto+**
- Up to €4,500 for private buyers, with higher support for EVs ≤€35k and European production; €350m household budget in 2026.

Luxembourg
- **Social Leasing for Vulnerable Households**
- From 2027: 36-month full-service social lease with no deposit; €10,800 support for a new BEV or €4,500 for a used BEV, including a 7-seat family exception.



Italy
- **Electric Vehicle Bonus**
- €11,000 for ISEE ≤€30k / €9,000 for ISEE ≤€40k, conditional on scrapping a Euro 5-or-older car and buying a new BEV ≤€35k excl. VAT.
- ISEE = Indicatore della Situazione Economica Equivalente (specific poverty indicator)

Germany
- **Socially Graduated EV Purchase & Leasing Grant**
- €3,000-€6,000 BEV grant, socially graduated by income and children; 71% of beneficiaries have taxable household income ≤€60,000; new cars only, no price ceiling and no transport-dependence test.

Sweden
- **Targeted EV Premium (Elbilspremien)**
- Income + location targeting, with used EVs included and up to SEK 64,800 (~€5,823) for the lowest-income households.

Latvia
- **Social Climate Fund EV Support for Vulnerable Transport Users**
- Up to 90% support: €15k new / €13k used BEV + €2k home wallbox + 1 set tyres, targeted by income, geography and existing car dependence.

Lithuania
- **Social Climate Fund Support for BEVs**
- Up to 90% of the BEV price: €20k new / €12k used, with purchase or leasing support for vulnerable, car-dependent households.

Greece
- **Social Leasing for Electric Vehicles**
- Approved Social Leasing: 15,000 transport-vulnerable households, 4-year EV lease at ≤€150/month; €165.3m final public envelope.

Historical / Closed

Operational / Currently Implemented

Planned / Announced

France | Social Leasing Scheme



Status

Operational, 3rd edition. Reservations for the 2026 round opened on 16 July 2026.

Target group & mechanism

- Adults domiciled in France with reference tax income ≤ €16,880 per tax unit.
- Must be dependent on a private car for work:
  - home-to-work distance >10 km, using the personal vehicle; or
  - >8,000 km/year driven with the personal car for professional activity.
- Persons who already benefited from social leasing in 2024 or 2025 are excluded from the 2026 round.
- Long-term financial lease of at least 3 years, with or without purchase option.
- Contract must include at least 15,000 km/year without additional mileage charges.
- Basic monthly lease payment must be <€200/month; each participating lessor must initially offer at least 25% of its vehicles below €140/month.
- No initial contribution/deposit is required and the lessor cannot charge an administration fee for advancing the subsidy. Mandatory insurance and optional maintenance/services are not included in the €200 ceiling.

Vehicle scope

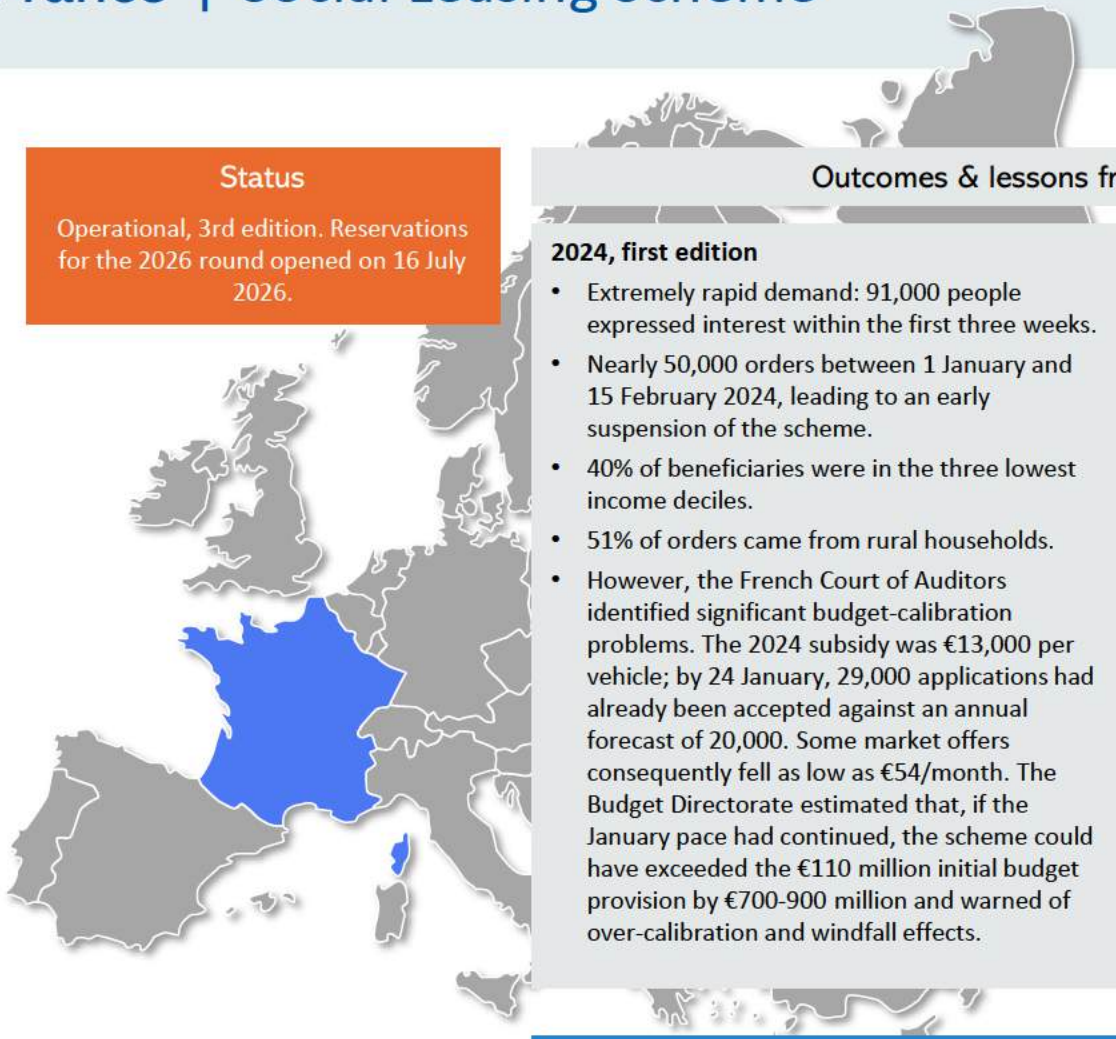
- **New battery-electric passenger cars only**. Used EVs are **not eligible**.
- Vehicles must come from the official programme eligibility list.
- The official list dated 8 July 2026 contains 20 model lines, including for example:
  - Citroën ë-C3 / ë-C3 Aircross
  - Hyundai Inster / Kona
  - Fiat Grande Panda
  - Renault R4, R5, Mégane and Twingo E-Tech
  - Peugeot e-208, e-2008 and e-308
  - Nissan Micra
  - Opel Corsa, Frontera and Mokka
- Aid is deliberately differentiated according to **European production of the vehicle, battery and motor**, combining the social objective with an industrial-policy objective.

- Objective: **at least 50,000 new BEVs** leased to lower-income households in 2026.
- Implemented through **PRO-INNO-86**, managed by **ADEME and ASP** and financed through France's **Energy Savings Certificates (CEE)** system.
- Maximum programme financing: **€401 million**.

Financial support / public cost

- Standard maximum aid: €6,500 per vehicle.
- Maximum increases to €9,000 where both the vehicle assembly site and battery-production site are in the European Economic Area (EEA).
- Additional €500 if the motor is also manufactured in the EEA.
- Therefore, maximum aid ranges up to €9,500 per vehicle.
- In all cases, aid is capped at 29% of the vehicle acquisition cost.
- Total 2026 programme envelope: €401 million for at least 50,000 households, equivalent to an indicative €8,020 programme envelope per targeted household if exactly 50,000 vehicles are supported. This is not the individual subsidy rate, which depends on the vehicle.
- Funding comes from the CEE mechanism, rather than a conventional direct state-budget appropriation.

France | Social Leasing Scheme



Status

Operational, 3rd edition. Reservations for the 2026 round opened on 16 July 2026.

Outcomes & lessons from previous cycles

2024, first edition

- Extremely rapid demand: 91,000 people expressed interest within the first three weeks.
- Nearly 50,000 orders between 1 January and 15 February 2024, leading to an early suspension of the scheme.
- 40% of beneficiaries were in the three lowest income deciles.
- 51% of orders came from rural households.
- However, the French Court of Auditors identified significant budget-calibration problems. The 2024 subsidy was €13,000 per vehicle; by 24 January, 29,000 applications had already been accepted against an annual forecast of 20,000. Some market offers consequently fell as low as €54/month. The Budget Directorate estimated that, if the January pace had continued, the scheme could have exceeded the €110 million initial budget provision by €700-900 million and warned of over-calibration and windfall effects.

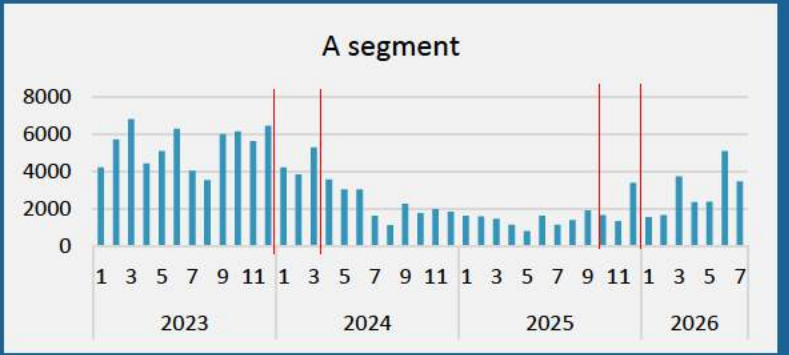
2025, second edition

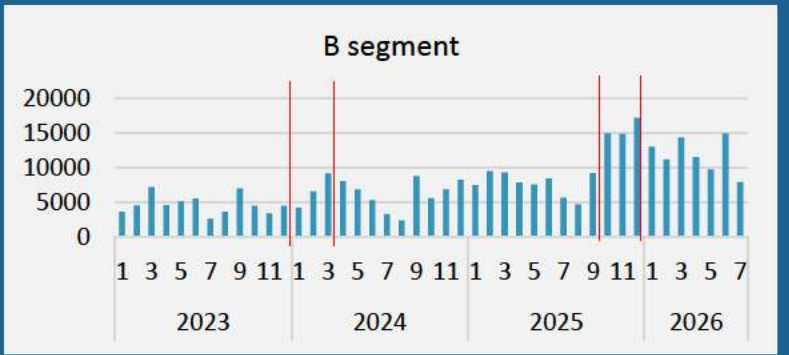
- Again, very high demand: >35,000 vehicles ordered in the first week after opening on 30 September.
- 41,500 vehicles allocated by 29 October; the full 50,000-vehicle target was subsequently reached.
- 45% of beneficiaries were in the three lowest income deciles, up from 40% in 2024.
- 55% of orders went to rural households, up from 51% in 2024.
- Nearly 30% of vehicles were used in areas with particular air-quality challenges.
- 34% of vehicles ordered were manufactured in France.
- Across the first two editions, the programme enabled more than 100,000 lower-income users to access a new EV.

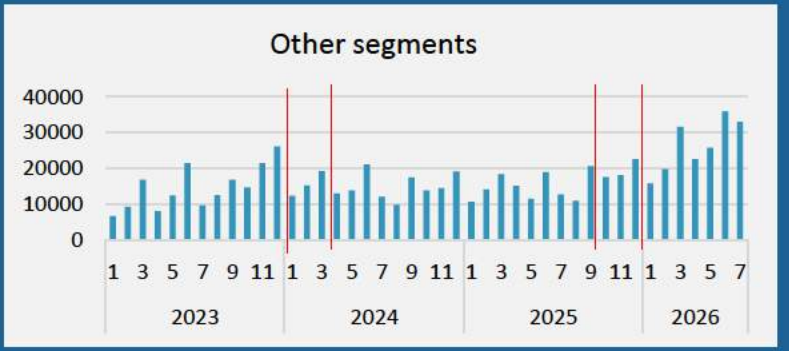
Relevant observations

France demonstrates that social leasing can **remove the upfront acquisition barrier and generate very strong uptake among lower-income and car-dependent households**, including rural households. At the same time, the 2024 experience shows that **subsidy levels, quotas and budget exposure need careful process finding the sweet spot** to avoid over-subsidisation and very rapid budget exhaustion. The subsequent editions use lower/more differentiated vehicle support and fixed programme volumes.

Total number of EV registrations in France per segment







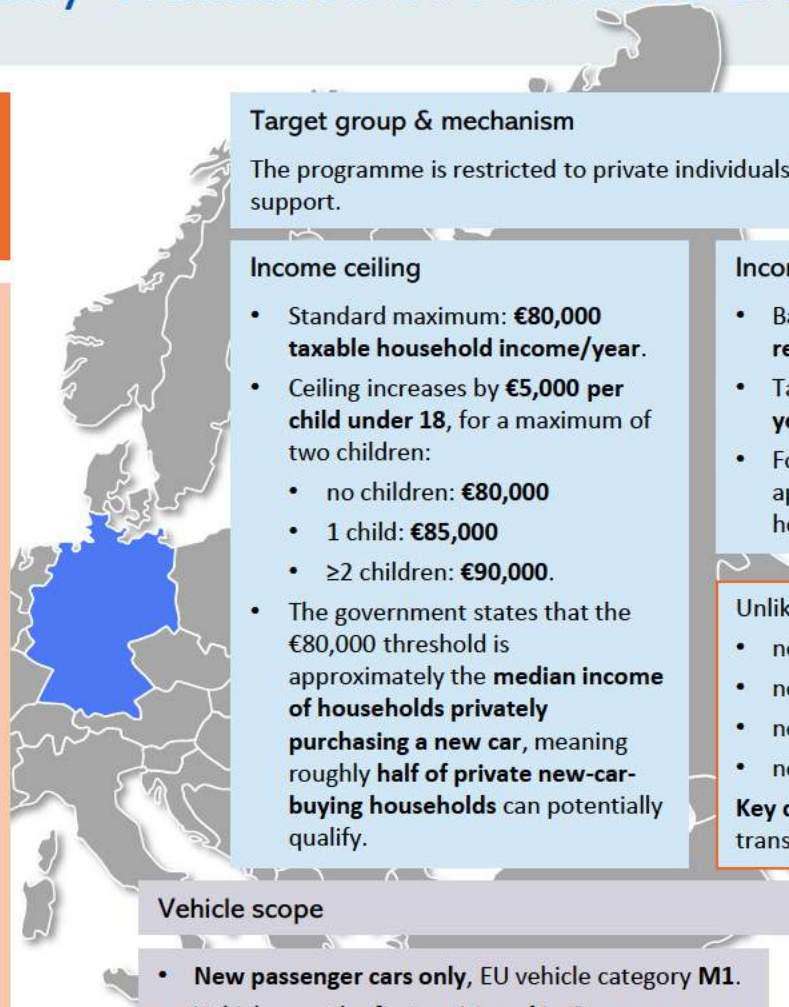
Source: EAFO

Germany | Socially Graduated EV Purchase & Leasing Grant

Status

Operational. The new federal E-Auto-Förderung entered into force on 19 May 2026.

- Applications have been possible since 19 May 2026, but support applies retroactively to eligible vehicles first registered from 1 January 2026.
- The programme is administered by BAFA, the Federal Office for Economic Affairs and Export Control.
- The funding guideline runs until 31 December 2029, although applications can be stopped earlier if the available budget is exhausted.
- Total programme budget: €3 billion for 2026-2029.
- Government estimates this is sufficient for approximately 800,000 vehicles.
- Financing comes from Germany's Climate and Transformation Fund (KTF), including revenues from carbon pricing. It is not an EU Social Climate Fund programme.



Target group & mechanism

The programme is restricted to private individuals and uses household taxable income and number of children to determine both eligibility and the amount of support.

Income ceiling

- Standard maximum: **€80,000 taxable household income/year**.
- Ceiling increases by **€5,000 per child under 18**, for a maximum of two children:
  - no children: **€80,000**
  - 1 child: **€85,000**
  - ≥2 children: **€90,000**.
- The government states that the €80,000 threshold is approximately the **median income of households privately purchasing a new car**, meaning roughly **half of private new-car-buying households** can potentially qualify.

Income calculation

- Based on the **average taxable income in the two most recent available income-tax assessments**.
- Tax assessments may be no more than **three calendar years old**.
- For married, registered-partnership or cohabiting applicants, the partner's taxable income is included in household income.

Social graduation

- Household income **€60,001-€80,000**: base subsidy.
- Household income **€45,001-€60,000**: **+€1,000**.
- Household income **≤€45,000**: **+€2,000** compared with the base subsidy.
- Additional **€500 per child**, maximum **€1,000 for two or more children**.

Unlike France and Sweden, there is:

- no commuting-distance requirement;
- no rural/public-transport accessibility test;
- no scrappage requirement;
- no requirement that the household has not previously owned an EV.

Key distinction: Germany targets primarily through **income graduation**, rather than combining income with actual transport dependence.

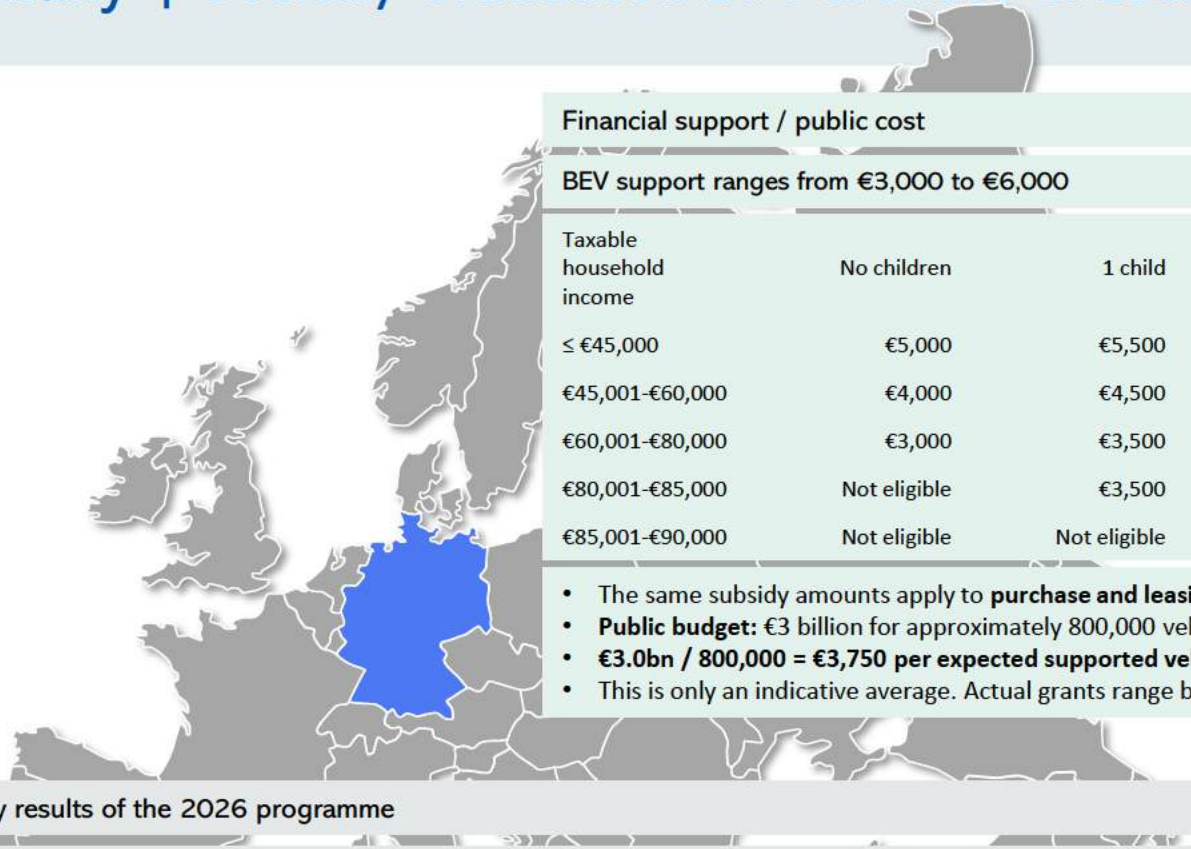
Vehicle scope

- **New passenger cars only**, EU vehicle category **M1**.
- Vehicle must be **first registered in Germany**.
- Both **purchase and leasing** qualify.
- **Used EVs are not eligible.**
- Eligible technologies:
  - **BEV**
  - **FCEV**, receiving the same rate as a BEV
  - **PHEV**
  - **Range-extended EV (REEV)**.

- For PHEVs and REEVs registered between **1 January 2026 and 30 June 2027**, the vehicle must meet at least one of the following:
  - type-approval emissions **≤60 g CO_2/km, or**
  - electric range **≥80 km**.
- The government intends to review the PHEV/REEV criteria for vehicles registered from **1 July 2027**, potentially using real-world CO_2 emissions.

- **Minimum holding period: 36 months** for both purchase and leasing. Failure to comply can lead to partial or full recovery of the subsidy.
- **Importantly, there is NO vehicle-price ceiling.** The subsidy applies independently of list price. The government explicitly states that this is a deliberate design choice intended to simplify administration and allow households more freedom of vehicle choice.

Germany | Socially Graduated EV Purchase & Leasing Grant



Financial support / public cost

BEV support ranges from €3,000 to €6,000

Taxable household income	No children	1 child	≥2 children
≤ €45,000	€5,000	€5,500	€6,000
€45,001-€60,000	€4,000	€4,500	€5,000
€60,001-€80,000	€3,000	€3,500	€4,000
€80,001-€85,000	Not eligible	€3,500	€4,000
€85,001-€90,000	Not eligible	Not eligible	€4,000

PHEV/REEV support ranges from €1,500 to €4,500

Taxable household income	No children	1 child	≥2 children
≤ €45,000	€3,500	€4,000	€4,500
€45,001-€60,000	€2,500	€3,000	€3,500
€60,001-€80,000	€1,500	€2,000	€2,500
€80,001-€85,000	Not eligible	€2,000	€2,500
€85,001-€90,000	Not eligible	Not eligible	€2,500

- The same subsidy amounts apply to **purchase and leasing**.
- **Public budget:** €3 billion for approximately 800,000 vehicles gives an indicative programme envelope of about:
- **€3.0bn / 800,000 = €3,750 per expected supported vehicle.**
- This is only an indicative average. Actual grants range between €1,500 and €6,000 depending on propulsion type, income and family composition.

Early results of the 2026 programme

The first official statistics already suggest strong demand and that the income graduation is materially affecting who receives support. By early August 2026:

- **>100,000 applications** had already been submitted.
- **26,875 applications had been approved by 1 August 2026**.
- **€117 million** had been paid out.
- **92% of approved vehicles were BEVs** and only **8% PHEV/REEV**.
- **71% of supported households had taxable income ≤€60,000**.
- Approximately **half of approvals were in the lowest income category, ≤€45,000**.
- Purchase and leasing were approximately **evenly split** among approved applications.

The €117 million across 26,875 approvals implies an actual average subsidy of approximately: **€117m / 26,875 ≈ €4,353 per approved vehicle.** This is above the programme-wide planning assumption of approximately €3,750 per vehicle, consistent with the high initial share of lower-income applicants receiving the additional social supplements.

No price ceiling: early evidence

Despite having no maximum vehicle price:

- **well over 80% of approvals** could be associated with vehicles having a reference/list price **below €50,000**;
- vehicles with a **six-figure base price represented only a fraction of one percent** of approvals.

The government therefore concluded in August 2026 that there was, at that stage, insufficient evidence to justify introducing a vehicle-price ceiling.

Germany | Socially Graduated EV Purchase & Leasing Grant

Lessons from Germany's previous *Umweltbonus* programme, 2016-2023

Germany has particularly valuable ex-post evidence because the previous *Umweltbonus* was independently evaluated after it ended.

Scale

From **2016 to December 2023**:

- approximately **2.1 million electric vehicles** received support;
- approximately **€10 billion** was paid by the federal government;
- the programme covered both households and companies and, at different stages, BEVs, PHEVs and FCEVs.

The programme ended abruptly on **17 December 2023** following constraints on the Climate and Transformation Fund after the Federal Constitutional Court judgment. This illustrates the importance of **predictable funding and phase-out rules** for both consumers and the automotive market.

Distributional weakness of the previous programme

The previous *Umweltbonus* did **not use household income to determine eligibility or subsidy level**. Evaluation evidence found that the distribution of support was socially unequal, with **above-average-income households benefiting disproportionately**, while economically stronger western German regions received relatively more support than weaker eastern regions. The evaluation therefore identified explicit income targeting as a potential improvement for future programmes.

This is a major reason why the **2026 scheme is materially different from its predecessor**.

Significant additionality, but substantial windfall effects

The official 2024 programme evaluation estimated **free-rider / anticipation effects among private beneficiaries** of:

- **51.5%** in the first funding period;
- **33.8%** in the second;
- **36.6%** in the third.

In other words, a substantial proportion of subsidised purchases would either have occurred anyway or were brought forward in response to the programme.

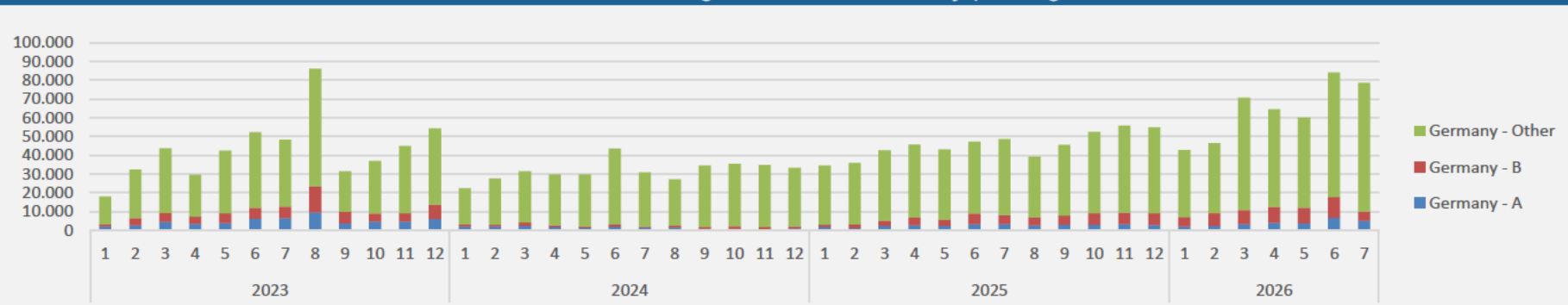
Climate outcome

The official evaluation estimated that by 2023 vehicles supported under the *Umweltbonus* generated approximately:

- **2.9 Mt CO_2-eq gross annualised GHG savings**, and
- approximately **1.8 Mt CO_2-eq net savings** after accounting for free-rider, anticipation and rebound effects.

BEVs accounted for most of the reduction, while PHEVs contributed disproportionately less.

Total number of EV registrations in Germany per segment



Source: EAFO

Key lessons

1. **Income graduation can redirect a broad purchase subsidy towards lower-income households.**
   The contrast with the old *Umweltbonus* is particularly important: the former non-income-tested programme disproportionately benefited higher-income households, whereas **71% of current beneficiaries are already at ≤€60,000 taxable household income**.
2. **Germany provides a simple model for family differentiation.**
   An income ceiling that rises by **€5,000 per child** combined with **€500 additional subsidy per child** avoids forcing larger households into the same eligibility framework as single-person households.
3. **The scheme is socially graduated, but not narrowly targeted at low incomes.**
   The government explicitly selected the €80,000 threshold because it corresponds approximately to the median income of **private new-car buyers**, not because €80,000 represents a low-income household. It is therefore broader than the Swedish or French approach.
4. **Used EVs not included in the scheme**
   Only newly registered new vehicles qualify. For a policy primarily concerned with affordability for lower-income groups, Sweden's inclusion of used EVs remains more directly transferable.
5. **A vehicle-price ceiling may not be indispensable when income targeting is effective.**
   Germany consciously omitted one, yet >80% of early approvals concern vehicles below €50,000. This provides an interesting counterpoint to Sweden's explicit SEK 450,000 ceiling.
6. **Previous-programme evidence shows why additionality matters.**
   Private-household free-rider/anticipation effects of roughly **34-52%** in the former programme demonstrate that high EV uptake alone is not sufficient evidence of efficient public spending.

Italy | PNRR Electric Vehicle Bonus

Status

Closed/completed.
Applications opened 22 Oct 2025; funds fully reserved within ~24 hours.

The scheme opened to individuals and micro-enterprises on **22 October 2025**.

It was established under Italy's **National Recovery and Resilience Plan (PNRR), Mission 2, Component 2, Investment 4.5**, following the 2025 revision of the PNRR.

The scheme was legally available until **30 June 2026**, unless funds were exhausted earlier.

In practice, demand was extraordinary: the available funding was fully reserved **a little over 24 hours after opening**.

The programme was administered by the **Ministry of Environment and Energy Security (MASE)**, with the digital platform developed/managed with **Sogei**.

Original public envelope under Ministerial Decree No. 236/2025: **€597.32 million**.

At programme launch, the associated PNRR target was at least **39,000 zero-emission vehicles**. Following the November 2025 technical revision of the PNRR, the accounting of the investment was subsequently restructured between M2C2-I4.5 and a reinforced REPowerEU measure, M7-I18. This did **not change the household grant amounts or eligibility rules**.

Target group & mechanism

Italy combines **three targeting mechanisms simultaneously**: **income + geography + replacement of an existing polluting vehicle.**

Income criterion

For individuals:

Household ISEE	Grant
≤ €30,000	**€11,000**
>€30,000 to ≤€40,000	**€9,000**
>€40,000	**Not eligible**

The Italian **ISEE, Indicatore della Situazione Economica Equivalente**, is a means-tested indicator reflecting household income, assets and household composition rather than simple gross annual income.

Only **one person per household** can receive the private-car incentive.

Geographic criterion

The individual must reside in a designated **Functional Urban Area, FUA / Area Urbana Funzionale**.

An FUA comprises:

- an urban centre/city; and
- its surrounding commuting zone characterised by significant daily travel flows.

The geographic criterion was deliberately introduced to concentrate the measure where replacement of polluting cars was expected to generate stronger **environmental and social benefits**.

This makes Italy unusual. Unlike Sweden, which uses rural/poor-public-transport geography, Italy targets **functional urban areas**.

Mandatory vehicle replacement

The subsidy requires **scrapping an existing combustion vehicle**:

- same vehicle category, M1;
- emissions class **Euro 5 or older**;
- vehicle to be scrapped must have been registered to the applicant for at least **6 months**;
- alternatively, it can belong to another adult member of the same ISEE household under the conditions specified in the decree.
- The scrapped vehicle **cannot return to circulation**.

This creates a strong additionality condition. A household cannot receive the grant merely to add an EV as a second or third household car while keeping the polluting vehicle.

Transaction mechanism

- Applicant generates a **digital voucher**.
- Voucher must be validated at an authorised dealer within **30 days**.
- Subsidy is applied **directly as a reduction in the purchase price**.
- Purchased vehicle must remain owned by the beneficiary for at least **24 months**.

This is highly relevant for lower-income households because they do **not have to advance €9,000-€11,000 and wait for reimbursement**.

Vehicle scope

The household scheme is very narrowly defined.

Eligible:

- **new M1 passenger car**
- **BEV only**
- never previously registered, either in Italy or another country
- **purchase in ownership only**.

Not eligible:
used EVs;
PHEVs;
conventional hybrids;
FCEVs under the private M1 provision;
financial leasing;
long-term rental/social leasing.

MASE's FAQ explicitly states that the PNRR contribution applies **only to acquisition in ownership**, not alternative acquisition forms.

Vehicle-price ceiling

The manufacturer's official list price must be:
≤ €35,000 excluding VAT and optional equipment.

With Italy's 22% VAT, €35,000 excluding VAT corresponds to approximately: **€42,700 including VAT**, before optional equipment and registration-related charges.

The legal €35,000 test excludes:

- VAT;
- optional equipment;
- provincial registration tax;
- registration/administrative charges;
- PRA fees;
- stamp duty;
- licence plates.

This is a particularly strong **anti-windfall / affordable-vehicle rule**. Unlike Germany's current scheme, premium EVs simply cannot qualify.

Large families

The scheme contains **no higher vehicle-price ceiling for larger families and no dedicated six-/seven-seat adjustment**.

This is potentially a weakness for the application because larger BEVs with six or seven seats are substantially less likely to fit within the Italian €35,000 excluding-VAT ceiling.

Italy | PNRR Electric Vehicle Bonus

Financial support / public cost

The private-household structure is exceptionally simple:

Eligibility	Public grant
ISEE **≤€30,000**	**€11,000**
ISEE **€30,001-€40,000**	**€9,000**

Because the vehicle's pre-VAT list price is capped at €35,000, the subsidy can represent a substantial proportion of vehicle value.

For example:

€25,000 EV + €11,000 grant → household pays €14,000 before other costs

The public grant would cover:

44% of the €25,000 vehicle price.

At the maximum €35,000 pre-VAT price:

- €11,000 equals **31.4%**
- €9,000 equals **25.7%**

of the pre-VAT vehicle list price.

These ratios illustrate how aggressive the Italian support is compared with most European programmes.

Public budget

The implementing decree made **€597.32 million** available for the overall programme covering:

- private M1 cars; and
- N1/N2 electric commercial vehicles for micro-enterprises.

For micro-enterprises, which are secondary to the present analysis:

- up to **30% of purchase price**
- maximum **€20,000 per vehicle**
- maximum **2 vehicles per micro-enterprise**.

The initial PNRR objective was at least **39,000 zero-emission vehicles**.

Programme outcomes & lessons

Extraordinary demand

The application platform opened on **22 October 2025 at 12:00**. By **23 October**, a little over 24 hours later:

- approximately **€595-597 million** had been fully reserved;
- **55,680 vouchers** had been generated by private applicants and micro-enterprises;
- MASE stated that the programme's original PNRR vehicle target had already been **fully exceeded at voucher-request stage**.

Later Sogei reporting refers to **55,765 generated vouchers** and a **99.3% validation rate among registered dealers/operators**, reflecting subsequent platform processing. The difference from the 55,680 figure is explained by the later reporting cut-off.

This means demand was roughly: **55,680 vouchers / 39,000 original target ≈ 143% of the original vehicle target** within around one day.

That is among the strongest demand responses identified in the international comparison.

Important caveat: voucher ≠ completed vehicle

Applicants initially had **30 days to validate the voucher through an authorised seller**. Unused or expired vouchers returned funding to the available pool.

Therefore, the initial 55,680 figure should be described as **vouchers generated**, not completed subsidised purchases.

The programme's contract and scrappage documentation ultimately had to be completed by **30 June 2026**.

Lessons from earlier 2024 Ecobonus

In 2024, Italy operated a broader Ecobonus covering different powertrains. For BEVs:

- basic grant without scrappage: **€6,000**
- with scrappage:
  - Euro 0-2: **€11,000**
  - Euro 3: **€10,000**
  - Euro 4: **€9,000**
- households with **ISEE <€30,000 received 25% higher support**, taking the maximum BEV subsidy to **€13,750**.

Demand was again extremely rapid

When the 2024 programme opened on **3 June 2024**:

- more than **€200 million** of BEV funding was exhausted in **less than 9 hours**;
- **25,273 BEV reservations** were registered.

Among BEV reservations:

- **61.7%** were made by private individuals;
- among these private applicants, **25.9% were low-ISEE beneficiaries**;
- these low-ISEE beneficiaries accounted for **35.6% of the value of BEV subsidies reserved**;
- **39%** of BEV reservations involved scrappage;
- around half of the scrapped vehicles were **Euro 0-3**.

Across the whole 2024 Ecobonus after one month:

- **118,015 reservations**
- nearly **€421 million** committed
- **61%** of available resources used
- **84%** of applicants were individuals
- **79%** of reservations involved scrappage
- **26.7% of all programme resources** were requested by households with ISEE below €30,000.

These results are highly relevant because they show that **adding a larger subsidy for low-income households materially increased their share of public expenditure**, but did not make them the majority of BEV recipients.

Key lessons

1. **Italy provides one of Europe's cleanest examples of combining income, vehicle affordability and scrappage.**
   Eligibility simultaneously requires **ISEE ≤€40,000 + affordable BEV + existing old ICE vehicle + eligible geography**.
2. **The €9,000-€11,000 subsidy is large enough to materially alter affordability.**
   For a €25,000 BEV, the €11,000 contribution removes **44% of the pre-VAT vehicle price**.
3. **Mandatory scrappage improves additionality.**
   The subsidy does not merely reward someone who was already going to add a new EV. A Euro 5 or older combustion car must leave the fleet.
4. **Point-of-sale payment is particularly important for the target group.**
   The household receives the subsidy as an immediate discount rather than financing the entire purchase and claiming reimbursement later.
5. **The €35,000 pre-VAT price ceiling effectively excludes premium cars.**
   This is stronger than Germany's approach and could be readily transferred to a used-BEV scheme as a maximum transaction-price rule.
6. **New-only eligibility remains a major weakness.**
   For the lower-income target group, Italy's €9,000-€11,000 grant may be less budget-efficient than providing a smaller grant towards a **€15,000-€20,000 used BEV**.
7. **Italy demonstrates the risk of click-day programme design.**
   Both:
   - the 2024 BEV budget was exhausted in **<9 hours**, and
   - the 2025 PNRR programme was fully reserved in roughly **24 hours**.

   Rapid exhaustion proves strong demand, but it can also favour applicants who:
   - know about the scheme early;
   - have digital skills;
   - can make an immediate vehicle decision;
   - already have access to a dealer.
   - This can conflict with the objective of reaching the most vulnerable households.
8. **8. Income graduation alone does not guarantee that most beneficiaries are low income.**
   Under the 2024 scheme, only **25.9% of private BEV reservations** were from low-ISEE households, despite the substantially higher subsidy.
9. **9. Italy's geographic targeting is almost the reverse of Sweden's.**
   Sweden prioritises rural and public-transport-poor areas. Italy restricted eligibility to **Functional Urban Areas**. A transport-poverty measure would probably use **actual transport dependence/public-transport accessibility** rather than copying either geographic rule directly.

Scotland (UK) | Used Electric Vehicle Loan

Status

Historical. Closed in 2026 and will not reopen for new applications.



- The Used Electric Vehicle Loan formed part of Scotland's wider **Low Carbon Transport Loan (LCTL)** programme.
- Funded by the **Scottish Government / Transport Scotland** and administered by the **Energy Saving Trust**.
- The final consumer scheme was active during **2025/26**.

The 2026/27 policy direction has changed:

- the previous interest-free vehicle loan **will not be reinstated**;
- instead, Scotland has allocated **£17.8 million (~€20.7 million) in 2026/27** to a package focused predominantly on EV charging access;
- priority groups include **lower-income households, rural and island communities and households without off-street parking**.

Target group & mechanism

The final scheme is one of the clearest European examples of combining **income targeting with rural transport vulnerability**.

Applicants could qualify through one of two main routes:

- household gross income **≤£50,000 (~€58,197) per year**; or
- residence in an eligible **rural, remote or island location**.

The Scottish Government's 2026 FOI response confirms that:

- **£50,000 household income** was deliberately selected as the mechanism for directing support towards lower-income households;
- geographical eligibility corresponded broadly to **Groups 5-8 of Scotland's eight-fold Urban Rural Classification**, including accessible rural, remote rural and very remote rural areas.

The support mechanism was not a subsidy. It was a **0% interest loan covering all or part of an eligible used EV purchase price.**

This is a major distinction from France, Sweden, Germany and the UK ECG. The capital was intended to be **repaid and recycled** into subsequent loans.

Vehicle scope

In the **final 2025/26 consumer scheme**:

- **used pure-electric vehicles only**;
- used electric cars: maximum cost / loan **£23,000 (~€26,771)**;
- used electric vans: maximum cost / loan **£23,000**;
- electric motorcycles: maximum **£5,000 (~€5,820)**;
- electric mopeds: maximum **£5,000**;
- **PHEVs were not eligible**;
- qualifying ex-demonstrator vehicles had to be **more than six months old and have travelled more than 1,000 miles**;
- vehicle had to be bought through an acceptable dealership rather than a private seller;
- repayment period could extend for **up to six years**, depending on the vehicle/loan conditions.

This design is strongly focused on the **second-hand market**, unlike France, Germany and the UK national grant.

The maximum eligible car value also tightened over time:

- historically, support reached **£30,000 (~€34,918)** per used EV;
- Transport Scotland planned to reduce the cap to **£25,000 (~€29,099) in 2024/25** to support more households with the available budget;
- the final 2025/26 rules reduced it further to **£23,000 (~€26,771)**.

This progressive reduction is a deliberate example of moving policy towards **more affordable vehicle categories**.

Financial support / public cost

Individual household

0% interest loan:

- used electric car: up to **£23,000 (~€26,771)**
- used electric van: up to **£23,000 (~€26,771)**
- electric motorcycle/moped: up to **£5,000 (~€5,820)**
- repayment: up to **6 years** in the final scheme.

Because the loan principal is repaid, the full £23,000 should **not be interpreted as subsidy expenditure per EV**.

Government's actual net cost consists mainly of:

- financing/opportunity cost;
- administration;
- defaults and unrecovered balances;
- any concession created by charging 0% rather than a commercial rate.

This makes it structurally much more budget-efficient than an equivalent £23,000 grant.

Programme funding

- **2024/25:** £15 million (~€17.5 million) of existing loan repayments were recycled into the programme.
- **2025/26: £20 million (~€23.3 million) of existing repayments** were used.
- Transport Scotland separately announced **over £20 million for EV loan schemes in 2025/26**, covering the Used EV Loan plus taxi and van loan streams.

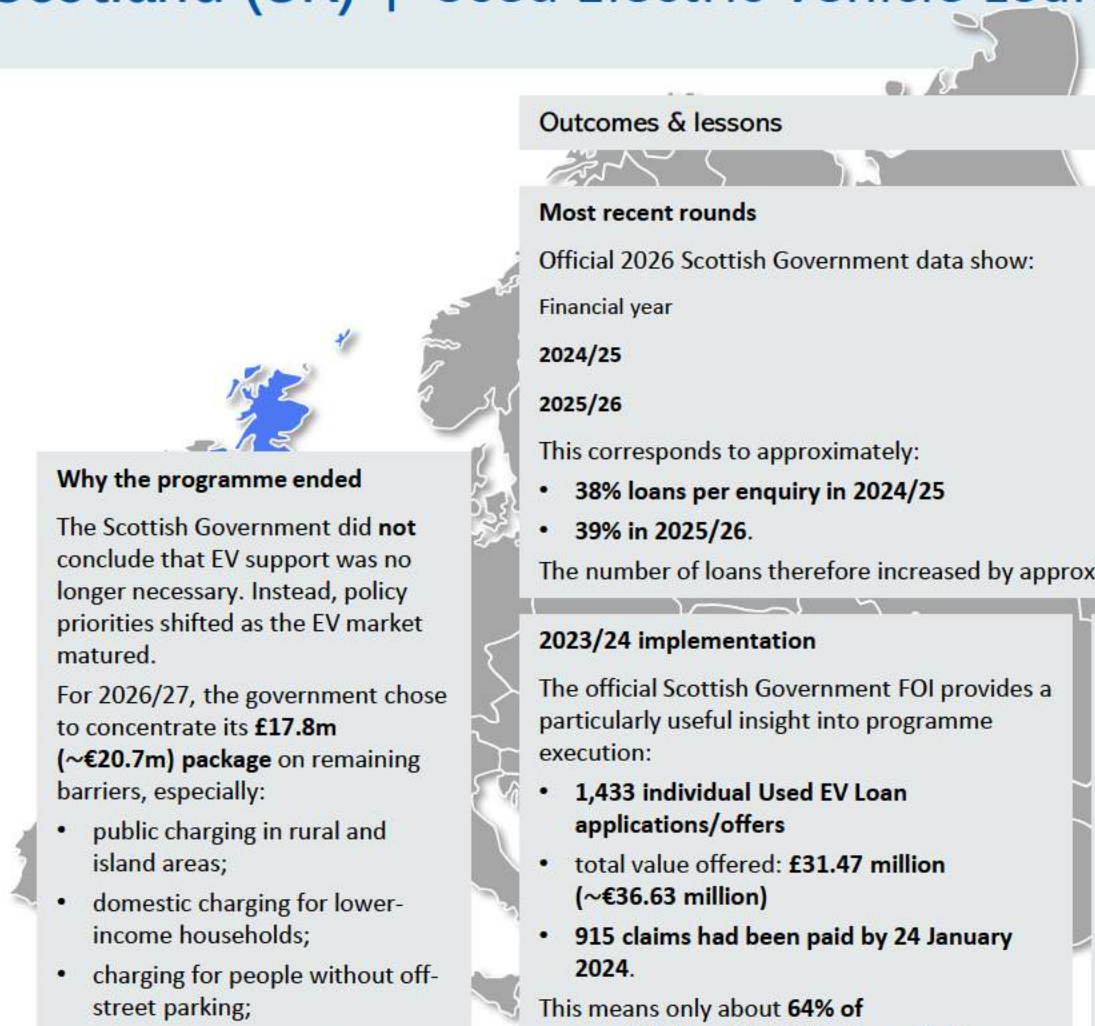
Cumulative Low Carbon Transport Loan programme

From **2011 to 2026**:

- **£251,521,267 (~€292,756,921)** provided;
- **9,621 interest-free loans**;
- **9,735 ultra-low- and zero-emission vehicles supported**.

The £251.5m is capital lent, not £251.5m of grants.

Scotland (UK) | Used Electric Vehicle Loan



Outcomes & lessons

Most recent rounds

Official 2026 Scottish Government data show:

Financial year	Enquiries	Loans awarded
2024/25	**1,741**	**661**
2025/26	**1,959**	**767**

This corresponds to approximately:

- **38% loans per enquiry in 2024/25**
- **39% in 2025/26**.

The number of loans therefore increased by approximately **16% year-on-year**, from 661 to 767.

Why the programme ended

The Scottish Government did **not** conclude that EV support was no longer necessary. Instead, policy priorities shifted as the EV market matured.

For 2026/27, the government chose to concentrate its **£17.8m (~€20.7m) package** on remaining barriers, especially:

- public charging in rural and island areas;
- domestic charging for lower-income households;
- charging for people without off-street parking;
- flatted developments;
- rural and island workplace charging.

2023/24 implementation

The official Scottish Government FOI provides a particularly useful insight into programme execution:

- **1,433 individual Used EV Loan applications/offers**
- total value offered: **£31.47 million (~€36.63 million)**
- **915 claims had been paid by 24 January 2024**.

This means only about **64% of approved/offered individual loans had translated into paid claims by that date**, although claims could still be submitted later in the financial year.

Administrative processing was a challenge:

- **81% of claims** had taken longer than the stated 15-working-day processing period;
- average processing time: **22 working days**;
- incorrect documentation and identity-verification issues were cited as major causes;
- only **13 complaints** were recorded.

This is highly relevant for implementation because it shows that an apparently simple 0% loan can still create significant **application, verification and transaction complexity**.

Key lessons

1. **Scotland provides the strongest European precedent for a 0% used-EV facility.**
   It demonstrates that government can reduce financing costs without turning the entire vehicle value into a non-repayable subsidy.
2. **Used vehicles substantially improved accessibility.**
   The final **£23,000 (~€26,771) vehicle ceiling** directly concentrated support on the affordable second-hand market.
3. **Income and geography can be alternative targeting routes.**
   A lower-income urban household and a more transport-dependent rural household can both face affordability problems for different reasons.
4. **A revolving loan can recycle public resources.**
   Scotland explicitly reused **£15m (~€17.5m) of repayments in 2024/25 and £20m (~€23.3m) in 2025/26**, illustrating the central fiscal advantage over grants.
5. **0% finance cannot remove the affordability barrier for everyone.**
   The household still has to repay the principal and pass affordability checks. For the lowest-income households, a **grant + 0% loan combination** is likely to be more effective than a loan alone.
6. **Administrative execution matters.**
   The 2023/24 average claim-processing period of **22 working days** and substantial gap between loan offers and completed claims indicate a need for simple documentation, rapid credit assessment and coordination with dealerships.
7. **Scotland progressively tightened its vehicle-cost ceiling.**
   Moving from around **£30,000 (~€34,918) to £23,000 (~€26,771)** increased the focus on affordable vehicles and enabled limited public resources to reach more households.

Social Climate Fund National Plans | Status as of 1 September 2026

Sweden
Adopted

Latvia
Adopted

Lithuania
Adopted

Greece
Adopted

Malta
Adopted

Luxembourg
Submitted

Netherlands
Submitted

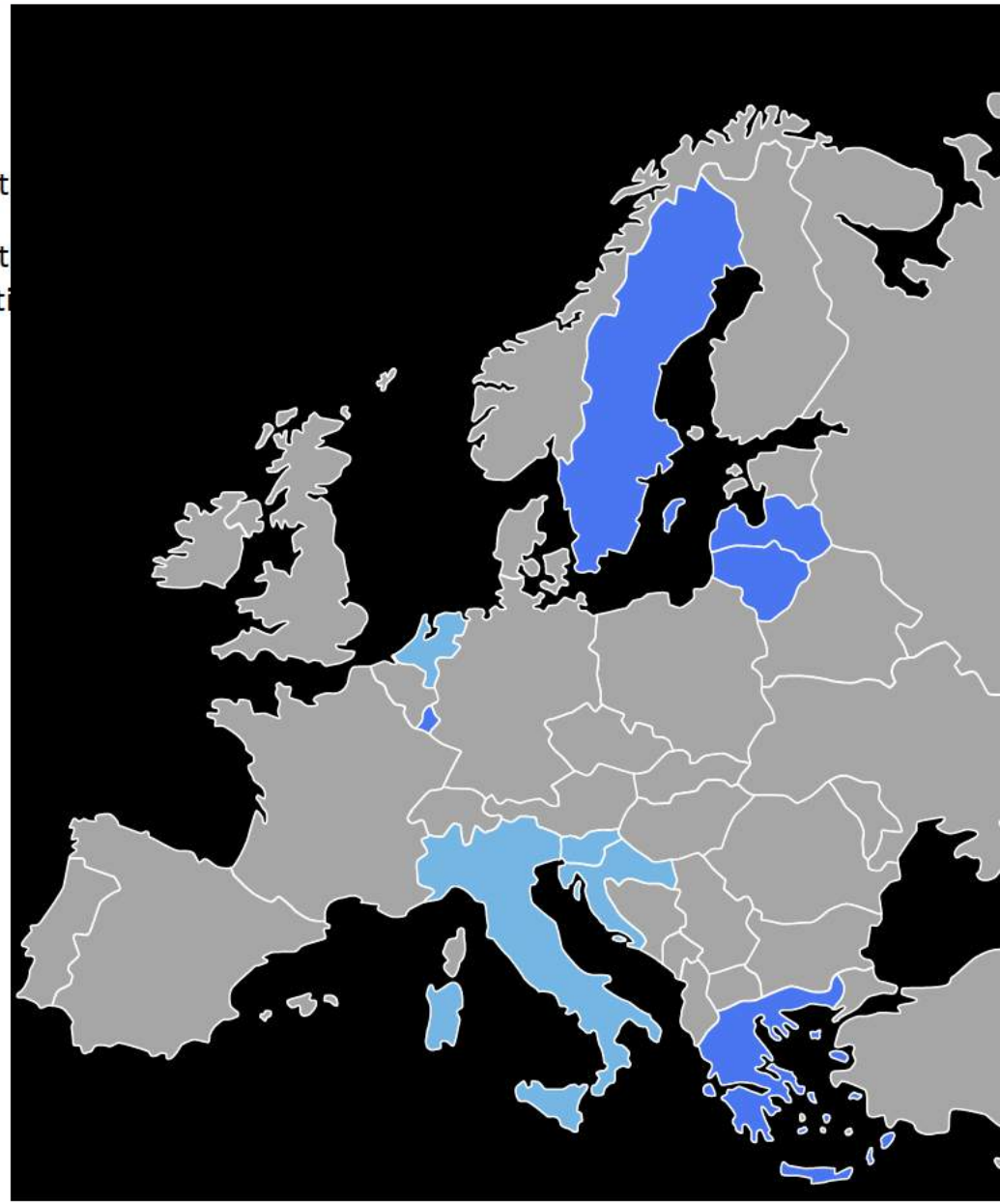
Croatia
Submitted

Slovenia
Submitted

Italy
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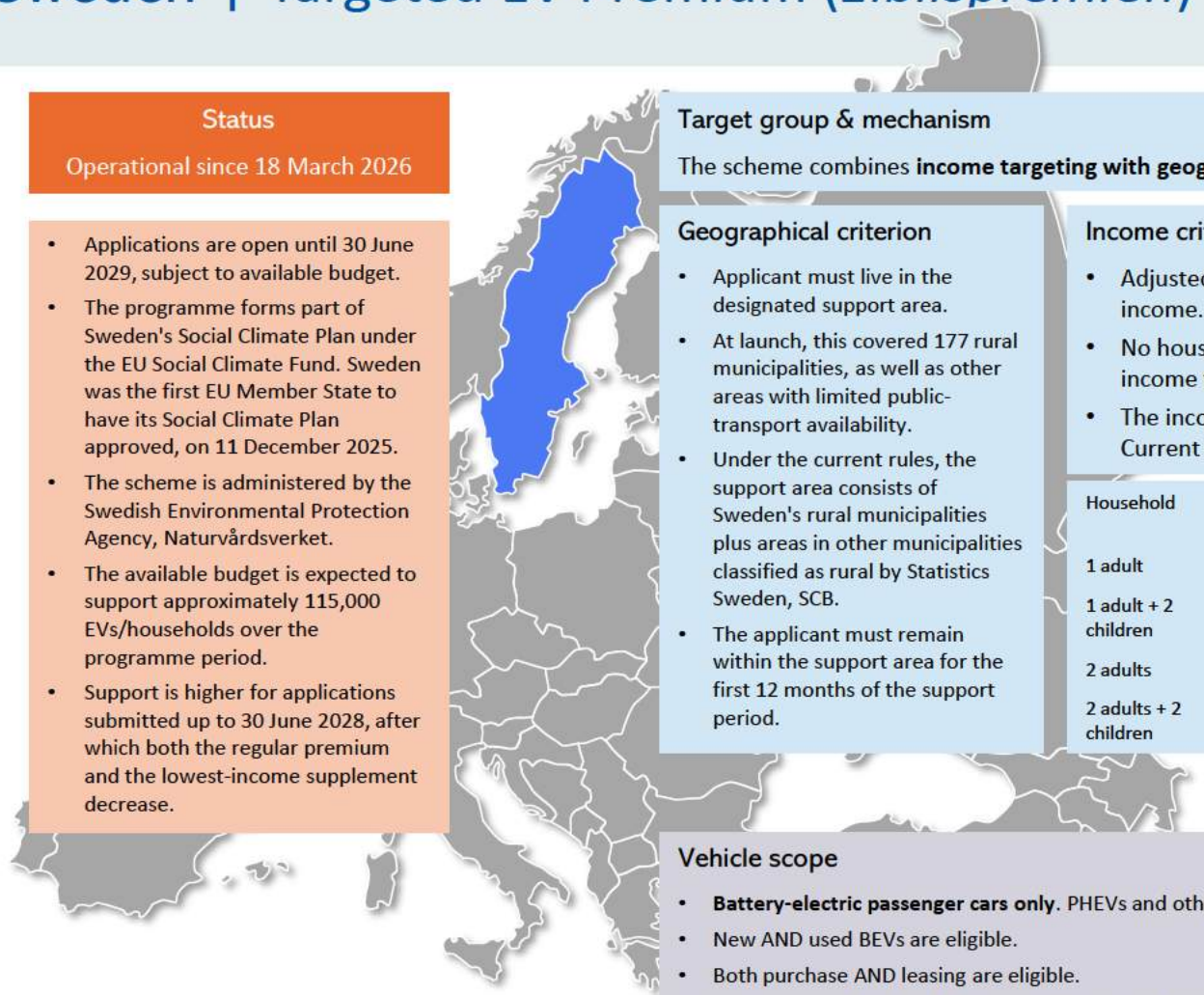


Sweden | Targeted EV Premium (*Elbilspremien*)

Status

Operational since 18 March 2026

- Applications are open until 30 June 2029, subject to available budget.
- The programme forms part of Sweden's Social Climate Plan under the EU Social Climate Fund. Sweden was the first EU Member State to have its Social Climate Plan approved, on 11 December 2025.
- The scheme is administered by the Swedish Environmental Protection Agency, Naturvårdsverket.
- The available budget is expected to support approximately 115,000 EVs/households over the programme period.
- Support is higher for applications submitted up to 30 June 2028, after which both the regular premium and the lowest-income supplement decrease.



Target group & mechanism

The scheme combines **income targeting with geographical targeting of transport-dependent households**.

Geographical criterion

- Applicant must live in the designated support area.
- At launch, this covered 177 rural municipalities, as well as other areas with limited public-transport availability.
- Under the current rules, the support area consists of Sweden's rural municipalities plus areas in other municipalities classified as rural by Statistics Sweden, SCB.
- The applicant must remain within the support area for the first 12 months of the support period.

Income criterion

- Adjusted household income must be ≤80% of the Swedish mean income.
- No household member may have an income high enough to pay state income tax.
- The income ceiling is adjusted according to household composition. Current examples are:

Household	Maximum income for premium	Maximum income for premium + start supplement
1 adult	SEK 372,000 (~€33,429)/year	SEK 232,500 (~€20,893)/year
1 adult + 2 children	SEK 721,680 (~€64,853)	SEK 451,050 (~€40,533)
2 adults	SEK 561,720 (~€50,478)	SEK 351,075 (~€31,549)
2 adults + 2 children	SEK 911,400 (~€81,902)	SEK 569,625 (~€51,189)

Additional targeting

- No one in the household may have owned or leased a BEV or PHEV during the previous 12 months.
- This explicitly targets households entering electric mobility, rather than subsidising existing EV users.
- An applicant can receive the EV premium only once.

Key difference from France: Sweden operationalises car/transport dependence primarily through geography and public-transport accessibility, rather than requiring a specified commuting distance or number of professional kilometres.

Vehicle scope

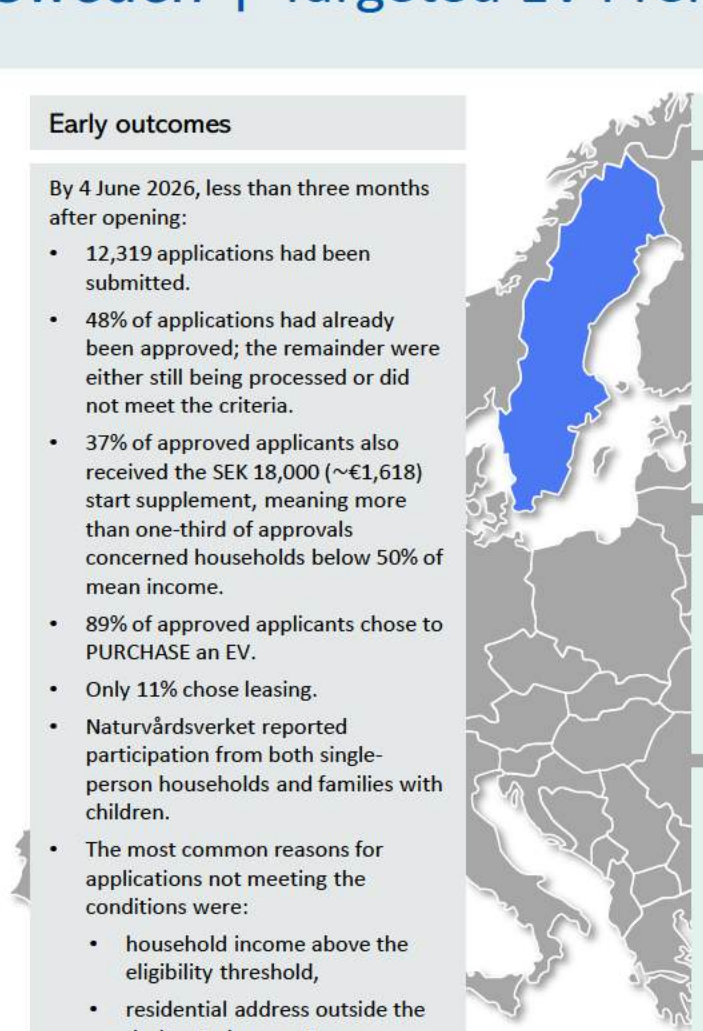
- **Battery-electric passenger cars only**. PHEVs and other hybrids are excluded.
- New AND used BEVs are eligible.
- Both purchase AND leasing are eligible.
- For a purchase, the final transaction price must be between: SEK 64,800 (~€5,823) minimum, and SEK 450,000 (~€40,439) maximum.
- For leasing, the monthly lease price must be between: SEK 1,800 (~€162)/month, and SEK 4,600 (~€413)/month.
- The beneficiary must remain registered as owner or lessee of the vehicle throughout the 36-month support period.
- The car must be a registered passenger car, operational and without a driving ban.
- It cannot be used for business activities.

Sweden | Targeted EV Premium (*Elbilspremien*)

Early outcomes

By 4 June 2026, less than three months after opening:

- 12,319 applications had been submitted.
- 48% of applications had already been approved; the remainder were either still being processed or did not meet the criteria.
- 37% of approved applicants also received the SEK 18,000 (~€1,618) start supplement, meaning more than one-third of approvals concerned households below 50% of mean income.
- 89% of approved applicants chose to PURCHASE an EV.
- Only 11% chose leasing.
- Naturvårdsverket reported participation from both single-person households and families with children.
- The most common reasons for applications not meeting the conditions were:
  - household income above the eligibility threshold,
  - residential address outside the designated support area.



Financial support / public cost

Applications from 18 March 2026 to 30 June 2028

- Regular premium: SEK 1,300 (~€117)/month for 36 months
- Total regular support: SEK 46,800 (~€4,206)
- Households below 50% of mean income receive an additional upfront SEK 18,000 (~€1,618) start supplement.
- Maximum support for the lowest-income households:

  SEK 46,800 + SEK 18,000 = SEK 64,800 (~€5,823) per household
- The SEK 18,000 is paid together with the first payment, specifically helping households with the initial acquisition/financing requirement.

Applications from 1 July 2028 to 30 June 2029

Support is deliberately reduced:

- Regular premium: SEK 32,400 (~€2,912) total, equivalent to SEK 900 (~€81)/month for 36 months.
- Lowest-income start supplement: SEK 10,000 (~€899).
- Maximum combined support: SEK 42,400 (~€3,810) per household.

Programme budget

- At launch, the Swedish government allocated SEK 400 million (~€35,945,524) for 2026.
- The government subsequently proposed an additional SEK 100 million (~€8,986,381) for 2026; Parliament approved the spring amending budget on 9 June 2026, increasing the relevant Social Climate Fund appropriation by SEK 100 million specifically to enable more EV-premium decisions.
- The government stated that total support amounts to approximately SEK 5.6 billion (~503,237,336) over 2026-2032.
- Financing is:
  - 75% EU Social Climate Fund
  - 25% Swedish national budget.
- Sweden's total allocation from the EU Social Climate Fund is approximately SEK 4.4 billion (~€395,400,764) for 2026-2032.

Key lessons

1. **Dual targeting can concentrate support.**
   Sweden combines an income ceiling with geographical transport vulnerability. This avoids subsidising all lower-income households regardless of their actual need for a car.
2. **Used EV eligibility substantially widens affordability.**
   The inclusion of used cars is particularly relevant for an income-targeted programme, where the policy objective is social accessibility rather than exclusively stimulating new-EV sales.
3. **Graduated support addresses different affordability barriers.**
   The standard monthly contribution helps with ongoing vehicle costs, while the **SEK 18,000 (~€1,618) upfront supplement** recognises that the lowest-income households face a separate liquidity/down-payment constraint.
4. **Consumers strongly prefer purchase when given the choice.**
   The initial 89% purchase versus 11% leasing split is especially relevant. It suggests that social leasing should not automatically be assumed to be the preferred solution for lower-income households.
5. **A vehicle-price ceiling limits windfall effects.**
   The SEK 450,000 (~€40,439) maximum purchase price prevents public support from flowing to premium EVs, while allowing a broad new and used vehicle market.
6. **Administrative targeting is relatively sophisticated.**
   Naturvårdsverket automatically checks income, household composition, address, previous EV ownership and vehicle-related debt against government registries. This can simplify the application for eligible households, but early rejection data show that complex eligibility criteria can also result in a significant proportion of unsuccessful applications.

Latvia | Social Climate Fund EV Support for Vulnerable Transport Users

Status

Approved / forthcoming, not yet open for applications

The European Commission **endorsed Latvia's Social Climate Plan on 20 July 2026**, making it the third national plan endorsed under the Social Climate Fund.

Overall Social Climate Plan:

- **€617 million total**
- approximately **€462.8 million from the EU Social Climate Fund**
- **25% national co-financing**
- implementation period **2026-2032**.

The specific measure for households, **C2.F.I3: Support for the purchase of zero-emission vehicles for vulnerable transport users**, has a dedicated budget of **€74,854,292**.

Latvia's approved plan sets a milestone to launch the selection/application process in **Q1 2027**.

Targets:

- **2,100 vehicles by Q4 2029**
- **4,696 vehicles by Q4 2031**.

The Commission's general overview says most Latvian SCF investment applications are expected during **2027**, so the exact household application date remains subject to implementing regulations.

Target group & mechanism

The Latvian approach combines **income + geography + existing car dependence**, making it one of the more tightly targeted schemes.

Income criterion

- Household disposable income is assessed **per household member**.
- Maximum income corresponds to the **upper boundary of Latvia's second income quintile**.
- The current reference value used in the approved plan is **€660.19 per household member/month**, based on 2024 data.
- This threshold is intended to be updated as income statistics change.

Geographical / transport-poverty criterion

- Support is limited to areas with a **Transport Poverty Index ≥1.5**.
- The index combines household vulnerability and population density, targeting areas where dependence on private vehicles is particularly high.

Existing vehicle requirement

- Normally, the household must already own an **M1 or N1 internal-combustion vehicle**:
  - at the time of application;
  - for at least **3 months before application**; and
  - the vehicle must have been roadworthy/used in traffic during at least the previous **11 months**.
- The existing ICE vehicle must subsequently be **scrapped or sold**.
- However, **there is no separate scrappage payment** under this SCF measure.
- If the household already owns an EV, it cannot receive the support.

Large-family exception

A person holding the **Latvian Honorary Family Certificate** can qualify without already owning a vehicle if:

- the nearest public-transport stop is **≥2 km away**, or
- public transport operates **fewer than 4 services per day**.

Applications are intended to be processed on a **first-come, first-served basis**.

Vehicle scope

- **BEVs / zero-emission vehicles only**
- Categories:
  - **M1 passenger cars**
  - **N1 light commercial vehicles**
- **New AND used vehicles** are eligible.
- One household may receive support for **one vehicle only**.
- A specific VIN can be publicly supported only once.

Used vehicle criteria

- Maximum age: **7 years**
- Maximum mileage: **150,000 km**.

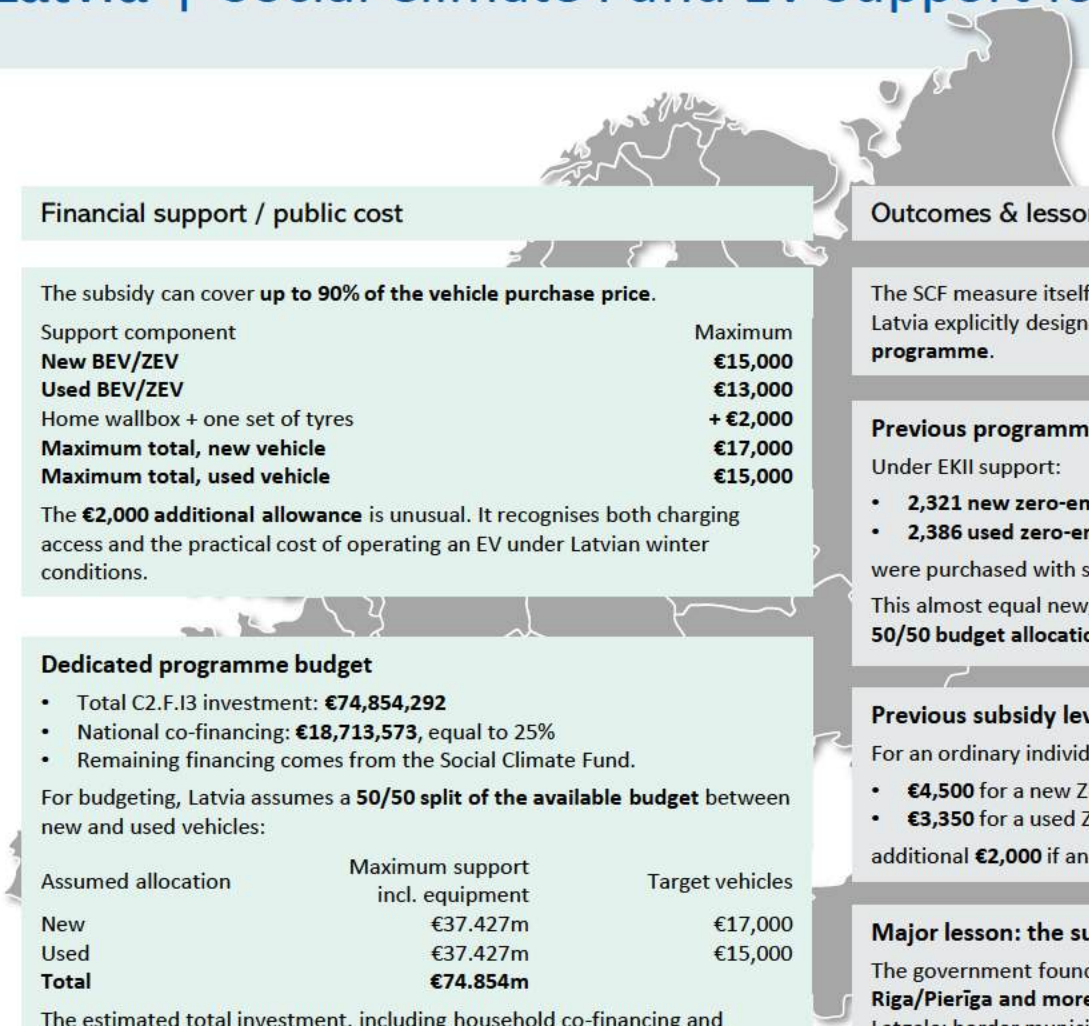
Indicative maximum vehicle prices

Vehicle	Maximum purchase price
New ZEV	€36,000 excl. VAT
Used ZEV	€23,000 excl. VAT

These ceilings are expressly intended to prevent support for luxury vehicles. They are described as **indicative in the approved plan**, with final values to be fixed in the implementing regulation.

- Supported vehicles will be subject to **5 years of monitoring**.
- VAT is not eligible for SCF financing. Latvia will consider whether VAT could instead be supported fully or partly from national resources.

Latvia | Social Climate Fund EV Support for Vulnerable Transport Users



Financial support / public cost

The subsidy can cover **up to 90% of the vehicle purchase price**.

Support component	Maximum
New BEV/ZEV	**€15,000**
Used BEV/ZEV	**€13,000**
Home wallbox + one set of tyres	**+ €2,000**
Maximum total, new vehicle	**€17,000**
Maximum total, used vehicle	**€15,000**

The **€2,000 additional allowance** is unusual. It recognises both charging access and the practical cost of operating an EV under Latvian winter conditions.

Dedicated programme budget

- Total C2.F.I3 investment: **€74,854,292**
- National co-financing: **€18,713,573**, equal to 25%
- Remaining financing comes from the Social Climate Fund.

For budgeting, Latvia assumes a **50/50 split of the available budget** between new and used vehicles:

Assumed allocation	Maximum support incl. equipment	Target vehicles
New	€37.427m	€17,000
Used	€37.427m	€15,000
Total	**€74.854m**	

The estimated total investment, including household co-financing and assuming the indicative vehicle-price ceilings, could reach approximately **€146.01 million excluding VAT**.

Outcomes & lessons from previous support

The SCF measure itself has **not yet started**, so it has no beneficiary outcomes. However, Latvia explicitly designed it using experience from its previous **EKII EV support programme**.

Previous programme uptake

Under EKII support:

- **2,321 new zero-emission vehicles**
- **2,386 used zero-emission vehicles**

were purchased with support.

This almost equal new/used split is the main reason the SCF financial model assumes a **50/50 budget allocation** between new and used vehicles.

Previous subsidy level

For an ordinary individual:

- **€4,500** for a new ZEV
- **€3,350** for a used ZEV

additional **€2,000** if an existing ICE vehicle was scrapped.

Major lesson: the subsidy was not sufficient for poorer regions

The government found a strong geographic concentration of beneficiaries around **Riga/Pierīga and more densely populated regions**, while uptake was much lower in: Latgale; border municipalities in Kurzeme; Zemgale; and Vidzeme.

The approved SCF plan explicitly concludes that lower purchasing power in these regions meant that **even the previous €4,500/€3,350 subsidy plus €2,000 scrappage support was insufficient to make an EV realistically attainable**.

This finding directly informed the much higher SCF subsidy of **up to €15,000/€13,000 plus €2,000** and the new combination of **income and geographic targeting**.

Key lessons

1. **Latvia provides a strong model of multidimensional targeting.** Income, geography and actual vehicle dependence all matter.
2. **Used EVs receive almost the same support as new EVs.** The €13,000 versus €15,000 ceiling places used vehicles at the centre of the social policy rather than treating them as secondary.
3. **Previous experience demonstrates why a modest general subsidy may fail lower-income households.** Latvia explicitly concluded that €3,350-€4,500 was insufficient for households in lower-income regions.
4. **The existing-ICE condition is a strong additionality mechanism.** It targets households already dependent on fossil-fuel cars rather than households acquiring an additional vehicle.
5. **Charging is integrated into the household package.** Up to €2,000 can finance the wallbox and tyres rather than leaving charging affordability to a separate policy.

Lithuania | Social Climate Fund Support for BEVs

Status

Approved / forthcoming, not yet operational

The European Commission **endorsed Lithuania's Social Climate Plan on 5 June 2026**, the second national plan approved under the Social Climate Fund.

Total Social Climate Plan:

- **€884.2 million**
- **€662.9 million EU Social Climate Fund**
- remainder financed by Lithuania
- implementation through 2032.

The specific household EV measure is **C2.F.I5: Promotion of the use of zero-emission light passenger vehicles**.

Dedicated investment: **€59.96 million**.

Planned application launch: **Q1 2027**.

Targets:

- **810 BEVs by Q4 2029**
- **3,650 BEVs by Q2 2032**
- of the final target:
  - **2,020 new**
  - **1,630 used**.



Target group & mechanism

The programme is designed for **vulnerable transport users who are also genuinely dependent on a private car**.

Income and asset criterion

At national level, a vulnerable transport user must meet:

- household income of **≤2 VRP per household member**, or
- **≤3 VRP for a person living alone**;
- plus the applicable statutory **asset test**.

For 2026, Lithuania's *Valstybės remiamos pajamos* (VRP) is **€233/month**, which corresponds to:

- **€466/month per member of a multi-person household**
- **€699/month for a single-person household**.

Geographic criterion

The household must live in a municipality where the **Country-squared accessibility poverty gap exceeds 0.4**.

This effectively covers **54 municipalities**, while residents of Lithuania's six largest cities are excluded: Vilnius, Kaunas, Klaipėda, Šiauliai, Panevėžys, and Alytus.

The plan identified **225,553 vulnerable transport-user households, representing 450,162 people, in 2024**.

Additional car-dependence test

For the individual BEV measure, the target group is further narrowed to households dependent on a personal vehicle for **family or health reasons**, particularly:

- families with **2 or more children**;
- single parents;
- persons with special needs/disabilities.

This means that the BEV subsidy is not intended for every person who meets the general transport-poverty definition.

Replacement condition

The plan states that giving up an existing polluting vehicle through **scrappage or replacement/sale will be a mandatory condition**, with a scrappage or sale certificate to be verified by APVA.

Vehicle scope

- **BEVs only**, no PHEVs.
- **M1 passenger cars**.
- **New AND used** vehicles.
- One household may receive support for **one BEV**.
- One VIN can receive support only once.

Definition of new

A vehicle is considered new where no more than **6 months** have elapsed between first registration and registration in the applicant's name.

Preliminary used-BEV criteria

The detailed plan proposes:

- maximum age: approximately **6 years**
- maximum mileage: **120,000 km**
- minimum practical range: around **150-200 km**
- battery degradation should not exceed approximately **15-20%**.

The plan is explicit that some of these technical thresholds remain to be finalised in the implementing financing rules.

Preliminary vehicle-price bands

Vehicle	Indicative purchase-price range/ceiling
New BEV	approximately **€25,000-€35,000 excl. VAT**
Used BEV	approximately **€15,000-€20,000 excl. VAT**

These are planning assumptions rather than final statutory ceilings.

Purchase or leasing

Lithuania plans to allow both direct acquisition **and leasing**.

For direct purchase:

- subsidy is paid at the moment of purchase;
- APVA intends to transfer the public contribution **directly to the vehicle seller**, based on a tripartite arrangement.

For leasing:

- APVA can pay the **initial contribution and subsequent subsidy instalments**;
- all supported leasing contracts must be completed by **Q2 2032**;
- the vulnerable household must become the **owner of the BEV at the end**.

This is a particularly relevant liquidity feature.

Lithuania | Social Climate Fund Support for BEVs

Financial support / public cost

The Commission-approved programme summary states that eligible vulnerable and car-dependent households can receive support covering **up to 90% of the BEV purchase price**.

The detailed household measure specifies:

Vehicle	Maximum grant
New BEV	**€20,000**
Used BEV	**€12,000**

Important technical caveat: the main operational description of C2.F.I5 and the Commission's endorsed summary say **up to 90% for new and used vehicles**. One cost-calculation section of Lithuania's March 2026 plan models the used-BEV contribution at up to 100%. Until Lithuania issues the final 2027 financing rules, **90% should be used on the slide as the authoritative headline rate**.

Dedicated EV budget

- **€59.96 million** total investment for vulnerable-household BEVs.
- Expected:
  - **2,020 new BEVs**
  - **1,630 used BEVs**
  - **3,650 total**.

The planning assumptions envisage:

- 2027: **160 vehicles**
- 2028: **250**
- 2029: **400**
- 2030: **620**
- 2031: **920**
- 2032: **1,300**

for a cumulative **3,650 vehicles**.

The plan also allows the subsidy level to be **reduced from 2030** if uptake is ahead of target and vehicle prices fall materially. An example given is a 20% reduction to:

- **€16,000 new**
- **€9,600 used**.

Separate charging support

Charging is funded through a separate SCF measure. The Lithuanian plan envisages up to **100% of private charging-point acquisition and installation costs**, capped at approximately **€1,450 excluding VAT**, for vulnerable households acquiring a BEV under C2.F.I5.

Outcomes & lessons from existing Lithuanian EV support

Like Latvia, the **SCF measure itself has not yet started**. However, Lithuania has a substantial existing EV subsidy programme that provides useful evidence.

Modernisation Fund programme, 2022-2026

Since **2 June 2022**, private individuals have been able to receive:

- **€5,000 for a new BEV**
- **€2,500 for a used BEV**, originally up to 4 years old.
- Original programme envelope: **€35 million**
- Original target: **10,500 BEVs**.

Unlike the forthcoming SCF scheme, this programme is **not income-targeted**.

Strong preference for used vehicles

By **January 2026**, APVA reported support paid for:

- approximately **6,000 used BEVs**
- approximately **2,600 new BEVs**.

By **28 April 2026**, this had increased to approximately:

- **7,000 used BEVs**
- **3,000 new BEVs**
- approximately **10,000 vehicles in total**
- **€32.7 million paid to households**.

Thus, roughly **70% of supported household vehicles were used BEVs**, providing particularly strong empirical support for including the second-hand market in a socially targeted scheme.

Funds were close to exhaustion

The original €35m household programme was approaching its limit in 2026, and Lithuania subsequently made additional financing available. In July 2026, APVA announced another **€20m** package, of which:

- **€12m for individuals**
- **€8m for legal/public-sector applicants**.

Administrative lesson

Lithuania's existing application procedure is highly automated. The applicant enters basic data and the **VIN**, while APVA retrieves vehicle data automatically from the national **Regitra** register. APVA states that this allows eligibility to be assessed in a matter of minutes.

The SCF programme intends to build on this existing administrative architecture rather than create an entirely new delivery system.

Key lessons

1. **High support can overcome the upfront affordability barrier.**
   Lithuania plans to cover **up to 90% of the BEV purchase price**, showing that substantial support can be justified when eligibility is tightly focused on vulnerable, car-dependent households.
2. **Used BEVs can be central to a socially targeted scheme.**
   Both new and used BEVs are eligible, and Lithuania's existing EV subsidy programme shows that lower-cost used vehicles can attract strong demand.
3. **Income targeting works better when combined with transport dependence.**
   Lithuania combines income, assets, geography and household circumstances, helping direct support to people with limited alternatives to private car use.
4. **Point-of-sale support and leasing can reduce liquidity barriers.**
   Direct payment to the seller and support through leasing can avoid requiring lower-income households to advance the subsidy themselves.
5. **EV support combined with charging and alternative mobility.**
   Lithuania integrates vehicle support with charging infrastructure, public transport, rural on-demand transport and micromobility, reducing the risk of treating private EV ownership as the only solution to transport poverty.

Greece | Social Leasing for Electric Vehicles

Status

Approved / forthcoming, not yet open for household applications as of 31 August 2026.

The European Commission **endorsed Greece's Social Climate Plan on 27 August 2026**, making Greece the **fifth Member State** with an approved plan.

The Greek Social Climate Plan runs **2026-2032** and has:

- **€4.77 billion total budget**
- **€3.58 billion EU Social Climate Fund contribution, 75%**
- **€1.19 billion Greek contribution, 25%**.

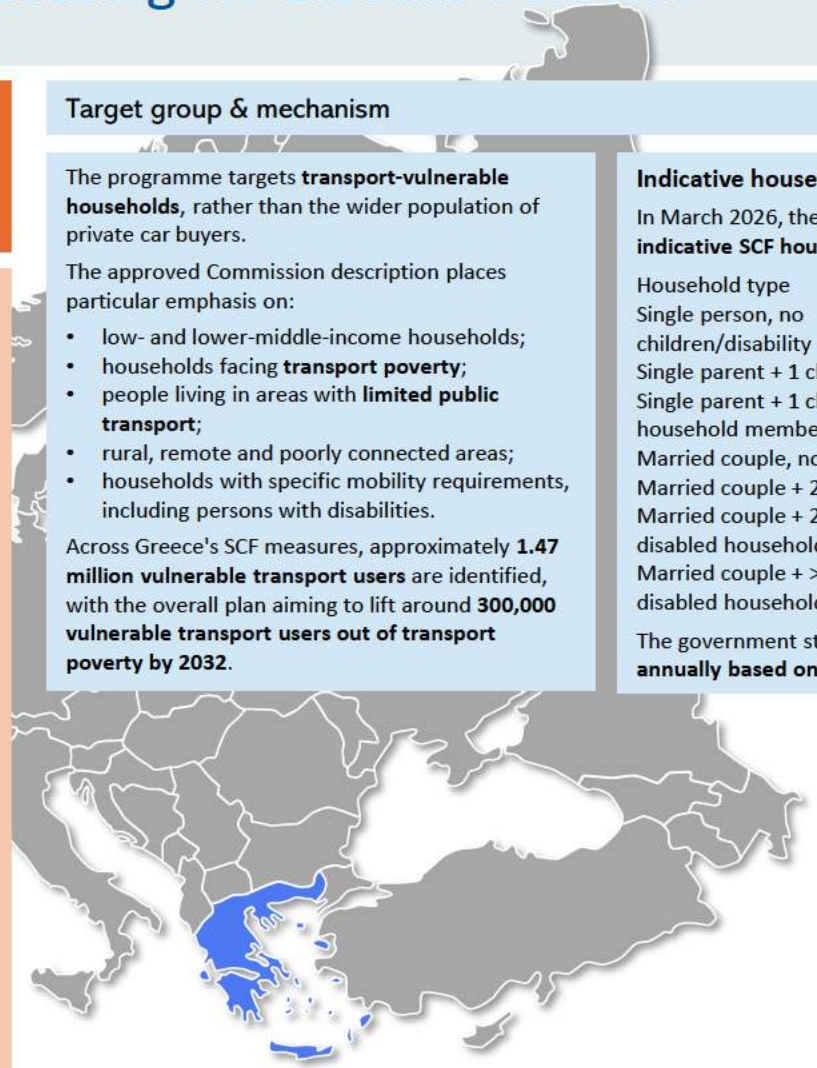
Road-transport investments account for approximately **€1.46 billion** of the plan.

The **final Commission-endorsed plan allocates €165.3 million to Social Leasing**, targeting **15,000 transport-vulnerable households**.

The Greek government's 27 August implementation announcement refers to this as approximately **€170 million for 15,000 households** and confirms that the Ministry of Infrastructure and Transport is preparing the programme for launch.

Greece will be able to request its **first SCF payment in Q1 2027**, after implementation starts and initial milestones/results are achieved.

Important: the programme is now formally approved at EU level, but the **final implementing call, exact application date, final eligible-car list and detailed leasing contract have not yet been published**.



Target group & mechanism

The programme targets **transport-vulnerable households**, rather than the wider population of private car buyers.

The approved Commission description places particular emphasis on:

- low- and lower-middle-income households;
- households facing **transport poverty**;
- people living in areas with **limited public transport**;
- rural, remote and poorly connected areas;
- households with specific mobility requirements, including persons with disabilities.

Across Greece's SCF measures, approximately **1.47 million vulnerable transport users** are identified, with the overall plan aiming to lift around **300,000 vulnerable transport users out of transport poverty by 2032**.

Indicative household income thresholds

In March 2026, the Greek government published the following **indicative SCF household-income limits**:

Household type	Indicative annual income ceiling
Single person, no children/disability	**€10,500**
Single parent + 1 child	**€13,650**
Single parent + 1 child + disabled household member	**€16,650**
Married couple, no children	**€20,800**
Married couple + 2 children	**€27,100**
Married couple + 2 children + disabled household member	**€30,100**
Married couple + >3 children + disabled household member	**€36,400**

The government stated that these thresholds would be **updated annually based on tax-return data**.

Delivery mechanism

- Beneficiary leases an EV for **4 years / 48 months**.
- Household monthly payment is intended to be **no more than €150/month**.
- Government support is paid against the leasing cost, materially reducing the amount paid by the household.
- A new **Energy Support Register for Households** is being created to identify eligible vulnerable households.
- Registered households are intended to receive a **"vulnerable household card"**, facilitating access to SCF programmes and reducing repeated administrative checks.
- One-stop shops are also planned in **each Greek region** to assist vulnerable households, particularly people with limited digital skills.

This administrative infrastructure is potentially important for implementation because it separates **eligibility verification from the vehicle transaction itself**.

Vehicle scope

The programme concerns **zero-emission electric passenger vehicles under long-term leasing**.

The Greek government has specified that:

- beneficiaries will select their vehicle from a **publicly available list of eligible models**;
- the list will focus on the **cheapest electric models available on the market**;
- lease duration is **4 years**;
- the final programme is intended also to consider a mechanism allowing the beneficiary to **acquire the vehicle after the leasing period**.

The March design explicitly stated that beneficiaries would choose among the lowest-priced EVs on an approved list.

New versus used

The currently published government and Commission material **does not establish used EV eligibility** for the Social Leasing programme.

This is an important difference from **Sweden**, for instance, where used-EV eligibility is already explicitly established.

Greece | Social Leasing for Electric Vehicles

Financial support / public cost

Final approved programme

The Commission-endorsed Social Climate Plan provides:

- **€165.3 million** for Social Leasing;
- **15,000 transport-vulnerable households**.

This corresponds to an indicative programme envelope of approximately:

€165.3m / 15,000 = €11,020 per targeted household.

The Greek government's implementation announcement rounds the programme to:

- approximately **€170 million**
- **15,000 households**
- monthly household leasing cost **≤€150**
- **4-year lease**.

Important evolution from the March 2026 draft

The design presented by the Greek government in **March 2026**, before Commission approval, was more explicit:

March 2026 design	Amount
Programme budget	**€174m**
Target households	**12,500**
Average subsidy / beneficiary	**€13,000**
Additional support for person with disability	**+€2,000**
Home-charger contribution	**+€500**
Lease duration	**4 years**
Target household payment	**≤€150/month**

The government even published a worked example:

- four-year total leasing cost: **€20,000**
- public Social Leasing contribution: **€13,000**
- household residual leasing cost: **€7,000**
- equivalent household payment: approximately **€145/month**
- plus **€500 contribution towards a home charger**.

The final Commission-approved programme has changed from **March:** €174m / 12,500 households to **August:** €165.3m / 15,000 households.

Therefore, the **€13,000 average subsidy, €2,000 disability supplement and €500 charger allowance belong to the earlier programme design**. Until Greece publishes the final implementing call, **those amounts should not be treated as final 2026 programme entitlements**.

Outcomes & lessons from previous programmes

There is **no previous Greek Social Leasing cycle**, so there are no actual uptake or beneficiary results yet.

However, Greece already operates a large national EV purchase/leasing programme, **Kinoumai Ilektrika III**, which provides useful implementation context.

Current *Kinoumai Ilektrika III*

This is a **general EV programme, not an income-targeted measure**.

For a private individual purchasing or long-term leasing an electric passenger car:

- base subsidy: **€3,000**
- vehicle retail price before tax must be **≤€50,000**
- voluntary scrappage of old vehicle: **+€1,500**
- smart home charger: **+€400**
- person with disability: **+€1,000**
- young person ≤29: **+€500**
- family with 3 dependent children: **+€1,000**
- family with >3 dependent children: **+€2,000**.

Applications for the current configuration are accepted until **31 December 2026 or earlier if the programme budget is exhausted**.

Current budget utilisation

As of **28 July 2026**, the official platform showed:

- total *Kinoumai Ilektrika III* budget: **€76.0m**
- remaining available budget: **€9.83m**
- private-household budget: **€48.0m**
- remaining household allocation: **€5.52m**
- private vehicle allocation: **€45.39m**
- remaining private vehicle allocation: **€5.48m**.

This demonstrates strong uptake and also shows that **budget exhaustion is a practical programme-management issue**.

Experience from *Kinoumai Ilektrika II*

The Greek government reported that from **November 2023** onward, around **€28 million** had been paid to approximately **8,250 beneficiaries** under the second programme cycle.

The programme repeatedly recycled or reallocated unused funds and reopened applications as resources became available, illustrating the administrative importance of actively managing unused or cancelled commitments.

Key lessons

1. Greece is becoming one of the closest European comparators to France.
Both approaches use a **heavily subsidised long-term EV lease with a strict monthly affordability target**. Greece's headline ceiling of **€150/month** is even tighter than France's €200 maximum.

2. Transport vulnerability is more important than income alone.
The scheme sits within an SCF architecture that combines **income, social circumstances and geography**, with particular concern for households with limited public transport access.

3. A curated affordable-vehicle list can replace a simple price ceiling.
Rather than allowing any EV below an arbitrary threshold, Greece plans to publish a list focused on the **cheapest EVs available**.

4. €150/month provides a clear household-facing affordability benchmark.
This is easier for a beneficiary to understand than a subsidy expressed solely as €x per vehicle.

5. Greece intends to combine vehicle and charging support.
The earlier design included **€500 for a home charger**, while the approved overall SCF additionally allocates **€135m for 4,400 publicly accessible charging points**, specifically including areas underserved by the market.

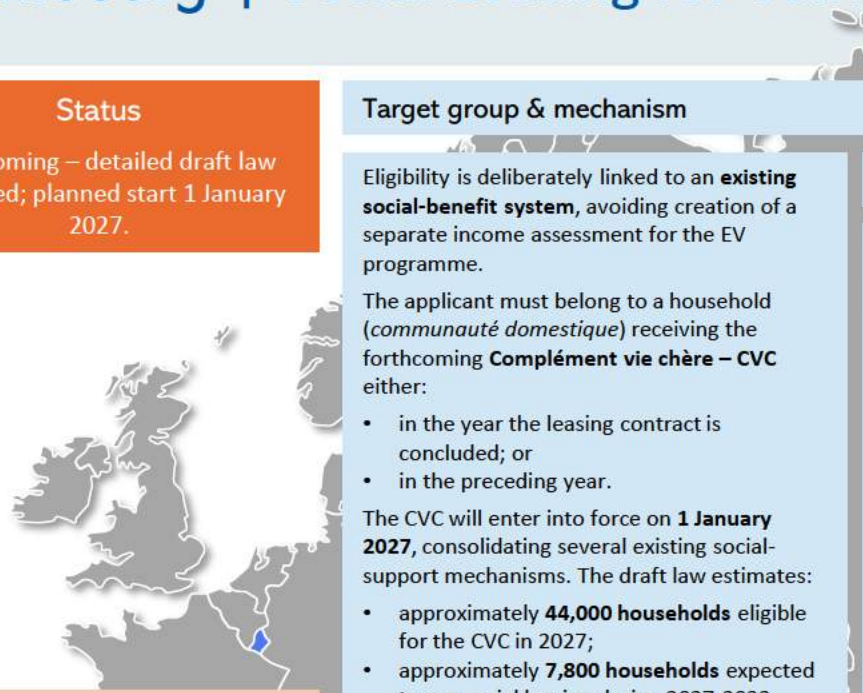
6. Special treatment of disability and family composition is built into the targeting framework.
This is relevant to the concerns about larger households and households with specific mobility requirements.

7. The change between the March draft and August-approved programme is itself a useful lesson.
The target expanded from **12,500 to 15,000 households**, while the dedicated budget fell from **€174m to €165.3m**. Final implementing parameters can therefore change materially during Commission assessment and national programme design.

Luxembourg | Social Leasing for Vulnerable Households

Status

Forthcoming – detailed draft law deposited; planned start 1 January 2027.



- Luxembourg's Social Climate Plan is currently listed by the Commission as **submitted and under assessment**.
- The government committed under the June 2026 **Resilienzpak** to introduce social leasing from **1 January 2027.**
- Government approved the social-leasing bill on **17 July 2026**.
- Draft law **No. 8803** was deposited in Parliament on **24 July 2026** and remains at the **"Déposé(e)"** stage.
- Proposed programme period: **1 January 2027 – 31 December 2032.**

Target group & mechanism

Eligibility is deliberately linked to an **existing social-benefit system**, avoiding creation of a separate income assessment for the EV programme.

The applicant must belong to a household (*communauté domestique*) receiving the forthcoming **Complément vie chère – CVC** either:

- in the year the leasing contract is concluded; or
- in the preceding year.

The CVC will enter into force on **1 January 2027**, consolidating several existing social-support mechanisms. The draft law estimates:

- approximately **44,000 households** eligible for the CVC in 2027;
- approximately **7,800 households** expected to use social leasing during 2027-2032.

That corresponds to an indicative planning take-up of about **7,800 / 44,000 ≈ 17.7%** of potentially eligible households over the programme period.

Transitional arrangement

During **2027**, households that received the existing **prime énergie for 2026** can also qualify, ensuring the programme can start before all new CVC certificates have been issued.

One lease per household

- Maximum **one subsidised social-lease contract per household at a time**.
- After the **36-month** contract ends, the household can apply again.

Full operational leasing

This is arguably Luxembourg's most important feature.

The contract duration is **36 months.**

The lease must include at least:

- scheduled maintenance;
- repairs and replacements due to normal wear;
- tyres suitable for **all weather conditions**, including normal replacement;
- road tax;
- vehicle-registration tax;
- comprehensive insurance covering damage, total loss and theft;
- insurance deductible no greater than **2% of insured vehicle value**;
- third-party liability insurance;
- administrative contract management;
- at least **€500 excl. VAT of end-of-contract return damage covered by the leasing company**.

This goes materially further than France, where insurance and some maintenance costs sit outside the advertised social-lease ceiling.

No deposit

The draft law explicitly states:

No initial financial contribution is required.

A household may voluntarily contribute upfront if it wants to reduce the monthly rental, but the leasing company cannot make an upfront payment a programme requirement.

Full pass-through

The entire public subsidy must be transferred to the beneficiary through a **reduction in lease payments**.

Contracts must explicitly state:

- monthly/rental price;
- agreed annual mileage;
- cost of excess kilometres;
- included insurance;
- included services.

Vehicle scope

Luxembourg explicitly includes **new AND used BEVs**.

New vehicle

- pure battery-electric passenger car;
- never previously registered:
  - in Luxembourg; or
  - abroad.

Used vehicle

- pure battery-electric passenger car;
- **at least 3 years old** at the start of the lease;
- must previously have been registered **only in Luxembourg** — an imported used BEV does not meet the draft social-leasing definition.
- Social leasing support can be granted only **once per used vehicle**.

Energy-efficiency criterion

Standard vehicle: **≤160 Wh/km WLTP.**

This deliberately concentrates the scheme on smaller/more efficient vehicles.

Large-family exception

The **160 Wh/km efficiency ceiling does not apply** when:

- vehicle has **at least 7 seats**, including the driver; and
- household contains **at least 5 persons**.

This prevents an efficiency rule from unintentionally excluding larger families that need larger vehicles.

Luxembourg | Social Leasing for Vulnerable Households

Financial support / public cost

The draft law sets two fixed amounts:

Vehicle	Social-leasing aid
New BEV	**€10,800**
Used BEV ≥3 years	**€4,500**

Spread over the mandatory 36-month contract, these correspond arithmetically to:

- new BEV: **€10,800 / 36 = €300/month**
- used BEV: **€4,500 / 36 = €125/month**

of public support embedded in the lease.

Important: Luxembourg does **not set a statutory maximum monthly household lease rate** in the draft law comparable with France's €200 or Greece's €150. The actual monthly price depends on the commercial vehicle and lease offer; the law instead requires **full pass-through and transparency**.

Programme budget

The detailed financial statement estimates **€77.94 million total for 2027-2032.**

Funding:

- **€58.455m Social Climate Fund – 75%**
- **€19.485m Luxembourg Climate and Energy Fund – 25%**.

Planned beneficiaries:

Vehicle	Households	Aid per vehicle	Total
New BEV	**6,800**	€10,800	**€73.44m**
Used BEV	**1,000**	€4,500	**€4.50m**
Total	**7,800**		**€77.94m**

Planned annual expenditure

- 2027: **€14.49m**
- 2028: **€11.25m**
- 2029: **€11.70m**
- 2030: **€11.70m**
- 2031: **€11.70m**
- 2032: **€17.10m**.

For 2027 alone, government assumes:

- **1,300 new BEVs**
- **100 used BEVs**.

The social-leasing grant **cannot be combined with the ordinary Klimabonus Mobilitéit vehicle grant** for the same vehicle.

Outcomes & lessons from existing Luxembourg support

There is **no social-leasing uptake yet**, because the programme is due to begin in 2027.

However, Luxembourg's existing **Klimabonus Mobilitéit** provides an important design precedent.

Under the current general EV scheme:

- efficient new BEV ≤160 Wh/km: **€6,000**
- qualifying 7-seat BEV for household ≥5: **€6,000**
- other qualifying BEVs: **€3,000**
- used BEV ≥3 years: **€1,500**.

So the proposed social-leasing support is materially larger:

Vehicle	General Klimabonus	Social leasing	Increase
Efficient new BEV	€6,000	**€10,800**	**+80%**
Used BEV ≥3 years	€1,500	**€4,500**	**3×**

This illustrates deliberate concentration of more public support on vulnerable households.

Key lessons

1. **Luxembourg may provide the strongest "full-service social leasing" model.**
   The inclusion of maintenance, tyres, taxes, comprehensive insurance and liability insurance makes the household's monthly mobility cost much more predictable than a lease that covers only vehicle financing.
2. **No deposit directly removes the liquidity barrier.**
   This is crucial for households with little or no savings.
3. **Prefinancing avoids reimbursement problems.**
   The leasing company handles the public aid and must pass **100% of it through to the household's rental payments**.
4. **New and used social leasing coexist in one programme.**
   This could give households a lower-cost route without requiring a separate used-EV grant scheme.
5. **The draft program strongly favours new vehicles.**
   The financial plan assumes **6,800 new versus only 1,000 used BEVs** — about **87% new / 13% used**.
6. **The large-family exemption is highly transferable.**
   Maintaining the efficiency rule for most vehicles while exempting a **7-seat vehicle for households ≥5 people** is more targeted than simply raising the vehicle threshold for everyone.
7. **Linking eligibility to an existing social benefit reduces administrative complexity.**
   Rather than calculating a new EV-specific household-income test, the Environment Administration can verify CVC status through existing government data.
8. **Unlike France and Greece, Luxembourg does not regulate the final monthly lease price.**
   The policy controls the **public contribution and required service package**, rather than setting an absolute €150/€200 rental ceiling. This gives market participants more flexibility but creates a stronger need to monitor actual offers.
9. **The full-operational concept reduces hidden-cost risk.**
   For a low-income household, an apparently cheap €150 lease can become unaffordable if insurance, tyres and unexpected maintenance are separate. Luxembourg explicitly incorporates these costs.

Spain | Programa Auto+

Status

Operational nationwide

- The new **Programa Auto+** succeeds the vehicle-purchase element of MOVES.
- Legal framework adopted in **July 2026**; applications for private individuals opened **4 August 2026**.
- 2026 purchases are eligible **retroactively from 1 January 2026**.
- Private-person applications remain open until **31 December 2026**, unless the budget is exhausted earlier.
- The programme itself is established through **31 December 2030**, with annual calls.



- 2026 funding:
  - **€350m** for private individuals, Line 1;
  - **€50m** for businesses/self-employed, Line 2;
  - **€400m total**.

Unlike MOVES, Auto+ is **centrally managed by the national government**, explicitly with the aim of simplifying applications and reducing payment times.

Target group & affordability mechanism

For households, **there is no income test**.

Line 1 is open to adult individuals legally resident in Spain who are not applying as part of an economic activity. One supported vehicle is allowed per beneficiary.

Affordability is instead targeted through the **vehicle**:

- cheaper cars receive a higher part of the maximum grant;
- more highly electrified vehicles receive more;
- vehicles with European production/battery characteristics receive additional support.

For M1 passenger cars:

- **≤€35,000 excl. tax:** economic component = **25% of maximum grant**
- **>€35,000 to €45,000:** economic component = **15%**
- **>€45,000:** not eligible.

There is therefore an explicit incentive to choose a lower-priced EV, although a household earning €25,000 receives exactly the same subsidy as a household earning €100,000 buying the same vehicle.

For new M1/N1 vehicles acquired after the scheme opened, the dealer/manufacturer must also provide a **minimum €1,000 pre-tax commercial discount** linked to Auto+.

Vehicle scope

For private individuals:

- **purchase only** — no private leasing/renting route;
- new vehicles;
- and certain **nearly-new vehicles**, provided no more than **12 months** have elapsed between first registration and invoice;
- M1 passenger cars, N1 vans, motorcycles and quadricycles;
- vehicles must have Spain's **DGT ZERO label**.

Eligible technologies include:

- **BEV**
- FCEV
- PHEV
- EREV.

For the specific affordability comparison, the important limitation is:

Auto+ does not open the mature used EV market. Its "other vehicles" route covers essentially recent dealer vehicles up to 12 months since first registration, rather than 3–6-year-old affordable used BEVs.

There is also **no special household exception for six-/seven-seat cars** under private Line 1: the €45,000 M1 ceiling still applies.

Financial support / public cost

Maximum household M1 grant: **€4,500.**

The exact amount is calculated cumulatively from three criteria.

Criterion	BEV	PHEV/EREV
Electrification	50%	25%
Price ≤€35k	+25%	+25%
Price €35–45k	+15%	+15%
EU final assembly	+15%	+15%
Qualifying European/sustainable battery criteria	+10%	+10%

Applied to the €4,500 maximum, illustrative BEV support becomes:

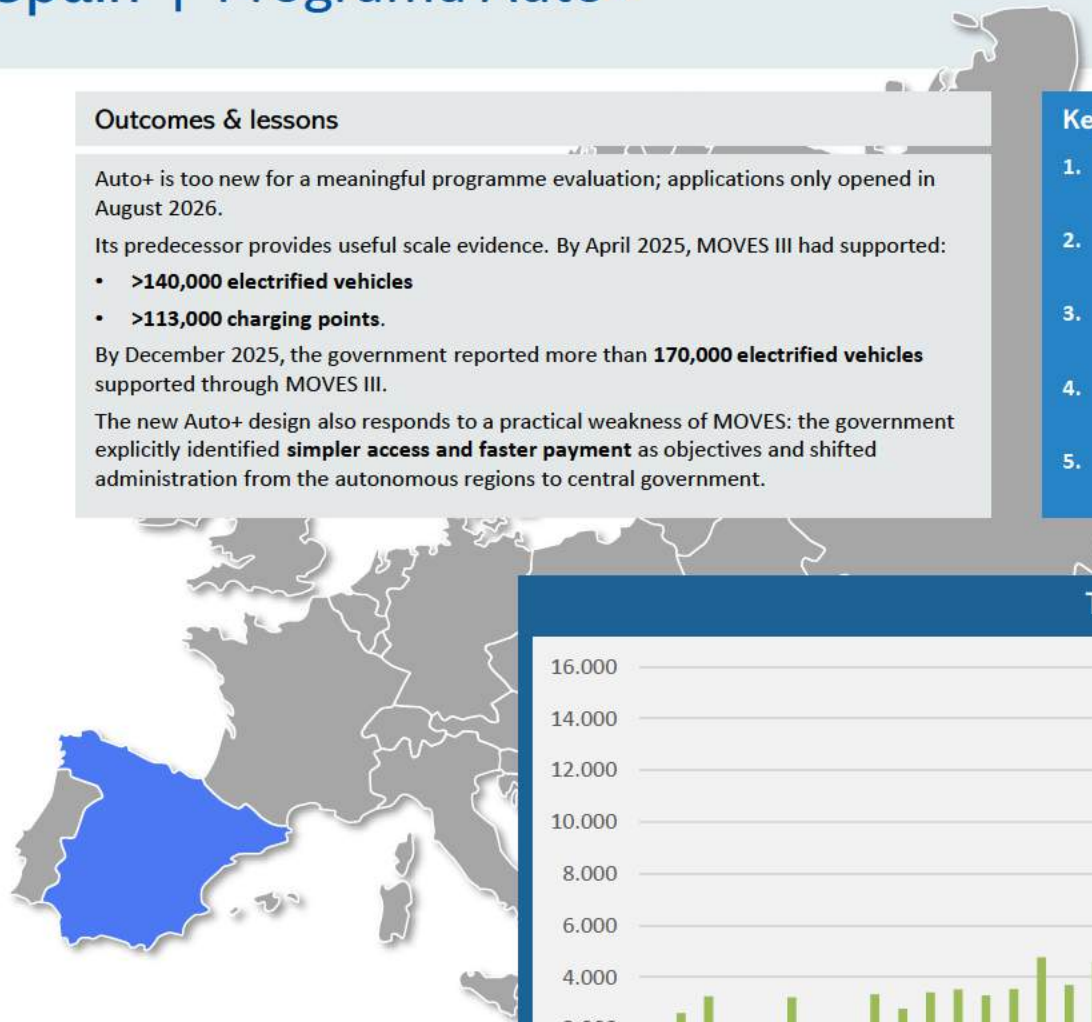
BEV	Grant
≤€35k + full European criteria	**€4,500**
€35–45k + full European criteria	**€4,050**
≤€35k without European component	**€3,375**
€35–45k without European component	**€2,925**

The maximum price benefit on a qualifying **new** low-priced BEV can therefore reach approximately:

€4,500 public grant + ≥€1,000 dealer discount = ≥€5,500.

The vehicle prices used for the Auto+ threshold are invoice prices **excluding taxes**, after commercial discounts.

Spain | Programa Auto+



Outcomes & lessons

Auto+ is too new for a meaningful programme evaluation; applications only opened in August 2026.

Its predecessor provides useful scale evidence. By April 2025, MOVES III had supported:

- **>140,000 electrified vehicles**
- **>113,000 charging points**.

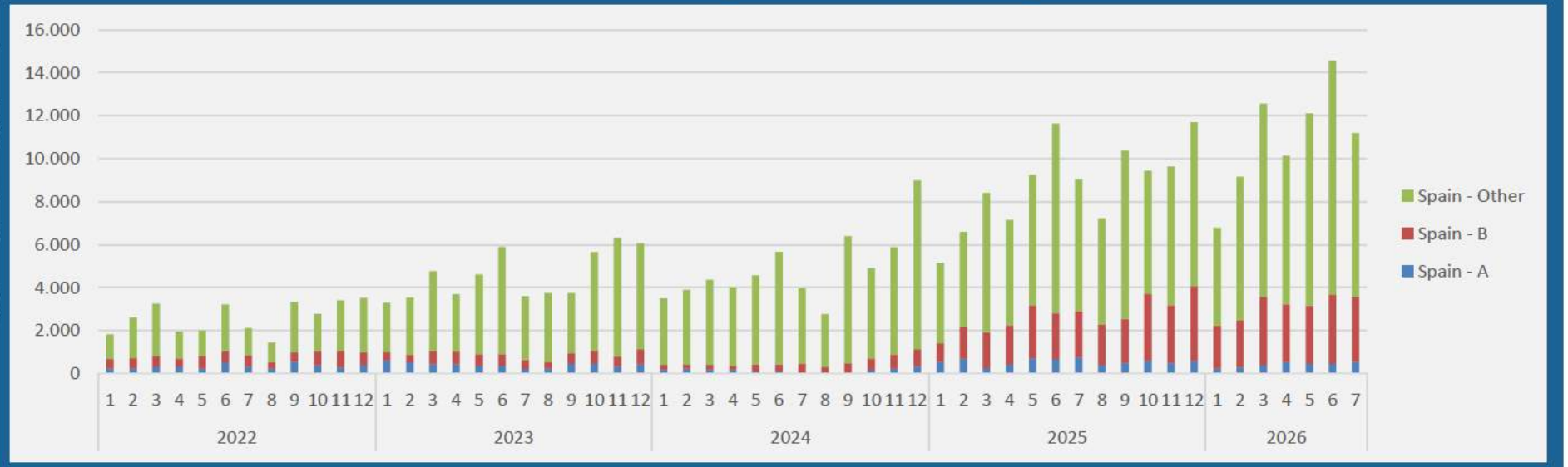
By December 2025, the government reported more than **170,000 electrified vehicles** supported through MOVES III.

The new Auto+ design also responds to a practical weakness of MOVES: the government explicitly identified **simpler access and faster payment** as objectives and shifted administration from the autonomous regions to central government.

Key lessons

1. **Strong affordability targeting can be built into the vehicle rules without income testing.** The €35,000 threshold gives cheaper cars a higher subsidy.
2. **Price graduation is more nuanced than a single ceiling.** Spain both excludes vehicles above €45,000 and gives additional support below €35,000.
3. **Mandatory dealer co-financing increases the affordability effect without increasing government expenditure.** The ≥€1,000 commercial discount is an interesting complement to the public subsidy.
4. **Industrial policy and affordability are deliberately combined.** European vehicle assembly and battery characteristics can account for another **25 percentage points** of the grant.
5. **For a genuinely social scheme, Auto+ remains weak.** There is no income test, no transport-dependence test and no mature used-EV market.

Total number of EV registrations in Spain per segment



Source: EAFO

United Kingdom | Electric Car Grant

Status

Operational throughout the UK: England, Scotland, Wales and Northern Ireland



- Launched in **July 2025**.
- Current programme closing date: **31 March 2030**, or earlier if available funding is exhausted.
- Original funding: **£650m (~€756,6m)**.
- Budget 2025 added **£1.3bn (~€1.5bn)** and extended funding to 2029/30.
- Government now describes the programme as approximately a **£2bn (~€2.3bn) Electric Car Grant**.

Target group & affordability mechanism

The ECG is **not income-tested**. There is:

- no household-income ceiling;
- no extra support for low-income households;
- no rural/transport-poverty test;
- no scrappage condition;
- no family supplement.

Instead, affordability is targeted almost entirely through a **vehicle-price restriction** and an automatic point-of-sale discount.

The normal vehicle eligibility threshold is:

≤£37,000 (~€43,066) RRP including VAT.

The portal additionally imposes a maximum actual customer purchase price of **£42,000 (~€48,886)**, and certain variants belonging to an eligible model/interpolation family can remain within the scheme up to that limit.

The government therefore concentrates support on **mainstream rather than premium EVs**, but does not assess whether the purchaser personally needs financial assistance.

Vehicle scope

- **New cars only**, at first registration.
- **Zero-emission vehicles only**; PHEVs do not qualify.
- Purchase **or leasing** can qualify.
- Vehicle must:
  - emit 0 g CO_2/km at the tailpipe;
  - have at least **100 miles / 160 km range**;
  - carry at least a **3-year/60,000-mile vehicle warranty**;
  - battery warranty of at least **8 years/100,000 miles**;
  - meet production-sustainability requirements.

There is **no used-EV route**, which limits its direct relevance for lower-income households.

The grant is automatically deducted by the dealer/manufacturer. The customer does not apply separately. This also applies to qualifying lease transactions.

Financial support / public cost

Two subsidy bands:

Vehicle sustainability band	Maximum grant
Band 1	**£3,750 (~€4,365)**
Band 2	**£1,500 (~€1,746)**

The band is based on the sustainability/carbon characteristics of vehicle production rather than buyer circumstances.

Current eligible Band 1 vehicles include mainstream models such as the **Abarth 500e, Ford Puma Gen-E, Hyundai Kona Electric, Kia EV2/EV4, Nissan Leaf/Micra and Renault 4/5**, among others.

Public programme envelope:

approximately £2bn (~€2.3bn) through 2029/30.

Unlike Spain, the UK does not require a separate dealer contribution alongside the government grant.

Outcomes & lessons

The current programme already has substantial scale.

As of **14 August 2026**, the government reported that the Electric Car Grant had helped **>160,000 drivers** purchase an EV since its launch in July 2025.

The predecessor Plug-in Car Grant also provides useful evidence. An independent OZEV evaluation estimated approximately: **90,000 additional electric-car sales** were directly attributable to the purchase-price reduction provided by the earlier grant through November 2021.

However, the same evaluation highlighted the main distributional weakness of broad subsidies: grants **may have favoured relatively affluent early adopters**, because households able to buy early EVs tended to have higher incomes. It noted that introducing vehicle-price ceilings helped shift support away from premium cars.

Key lessons

1. **A price ceiling is an administratively simple anti-windfall mechanism.** The £37,000 (~€43,066) threshold focuses the scheme on mainstream cars without requiring household means testing.
2. **Automatic point-of-sale support removes reimbursement delays.** The consumer simply sees a lower purchase or lease price.
3. **The scheme demonstrates that relatively modest grants can operate at very large scale.** More than 160,000 drivers were supported within roughly 13 months.
4. **Price targeting is not equivalent to social targeting.** An affluent household receives the same £3,750 (~€4,365) as a low-income household buying the same vehicle.
5. **Historical evidence confirms this risk.** The earlier UK grant helped increase EV demand but disproportionately benefited more affluent early adopters.

Ireland | ICE2EV Scrappage Pilot + SEAI EV Purchase Grant

Status

Historical / completed pilot



- ICE2EV opened on **1 July 2026** and is now closed after reaching its target of **2,000 applications**.
- Dedicated ICE2EV budget: **€10 million**, financed through Ireland's Climate Action Fund.
- Administered by the **Sustainable Energy Authority of Ireland (SEAI)**.
- The underlying **€3,500 SEAI EV Purchase Grant remains operational** for qualifying private buyers.
- The Department of Transport and SEAI will review the pilot's **uptake, emissions impact and value for money** before future policy decisions are taken.
- **Note:** ICE2EV was not a replacement for Ireland's general EV subsidy; it was a temporary €5,000 targeted layer added on top of it.

Target group & mechanism

ICE2EV did **not apply a household-income test**. Its targeting was instead based on **existing vehicle ownership + scrappage + geography**. The scheme targets replacement of older high-emitting cars and rural car dependence, rather than lower household income directly.

To qualify, the applicant had to replace an eligible older car:

- private **M1 passenger car**;
- petrol or diesel vehicle; the SEAI rules also allow conventional hybrids but exclude BEVs and PHEVs from scrappage;
- **registered in 2013 or earlier**;
- owned by the applicant for at least **12 months** before application;
- taxed and insured at the time of application;
- NCT valid or expired by no more than six months;
- permanently scrapped through the selling dealer at an authorised treatment facility.

A notable geographic element was built into the budget: **65% rural / 35% urban,** based on the CSO Census 2022 classification and the applicant's Eircode. Once either allocation was exhausted, that category closed. Applications were handled **first-come, first-served**.

Socially, the targeting is much looser than, for instance, Italy, Sweden or Latvia:

- no income ceiling;
- no family-income graduation;
- no requirement to be a first-time EV household;
- applicants could **already own an EV**;
- a household could already have **more than one car**.

Vehicle scope

The replacement vehicle had to be:

- **new**
- M1 passenger car
- **battery-electric only**
- registered for private use;
- retained as privately registered for at least **6 months**.

Not eligible as the replacement vehicle:

- used BEVs;
- PHEVs;
- conventional hybrids.

There is no separate large-family or six-/seven-seat adjustment in the published scheme.

Vehicle-price ceiling

The underlying SEAI grant currently applies to qualifying private M1 BEVs priced: **€15,000–€50,000** based on the full customer price before the grant.

There was a transition around the ICE2EV launch:

- ICE2EV/SEAI applications approved before **31 July 2026 at 18:00** could still qualify for vehicles up to **€60,000**;
- from **1 August 2026**, the maximum became **€50,000**.

The government explicitly stated that the reduction to €50,000 was intended to focus public support on **lower-priced EVs** and improve value for money.

Financial support / public cost

The two schemes stacked directly:

Component	Support
General SEAI private BEV grant	**€3,500**
ICE2EV scrappage top-up	**€5,000**
Maximum combined direct support	**€8,500**

The dedicated ICE2EV envelope was: **€10m / €5,000 = 2,000 scrappage grants,** which corresponds exactly to the pilot target.

But the **€10 million should not be observed as the complete public expenditure associated with the 2,000 replacement EVs**. It financed the €5,000 ICE2EV component; the underlying €3,500 SEAI grant came from the existing EV grant programme.

Delivery mechanism

The household did not receive a reimbursement later:

1. Dealer submits the application.
2. Dealer verifies ICE2EV eligibility.
3. **€8,500 is deducted from the vehicle invoice.**
4. Dealer handles scrappage and submits the destruction evidence.
5. SEAI reimburses the dealer.

This makes Ireland a useful **point-of-sale delivery** example.

Outcomes & observations

Pilot demand

2,000-application allocation filled on launch day; contemporary reporting indicates within approximately one hour.

Evidence is still preliminary

There is no completed impact evaluation yet. SEAI explicitly says that the forthcoming review will assess:

- uptake;
- emissions impact;
- value for money.

Key lessons

1. **Ireland layers targeted scrappage support onto an existing general EV grant.** The €5,000 ICE2EV payment did not replace the €3,500 national EV grant; eligible households received both.
2. **The replacement condition creates a clear link to retirement of an older ICE vehicle.** A 2013-or-older vehicle must leave the fleet permanently, making the environmental additionality mechanism more explicit than in an unrestricted purchase grant.
3. **Rural ring-fencing adds a proxy for transport dependence.** Allocating **65% of the budget to rural applicants** recognises greater private-car dependence without an individual commuting-distance test.
4. **But it is not a lower-income programme.** There is no means test, and existing EV owners and multi-car households could qualify. The policy rationale refers to households facing financial barriers, but eligibility itself does not verify income.
5. **New-BEV-only eligibility narrows the accessible vehicle market.** Unlike Sweden, Latvia, Lithuania, Scotland or Oregon, the scheme did not provide a route into the established used-BEV market.
6. **Point-of-sale delivery removes the need to pre-finance the €8,500 support.** The grant and scrappage contribution are deducted directly by the dealer.
7. **Very rapid subscription demonstrates strong demand, but not yet effectiveness.** The post-programme review is still required to establish the socioeconomic profile of beneficiaries, completed replacements, emissions effects and value for money.

2 Income-targeted policies outside Europe

Income-targeting policies outside Europe

South Korea
EV Purchase Subsidy with Social Top-ups

California (US)
Clean Cars 4 All + Driving Clean Assistance Program

Oregon (US)
Charge Ahead Rebate



South Korea | EV Purchase Subsidy with Social Top-ups



Status

Operational nationwide in 2026

- The 2026 Electric Vehicle Deployment Subsidy Guidelines were finalised on **13 January 2026** and are administered through the national **Zero-Emission Vehicle Integrated Portal (무공해차 통합누리집 / ev.or.kr)** and local governments.
- The scheme is a **general EV purchase subsidy**, supplemented by targeted additional support for specific social groups.
- National support is complemented by **local-government subsidies**, which vary by municipality and available budget.
- Subsidies are normally handled by the **vehicle manufacturer/importer on behalf of the purchaser**. After the vehicle is delivered and registered, the local authority pays the subsidy to the manufacturer/importer, so the consumer effectively pays the vehicle price net of subsidy.

Target group & mechanism

The underlying vehicle subsidy is broadly available, but several groups receive **additional national support**.

A. Lower-income / vulnerable households

Individuals classified as **"차상위 이하 계층"**, broadly meaning households at or below Korea's statutory near-poor / lower-income welfare category, receive:

+20% of the applicable national EV subsidy.

This is not expressed in the EV guidelines as one simple nationwide euro-style income ceiling. Eligibility is based on recognised Korean social-welfare status/certification.

B. Young first-time car buyers

- Defined under Korea's Framework Act on Youth as **19-34 years old**.
- If purchasing an EV as their **first-ever car**, they receive: **+20% of the applicable national subsidy.**
- Since 2025, this support **no longer requires the young purchaser also to qualify as low income**.

C. Families with multiple children

For households with **at least two children aged 18 or younger**:

Children ≤18	Additional national subsidy
2 children	KRW 1.0m (~€634)
3 children	KRW 2.0m (~€1,269)
4+ children	KRW 3.0m (~€1,903)

D. ICE-to-EV conversion

New in 2026:

- Owner replaces an ICE vehicle first registered **more than 3 years earlier** by purchasing a new EV.
- The old ICE vehicle may be scrapped or sold.
- Hybrids are excluded from the eligible replacement vehicles.
- Maximum additional support: **KRW 1.0m (~€634)**.
- If the new EV receives ≥KRW 5m (~€3,172) in purchase subsidy, the full KRW 1m conversion payment applies; below KRW 5m, the conversion payment falls proportionally.
- Transfers/sales within the family are excluded to prevent artificial eligibility.

Key distinction: unlike France or Sweden, there is **no general income ceiling for the programme as a whole**. Social targeting is achieved through **additional payments layered onto a broad national subsidy**.

Vehicle scope

The national purchase subsidy applies to **eligible new EVs** listed on the official national portal. The scheme does **not provide a purchase subsidy for second-hand EVs**.

For passenger EVs, the amount is strongly differentiated according to:

- energy efficiency;
- driving range;
- low-temperature range;
- charging performance;
- battery performance / energy density;
- battery safety;
- manufacturer after-sales service;
- vehicle price;
- selected innovative functions such as V2L and Plug & Charge.

Vehicle-price ceiling, 2026

Vehicle base price	Share of calculated national subsidy
< KRW 53m (~€33,620)	100%
KRW 53m to < KRW 85m	50%
≥ KRW 85m (~€53,919)	0%

From **2027**, the government has announced tighter thresholds of **KRW 50m / KRW 80m (~€31,717 / ~€50,747)**.

This price-graduation mechanism is highly relevant for the policy discussion because it prevents full subsidy support for premium vehicles without completely excluding the middle-price segment.

Examples of actual 2026 national subsidies

The national grant is **model-specific**, rather than a single flat amount. The official 2026 vehicle list includes, for example:

- Hyundai IONIQ 5 Long Range 19": **KRW 5.64-5.67m (~€3,578-3,597)**
- Hyundai Kona Electric Long Range 17": **KRW 5.14m (~€3,260)**
- Hyundai Kona Electric Standard 17": **KRW 4.37m (~€2,772)**
- Genesis Electrified G80: **KRW 2.70m (~€1,713)**
- Genesis Electrified GV70 AWD 19": **KRW 2.61m (~€1,656)**.

The Ministry describes the **maximum 2026 national subsidy for a typical medium passenger EV as KRW 5.8m (~€3,679)** before the new conversion support.

South Korea | EV Purchase Subsidy with Social Top-ups

Financial support / public cost

The financial structure is best understood as:

model-specific base subsidy + social/family top-ups + possible conversion support + local-government subsidy.

Lower-income household

Maximum 20% social uplift on a KRW 5.8m (~€3,680) national grant would be:

KRW 5.8m × 20% = KRW 1.16m (~€736) additional support

giving up to approximately:

KRW 6.96m (~€4,416) national support, before any separately eligible family or conversion support.

Official government example

The Ministry provides a particularly useful example for a household that is both lower-income and has three children:

- Base national subsidy: **KRW 5.0m (~€3,173)**
- Lower-income supplement, +20%: **KRW 1.0m (~€635)**
- Three-child supplement: **KRW 2.0m (~€1,269)**

Total national support = KRW 8.0m (~€5,076)

This confirms that the **lower-income and multi-child supplements can be combined**.

Maximum family supplement

A family with four or more eligible children can receive:
+ KRW 3.0m (~€1,904)
on top of the applicable vehicle subsidy.

Conversion support

Replacing an eligible older ICE vehicle can add up to:
+ KRW 1.0m (~€635)
in 2026.

Local support

National support is supplemented by local-government subsidies, and amounts vary substantially according to municipality and annual budget availability. The national portal therefore provides a location-specific subsidy calculator and payment-status database rather than one national combined rate.

Outcomes & lessons from previous cycles

South Korea's EV subsidy has evolved over several years, but published government statistics generally report **overall EV deployment**, not the take-up of individual lower-income top-ups. This is an important limitation when assessing the social effectiveness of the programme.

EV deployment recovered strongly in 2025

The Ministry reports that:

- the Korean EV market experienced a period of demand stagnation in **2023-2024**;
- in **2025**, EV deployment reached approximately **220,000 vehicles**, the **highest annual total recorded in Korea**;
- the Ministry attributes the rebound to both broader vehicle availability and active government policy and financial support.

This was an important reason why government decided **not to reduce the representative passenger-EV subsidy rate again in 2026**, after several years of declining per-vehicle subsidies.

Current 2026 uptake remains substantial

The national zero-emission vehicle portal reports, as of **30 August 2026**:

- **129,210 subsidy-supported vehicles in 2026 year-to-date**;
- cumulative subsidy-supported vehicles since 2019: **816,093**.

These figures cover the subsidy programme broadly and **are not disaggregated by lower-income, youth or multi-child recipients**.

Evolution of the social targeting

2024

The government strengthened lower-income targeting:

- lower-income supplement increased from **10% to 20% of the national subsidy**;
- lower-income young first-time buyers received **30% additional support** in total.

2025

The programme was broadened beyond welfare-status targeting:

- the **20% young first-time buyer supplement was extended regardless of low-income status**;
- fixed family support was maintained: KRW 1m for 2 children; KRW 2m for 3; KRW 3m for 4+.

2026

The social top-ups continue, while the government adds a new **ICE-to-EV conversion grant of up to KRW 1m** and retains the 2025 passenger subsidy level.

This evolution shows a clear move from a predominantly **vehicle-performance subsidy** toward a more layered structure incorporating:

income + age/first purchase + family size + vehicle price + replacement of an ICE vehicle.

Key lessons

1. Social differentiation can be added to an existing general subsidy without creating a separate programme.
South Korea's **+20% lower-income multiplier** is administratively straightforward and preserves the existing subsidy infrastructure.

2. The programme differentiates both the household and the vehicle.
The combination of **social top-ups** and the **KRW 53m (~€33,630) / 85m (~€53,934) vehicle-price bands** reduces the risk of providing full public support for expensive cars.

3. Family composition can be dealt with explicitly.
The **KRW 1m / 2m / 3m (~€635/1,269/1,904) child supplements** are a simple alternative to Germany's income-ceiling adjustment for families.

4. The 2026 conversion payment introduces an additionality mechanism.
Up to **KRW 1m for replacing a >3-year-old ICE vehicle** increases the likelihood that the supported EV actually displaces a combustion vehicle. This is conceptually relevant to a scrappage/replacement approach.

5. South Korea is less precisely socially targeted than Sweden or France.
The underlying subsidy remains available to the wider market. The social component increases the benefit for selected groups rather than reserving public expenditure primarily for those groups.

6. No used-EV support
The scheme is focused on **new vehicles**

7. Published evidence on social outcomes is limited.
The government publishes very detailed vehicle-level subsidy amounts and overall deployment statistics, but I did **not identify an official 2026 dataset showing how many beneficiaries were lower-income, young first-time buyers or multi-child households**. Therefore, the programme can be assessed confidently on **design**, but less confidently on whether the social supplements reach the intended groups at scale.

California (US) | Clean Cars 4 All + Driving Clean Assistance Program

Status

Operational

Clean Cars 4 All (CC4A) has operated in California since **2015** and is administered regionally through five participating air districts.

California subsequently created the **Driving Clean Assistance Program (DCAP)** to:

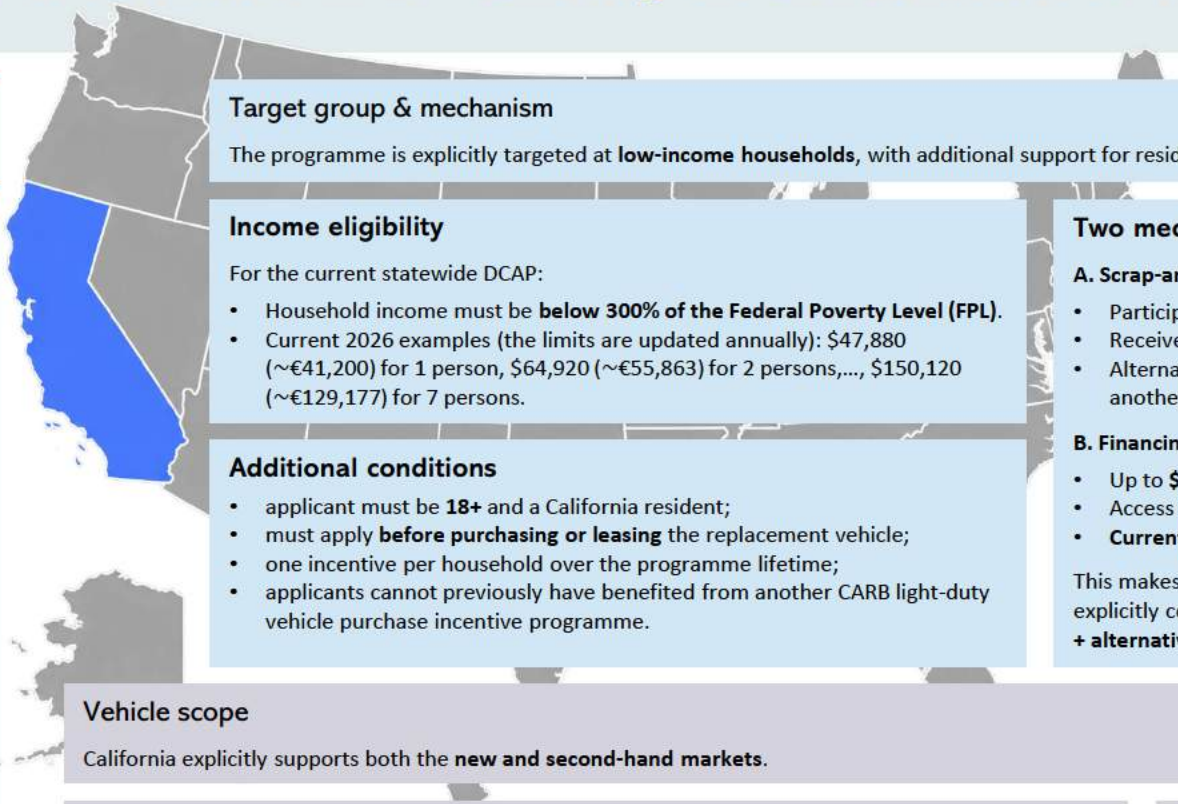
- extend CC4A access to Californians living outside the five participating air districts; and
- provide a statewide financing-assistance pathway.

DCAP began statewide rollout in **late 2024** and is administered by the **Community Housing Development Corporation (CHDC)** on behalf of the California Air Resources Board (CARB).

Current status, 21 August 2026:

- CC4A Scrap-and-Replace pathway: **OPEN**
- DCAP Financing Assistance without scrappage: **CLOSED** to new applications due to "extraordinary response and high demand."

Why the two programmes should be viewed together: Californians in the five participating air districts use their local CC4A scheme for scrap-and-replace; income-qualified residents elsewhere can access CC4A through statewide DCAP.



Target group & mechanism

The programme is explicitly targeted at **low-income households**, with additional support for residents of **Disadvantaged Communities (DACs)**.

Income eligibility

For the current statewide DCAP:

- Household income must be **below 300% of the Federal Poverty Level (FPL)**.
- Current 2026 examples (the limits are updated annually): $47,880 (~€41,200) for 1 person, $64,920 (~€55,863) for 2 persons,..., $150,120 (~€129,177) for 7 persons.

Additional conditions

- applicant must be **18+** and a California resident;
- must apply **before purchasing or leasing** the replacement vehicle;
- one incentive per household over the programme lifetime;
- applicants cannot previously have benefited from another CARB light-duty vehicle purchase incentive programme.

Two mechanisms

A. Scrap-and-Replace, Clean Cars 4 All

- Participant retires an older, higher-polluting gasoline/diesel vehicle.
- Receives an upfront grant towards a new or used cleaner vehicle.
- Alternatively, household can choose a **$7,500 (~€6,454) mobility option** rather than another car.

B. Financing Assistance, no scrappage required

- Up to **$7,500 (~€6,454) vehicle grant + $2,000 (~€1,721) charging support**.
- Access to financial education/counselling and loans through participating credit unions.
- **Currently closed to new applications as of 21 August 2026.**

This makes California significantly broader than a conventional EV purchase subsidy. It explicitly combines **income targeting + scrappage + purchase support + financing + charging + alternative mobility**.

Vehicle scope

California explicitly supports both the **new and second-hand markets**.

Eligible replacement vehicles

Under current statewide DCAP/CC4A rules:

- **New OR used**
- Purchase **OR lease**
- Eligible technologies: **BEV, FCEV, PHEV**
- Maximum vehicle purchase price: **$45,000 (~€38,722)**, excluding taxes and fees.
- Used vehicle: maximum **8 calendar years old;** maximum **75,000 original miles**.
- Vehicles must be acquired through an authorised California dealer.

Regional CC4A rules specify that replacement vehicles must similarly be **8 years old or newer**, and can be new or used PHEVs, BEVs or FCEVs.

Important policy change

Conventional hybrids were historically eligible, but following **California Senate Bill 1382 they ceased to qualify as advanced-technology replacement vehicles from 1 January 2025**.

Other mobility choices

Instead of another car, a CC4A participant can choose:

- an **e-bike**;
- public-transport vouchers;
- combinations of eligible alternative-mobility options.

This is a particularly distinctive aspect of the California model.

California (US) | Clean Cars 4 All + Driving Clean Assistance Program

Financial support / public cost

Clean Cars 4 All, scrap-and-replace

Current regional CC4A baseline incentives

Household / location	PHEV	BEV / FCEV	Mobility option
≤300% FPL	$9,500 (~€8,175)	$10,000 (~€8,605)	$7,500 (~€6,454)
≤300% FPL + Disadvantaged Community	$11,500 (~€9,896)	$12,000 (~€10,326)	$7,500 (~€6,454)

In addition:

- BEV/PHEV purchasers can receive **up to $2,000 (~€1,721)** towards:
  - home charging equipment/installation; or
  - a prepaid public-charging card.
- Therefore, a low-income DAC resident replacing an old car with a BEV can receive up to: **$12,000 vehicle incentive + $2,000 charging = $14,000 (~€12,047).**
- Vehicle purchasers can also be eligible for up to **$5,000 (~€4,302) for adaptive equipment** where required.
- Zero-emission motorcycles receive **$4,500 (~€3,872)**, or **$6,500 (~€5,593) in a DAC**.

Statewide DCAP scrap-and-replace pathway

The currently open DCAP pathway provides:

- **up to $10,000 (~€8,605)** towards a new or used BEV/PHEV/FCEV;
- **up to $12,000 (~€10,326)** for participants in designated disadvantaged communities;
- **$2,000 (~€1,721) charging incentive**;
- or **$7,500 (~€6,454) mobility option** instead of a replacement vehicle.

Financing

Eligible CC4A/DCAP participants can access credit-union financing:

- up to **$45,000 (~€38,722)**
- interest rate **below 8% APR**
- financial education and individual financial counselling are required.

This is **not a 0% loan**, unlike the former Scottish model. It is intended as access to "fair financing" for households that may have challenged or no credit.

Programme expenditure

The scale is substantial. For CC4A, CARB reported as of **1 June 2025**:

- **$555 million (~€477,573,410) allocated**
- **$241 million (~€207,378,724) implemented**
- **$88.8 million (~€76,411,746) benefiting priority populations**
- **26,900 vehicles implemented**.

The ratio of implemented funding to implemented vehicles is approximately: **$241m / 26,900 ≈ $8,960 (~€7,710) per implemented vehicle.**

This should be interpreted only as an **indicative historical programme expenditure per implemented vehicle**, not as the current individual grant amount.

For the broader financing-assistance programmes incorporated into DCAP, CARB reported as of **1 November 2025**:

- **$160 million (~€137,678,821) allocated**
- approximately **$57 million (~€49,048,080) implemented**
- **5,900 vehicles implemented**.

In addition, **$125 million (~€107,561,579) for statewide CC4A** is administered through DCAP but is excluded from that $160 million financing-assistance figure.

Outcomes & lessons from previous implementation

Large-scale deployment

By 31 December 2025, the five regional programmes had recorded **31,191 vehicle replacements** including:

- 9,132 BEVs
- 13,143 PHEVs
- 7,955 conventional hybrids
- 175 FCEVs
- 591 conventional replacement vehicles
- plus 193 mobility-option participants.

The hybrid/conventional figures reflect earlier programme rules. Conventional hybrids are no longer eligible from 2025.

Strong concentration on lower incomes

Although historical CC4A eligibility extended further up the income distribution, CARB reports that: **at least 98% of programme funding from 2015 through Q2 2025 went to participants at or below the 300% and 225% FPL income categories.**

This is important evidence that the tiered structure has in practice concentrated expenditure strongly on lower-income households.

Strong demand, including funding pressure

CARB reports that CC4A has experienced high application volumes since reopening in late 2021. The programme's current funding analysis explicitly states that **consistent and predictable funding is essential**, because budget gaps can interrupt access for lower-income households.

This problem became visible again in 2026:

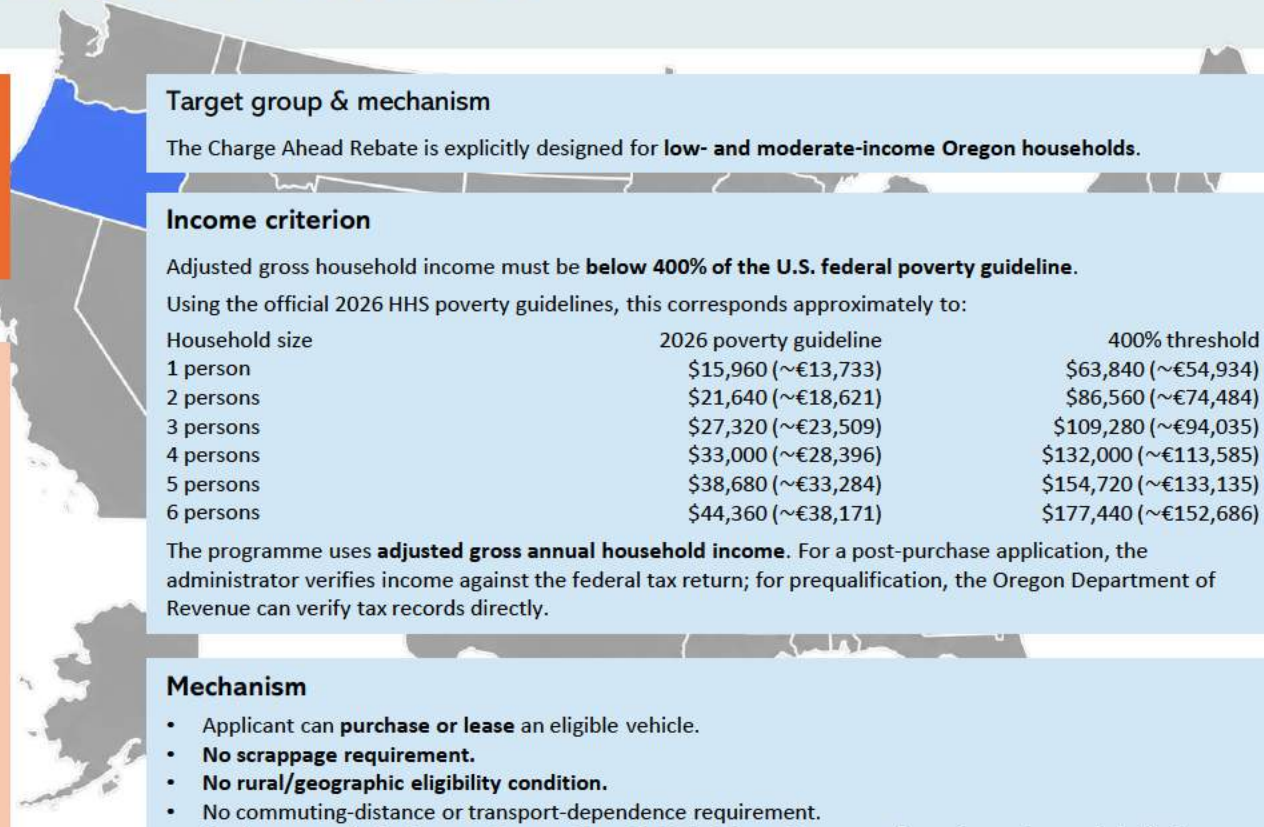
- on **21 August 2026**, DCAP closed the Financing Assistance pathway to new applicants because of **extraordinary response and high demand**;
- CC4A scrap-and-replace remains open.

This is a useful practical lesson: a successful social EV scheme needs both an eligibility model and a **budget/rationing strategy** for demand that exceeds available funding.

Key lessons

1. **California provides the most comprehensive integrated policy model.**
   Instead of treating the car subsidy, finance and charging as separate policies, California combines **scrappage + grant + financing + charging + mobility alternatives** in one household pathway.
2. **Used EVs are central rather than secondary.**
   New and used vehicles receive access to the same programme, subject to age, mileage and **$45,000 (~€38,722) price limits**. This is highly relevant where the objective is genuine affordability.
3. **Scrappage improves both targeting and environmental additionality.**
   A household must retire an existing older vehicle to obtain the highest incentives. This helps target households that already depend on a car and avoids simply subsidising an additional household vehicle.
4. **Geographic disadvantage can supplement income targeting.**
   Residents of designated disadvantaged communities receive up to **$2,000 (~€1,721) more vehicle support**, taking the BEV/FCEV grant from $10,000 (~€8,605) to $12,000 (~€10,326).
5. **Charging is treated as part of the affordability package.**
   The additional **$2,000 charging allowance** acknowledges that access to an affordable EV does not automatically mean access to affordable charging.
6. **A non-car mobility alternative is valuable.**
   The **$7,500 (~€6,454) mobility option** avoids spending public money on continued car ownership where public transport or an e-bike better meets the household's needs.
7. **Finance can remain a barrier even after a large grant.**
   California's loans are capped below **8% APR**, not at 0%. For the lower income target population, California's grant architecture combined with Scotland's 0% financing concept could potentially provide stronger affordability than either model alone.
8. **Programme complexity must be managed carefully.**
   California created DCAP partly because stakeholders reported that the previous collection of incentive pathways and eligibility requirements was **difficult to navigate**. Centralised administration, financial coaching and dealer-paid grants are therefore important elements of the current design.

Oregon (US) | Charge Ahead Rebate



Status

Operational. The 2026 application/purchase window opened on 25 August 2026 and runs until 4 November 2026.

- Only vehicles **purchased or leased during this window** qualify. Purchases before 25 August or after 4 November 2026 are not eligible.
- Oregon DEQ already expects the programme to be **fully subscribed** because of strong demand and limited funding. Rebates will therefore be suspended again on **5 November 2026**.
- If applications exceed available funding during the open period, eligible applicants can be placed on a **waiting list** and paid when DEQ receives its next financial allocation in **spring 2027**.
- The Oregon Clean Vehicle Rebate Program has **no statutory sunset date**.
- The programme was created through legislation in **2017**, rules were adopted in **May 2018**, and the first rebates were issued in **December 2018**.
- New programme rules were adopted on **14 May 2026** and became effective on **18 May 2026**, specifically to improve financial sustainability, adjust rebate levels and limit repeat use.

Target group & mechanism

The Charge Ahead Rebate is explicitly designed for **low- and moderate-income Oregon households**.

Income criterion

Adjusted gross household income must be **below 400% of the U.S. federal poverty guideline**.

Using the official 2026 HHS poverty guidelines, this corresponds approximately to:

Household size	2026 poverty guideline	400% threshold
1 person	$15,960 (~€13,733)	$63,840 (~€54,934)
2 persons	$21,640 (~€18,621)	$86,560 (~€74,484)
3 persons	$27,320 (~€23,509)	$109,280 (~€94,035)
4 persons	$33,000 (~€28,396)	$132,000 (~€113,585)
5 persons	$38,680 (~€33,284)	$154,720 (~€133,135)
6 persons	$44,360 (~€38,171)	$177,440 (~€152,686)

The programme uses **adjusted gross annual household income**. For a post-purchase application, the administrator verifies income against the federal tax return; for prequalification, the Oregon Department of Revenue can verify tax records directly.

Mechanism

- Applicant can **purchase or lease** an eligible vehicle.
- **No scrappage requirement.**
- **No rural/geographic eligibility condition.**
- No commuting-distance or transport-dependence requirement.
- Applicants are limited to **two Oregon Clean Vehicle Rebate Program rebates in total** over their lifetime.
- The vehicle must primarily be used by household members.
- The same applicant/household cannot simply rebate a car already owned or leased by a household member.

Prequalification and point-of-sale support

- An applicant can obtain a **Charge Ahead Prequalification Voucher before choosing a vehicle**.
- At a participating dealership, the rebate can then be **deducted immediately from the purchase or lease price**, rather than requiring the household to finance the full price and wait for reimbursement.
- Income can also be demonstrated through qualifying programmes such as **SNAP or the Oregon Health Plan** in the prequalification process.

Vehicle scope

Oregon is particularly relevant because the programme explicitly includes the **used EV market**.

Eligible

- New BEV
- Used BEV
- New PHEV
- Used PHEV
- purchase or lease.

Vehicle-price condition

- Original **base MSRP must be below $50,000 (~€43,025)**.
- The ceiling therefore excludes the premium end of the EV market.
- For used vehicles, eligibility is based on the vehicle's **original base MSRP**, not simply its current second-hand transaction price.

Technical conditions

- BEV must be capable of at least **75 miles / ~121 km of electric-only range**.
- PHEV must have at least **10 miles / ~16 km electric-only range**.
- PHEVs must remain within the applicable **15-year / 150,000-mile battery warranty** during the required ownership period.
- Vehicle must be operational, able to travel at least **55 mph**, and cannot have a salvage title or have been declared a total loss.
- Vehicle must be acquired from a **certified dealer or qualifying OEM. Private person-to-person sales are excluded.**
- Vehicle must remain registered in Oregon for at least **24 months**.

The official eligible-vehicle list includes both recent new EVs and considerably older used models, allowing lower-income households to access substantially cheaper vehicles than in a new-only scheme.

Oregon (US) | Charge Ahead Rebate



Financial support / public cost

The 2026 rules differentiate strongly between **new and used**, and between **BEVs and PHEVs**. This creates an interesting affordability structure. A **$4,000 (~€3,442) rebate on a $12,000 (~€10,326) used BEV covers one-third of the vehicle price**, while support for cheaper cars is calibrated to avoid the subsidy exceeding the transaction value:

Vehicle	Charge Ahead Rebate
New BEV	**$7,500 (~€6,454)**
New PHEV	**$5,000 (~€4,302)**
Used BEV, price ≥$12,000 (~€10,326)	**$4,000 (~€3,442)**
Used BEV, $8,333-$11,999 (~€7,171-10,325)	**30% of purchase price**
Used BEV, price <$8,333 (~€7,171)	**$2,500 (~€2,151)**, capped at vehicle price
Used PHEV	**$2,500 (~€2,151)**, capped at vehicle price

No stacking in 2026

- A household can receive either the **Standard Rebate OR Charge Ahead**, not both.
- For comparison, Oregon's non-income-tested Standard Rebate currently provides:
  - **$2,000 (~€1,721)** for a new BEV;
  - **$1,500 (~€1,291)** for a new PHEV.
- The substantially higher Charge Ahead amount therefore explicitly advantages lower- and moderate-income households.

Public funding

The wider Oregon Clean Vehicle Rebate Program has a permanent revenue mechanism:

- **45% of Oregon's Vehicle Privilege Tax**, or
- **at least $12 million (~€10.3 million) per year**, whichever is higher.
- At least **20% of programme funding must be directed to Charge Ahead** under the legislative framework.
- Oregon also secured approximately **$31 million (~€26.7 million) in federal Climate Pollution Reduction Grant funding** targeted at Charge Ahead, supporting its reopening and expansion from 2025.

Historical expenditure through **30 June 2024** for the whole Oregon Clean Vehicle Rebate Program was:

- rebate payments: **$91.82 million (~€79.01 million)**
- administrative costs: **$7.17 million (~€6.17 million)**
- education/outreach: **$0.52 million (~€0.45 million)**
- total: **$99.16 million (~€85.33 million)**.

Administrative expenditure represented about **7% of the programme budget**, below the statutory 10% administrative-cost cap.

A single fixed **2026 Charge Ahead budget envelope is not specified in DEQ's July 2026 reopening announcement**. Instead, funding is replenished through the standing revenue stream and other allocations, and DEQ explicitly expects available 2026 funds to be exhausted.

Oregon (US) | Charge Ahead Rebate

Outcomes & lessons from previous cycles

Oregon offers useful historical evidence because the programme has operated since 2018.

Significant scale

By **5 August 2024**:

- **31,778 rebates** had been issued across the whole Oregon programme. Of these:
  - **26,385 Standard Rebates**
  - **3,320 income-qualified Standard + Charge Ahead rebates for new vehicles**
  - **2,073 Charge Ahead rebates**.
- By **2 April 2025**, cumulative programme volume had exceeded **33,000 rebates**.

Strong evidence of additionality / affordability effect

The participant survey found that:

- **88% of Charge Ahead recipients** reported that the rebate had a moderate, very high or extremely high level of importance in enabling the EV acquisition;
- **86% of Charge Ahead recipients said the rebated car was their first EV**;
- the vehicle replaced by a Charge Ahead participant was on average **12 years old**, compared with 8 years for Standard Rebate recipients.

These are particularly valuable indicators because they suggest the programme is reaching households making a genuine transition from older vehicles into electric mobility rather than simply subsidising repeat EV purchasers.

Used EVs are actually being used by the target group

Among income-qualified Charge Ahead recipients in the 2024 evaluation:

- **63%** selected new vehicles;
- **37% selected used vehicles**.
- **84%** of Charge Ahead vehicles were BEVs;
- **16%** were PHEVs.

This is strong evidence: allowing used EVs does not merely broaden theoretical eligibility. A sizeable proportion of lower-income participants actually choose them.

Point-of-sale prequalification reduces the liquidity barrier

Between the 2023 pilot and closure of the programme in June 2024:

- **1,804 prequalification vouchers** were approved.
- **725 had been redeemed** by 24 July 2024.
- **59% of all 2024 Charge Ahead rebates** issued by that date used a prequalification voucher.
- Approximately **40% of households receiving a prequalification voucher had converted it into a rebate** by that date.

DEQ explicitly identifies two benefits:

1. household knows its eligibility **before committing to a vehicle**;
2. rebate can be deducted **at the dealership**, reducing the amount that must be financed upfront.

Purchase strongly preferred over leasing

Among Charge Ahead recipients:

- **89% purchased**
- **11% leased**.

This result is strikingly similar to Sweden's early 2026 results, where 89% of beneficiaries also chose purchase.

It strengthens the argument that lower-income EV policy should **not assume social leasing is necessarily the preferred household solution**.

Demand has repeatedly exceeded available funding

This is the main weakness of the programme.

The 2024 legislative review found:

- rebate demand growing by approximately **20% year-on-year**;
- funding exhausted and programme suspended in **2023**;
- programme suspended again in **2024**;
- Standard Rebate suspended again on **9 September 2025**;
- Charge Ahead suspended on **5 December 2025**;
- the 2026 programme is deliberately limited to **25 August-4 November**, with DEQ already expecting full subscription.

This provides one of the clearest lessons from Oregon: **permanent legal eligibility does not guarantee continuous access if annual funding is insufficient.**

Key lessons

1. **Oregon is one of the strongest examples of direct used-EV support.**
   A used BEV can receive up to **$4,000 (~€3,442)**, compared with $7,500 (~€6,454) for a new BEV. The support is therefore differentiated without excluding the lower-cost second-hand market.
2. **Income targeting and a vehicle-price ceiling work well together.**
   The combination of **<400% poverty guideline income + <$50,000 (~€43,027) original MSRP** restricts support both on the household and vehicle sides.
3. **The sliding rebate for cheaper used BEVs is particularly interesting.**
   The **$2,500 / 30% / $4,000** formula avoids a situation where a fixed subsidy becomes disproportionately large relative to a very cheap used vehicle.
4. **Prequalification and point-of-sale payment address the cash-flow barrier.**
   For the low income target population, this is likely more important than reimbursing the household months after the purchase.
5. **There is evidence that the support reaches first-time EV households.**
   The **86% first-EV rate** and average **12-year-old replacement vehicle** are strong indicators of social and environmental additionality.
6. **Ownership appears substantially more popular than leasing.**
   The **89% purchase / 11% lease** split mirrors Sweden and argues for providing households with a choice rather than designing social leasing as the only route.
7. **Stable funding is critical.**
   Repeated programme suspensions show the downside of an entitlement whose demand regularly exceeds the available annual budget. The Netherlands would need either a firm household quota, sufficient contingency funding or a transparent waiting-list mechanism.
8. **Unlike California, Oregon no longer requires scrappage.**
   Oregon originally included scrappage and pollution-area requirements, but these were removed in **2018** to simplify and broaden access. This makes Oregon useful for comparing the trade-off between **simple income-targeted support** and California's more targeted but more complex scrap-and-replace model.

3 Income-targeted shared-car incentives

Shared-car incentives

A. Direct lower-income shared-car targeting

- Brussels Bruxell'Air
- California Clean Mobility Options

B. General shared-car incentives

- Belgian federal Mobility Budget
- French Forfait mobilités durables
- Canadian EV support for carsharing operators









Belgium | Bruxell'Air Mobility Bonus



Status

Operational in 2026

Target group & mechanism

- Available to residents of the Brussels-Capital Region who **deregister an M1 passenger car** that has been registered in their name for at least one year.
- Household cannot add another car/motorcycle/company car for at least **one year** after deregistration.
- The mobility budget is explicitly **income-graduated**:

Household situation / taxable income	Maximum mobility budget
Person with disability, any income	**€1,132**
Single <€45,938 / couple-cohabitant <€64,264	**€1,132**
Single €45,938–€91,754 / couple €64,264–€110,080	**€766**
Above these thresholds	**€566**

- The budget remains valid for **two years**.
- The household chooses how to allocate the budget among public transport, cycling, taxis, mobility cards and **carsharing**. Current carsharing options include **Cambio and Poppy**. For Cambio, at least €200 must be allocated; a one-year START package costs €71 and a two-year package €107, with the remaining amount becoming **trip credit**. The €150 refundable Cambio deposit remains payable by the user.
- This is therefore not simply a discount on carsharing: it is effectively a **car-scrappage/deregistration mobility account**, with the largest account provided to lower-income households.

Lessons

Very high relevance. Bruxell'Air shows how a household can be encouraged to **give up private-car ownership without giving up access to a car**. The strongest elements are the income graduation, requirement to remove a private car, and ability to combine carsharing with public transport and cycling.

The main caveat is that **€1,132 over two years is modest** if carsharing needs are frequent, and deposits or additional charges can still be barriers.

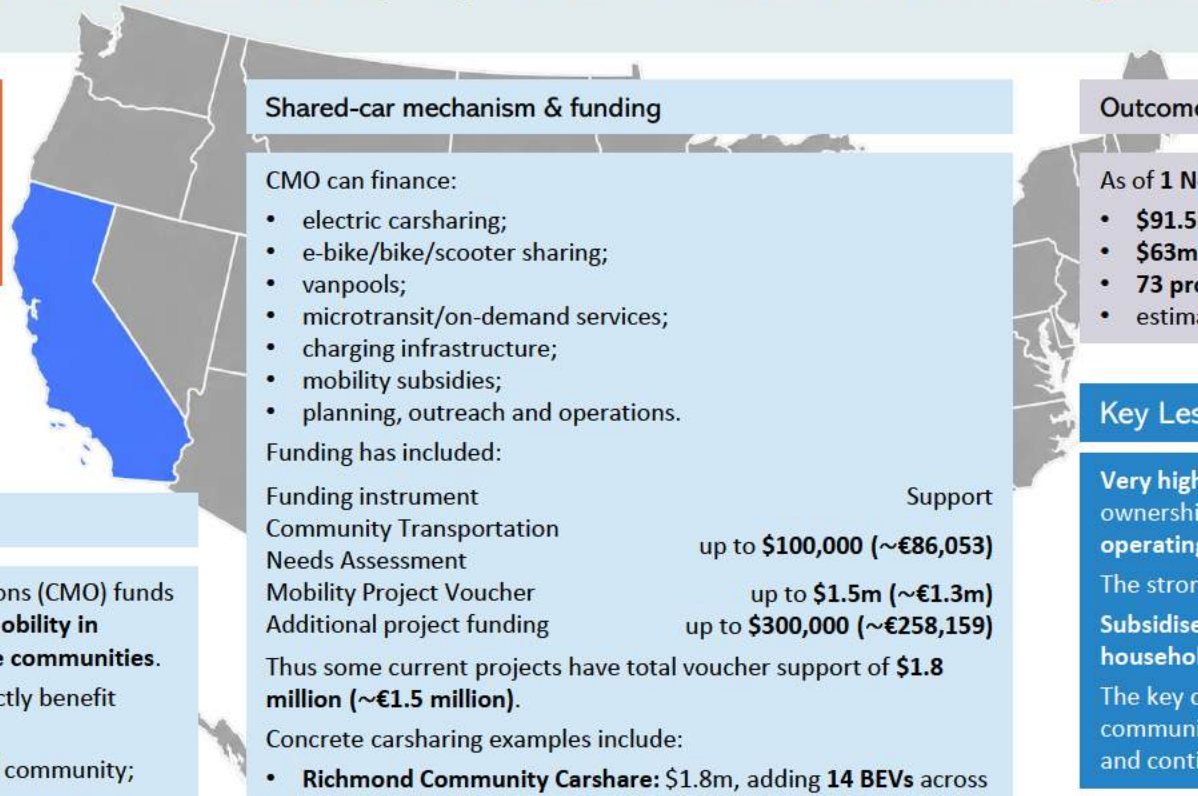
Outcomes

- **1,402 bonuses** were awarded in 2024 and **1,052** in 2025.
- In 2024, **65.2% of beneficiaries were in the low-income category**. Interestingly, this was very similar to their 66.6% share among motorised Brussels households, suggesting that lower-income households are being reached proportionally rather than being disproportionately represented.
- The 2024 evaluation identifies **cycling, STIB and Cambio as the three most frequently selected options**, while Cambio is also among the services receiving the largest shares of total bonus expenditure.

California (US) | Clean Mobility Options Voucher Pilot Program

Status

Existing programme/projects operational, but no new application window is currently scheduled.



Target group

- California's Clean Mobility Options (CMO) funds **community-designed shared mobility in disadvantaged and low-income communities**.
- Every funded project must directly benefit residents of:
  - a designated disadvantaged community;
  - an AB 1550 low-income community/household; or
  - qualifying Tribal land.
- Lead applicants are generally **public agencies, non-profits or Tribal governments**; private mobility operators can participate as project partners.

So the social targeting differs from Bruxell'Air: **CMO primarily targets communities geographically and institutionally**, rather than requiring every carshare user to pass an individual income test.

Shared-car mechanism & funding

CMO can finance:

- electric carsharing;
- e-bike/bike/scooter sharing;
- vanpools;
- microtransit/on-demand services;
- charging infrastructure;
- mobility subsidies;
- planning, outreach and operations.

Funding has included:

Funding instrument	Support
Community Transportation Needs Assessment	up to **$100,000 (~€86,053)**
Mobility Project Voucher	up to **$1.5m (~€1.3m)**
Additional project funding	up to **$300,000 (~€258,159)**

Thus some current projects have total voucher support of **$1.8 million (~€1.5 million)**.

Concrete carsharing examples include:

- **Richmond Community Carshare:** $1.8m, adding **14 BEVs** across up to eight locations, particularly serving disadvantaged communities.
- **Stockton EV Car Share:** $1.8m, affordable round-trip EV carsharing with low-cost hourly/daily rentals specifically designed for **low-income residents**.

An earlier affordable-housing carsharing pilot in Richmond, Oakland and San Jose made residents of affordable housing **automatically eligible because they were already income-qualified**, and benefited more than **18,600 residents** in disadvantaged communities.

Outcomes

As of **1 November 2025**, CMO reported:

- **$91.5m (~€78.7m) allocated/encumbered**
- **$63m (~€54.2m) benefiting priority populations**
- **73 projects implemented**
- estimated **8,900 tCO_2e reductions** from implemented funding.

Key Lessons

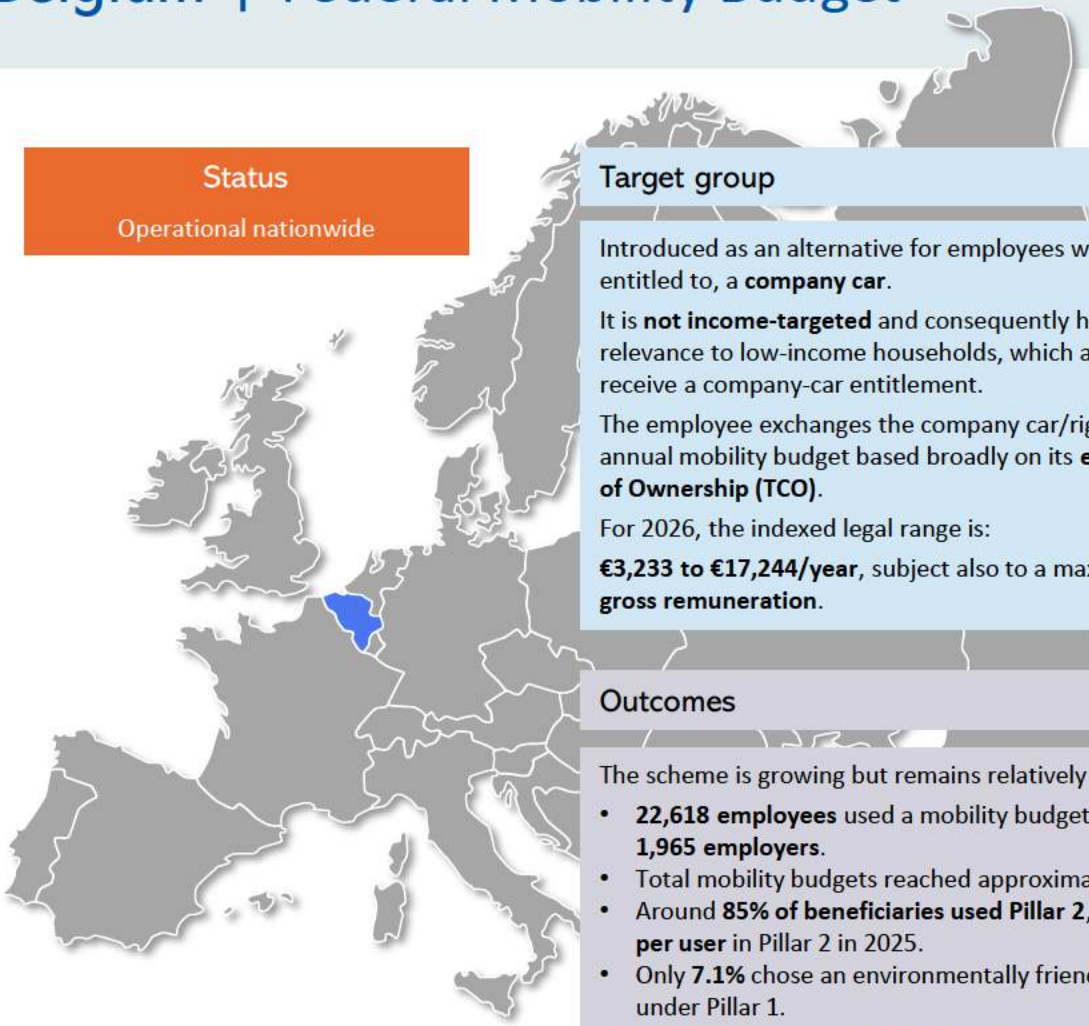
Very high relevance for shared mobility. Instead of subsidising individual car ownership, government finances the **shared fleet, charging infrastructure and operating model**, while concentrating the service in transport-poor communities.

The strongest transferable principle is:

Subsidise availability and affordability of shared cars where vulnerable households live, rather than giving every household a separate vehicle subsidy.

The key challenge is **long-term operating viability after grant funding ends**; community carsharing requires sufficient utilisation, insurance, fleet management and continued affordable pricing.

Belgium | Federal Mobility Budget



Status

Operational nationwide

Target group

Introduced as an alternative for employees who have, or are entitled to, a **company car**.

It is **not income-targeted** and consequently has limited direct relevance to low-income households, which are less likely to receive a company-car entitlement.

The employee exchanges the company car/right to a car for an annual mobility budget based broadly on its **employer Total Cost of Ownership (TCO)**.

For 2026, the indexed legal range is:

€3,233 to €17,244/year, subject also to a maximum of **20% of gross remuneration**.

Outcomes

The scheme is growing but remains relatively small:

- **22,618 employees** used a mobility budget in 2025 across **1,965 employers**.
- Total mobility budgets reached approximately **€224m**.
- Around **85% of beneficiaries used Pillar 2**, averaging **€9,415 per user** in Pillar 2 in 2025.
- Only **7.1%** chose an environmentally friendly company car under Pillar 1.

The official statistics do **not isolate how much Pillar 2 spending goes specifically to carsharing**; housing, public transport, bicycles and other options are included.

Carsharing incentive

Under **Pillar 2**, the employee can spend the budget on sustainable mobility including:

- shared cars;
- shared bicycles/scooters;
- carpooling;
- public transport;
- other sustainable mobility and, under conditions, housing costs.

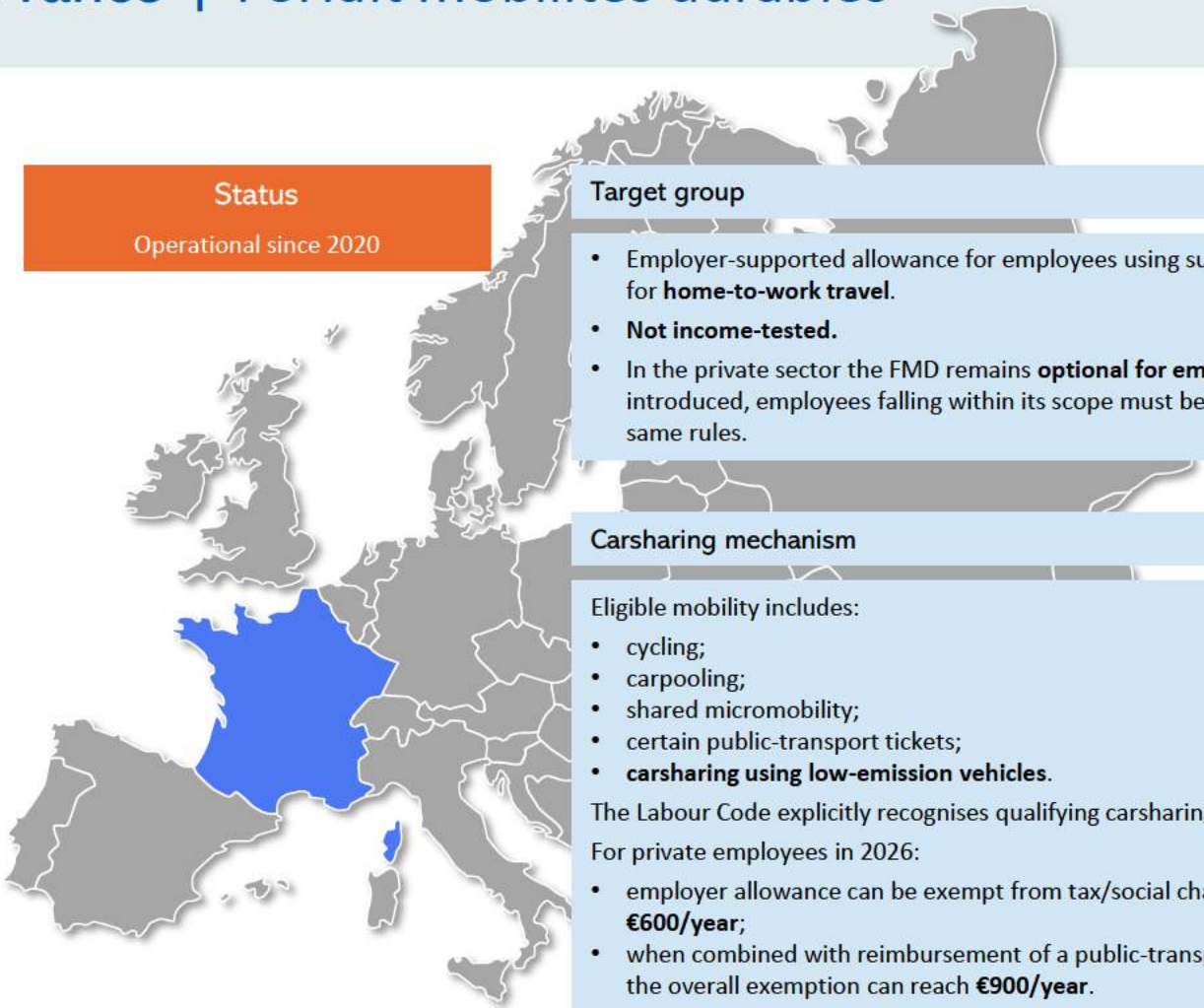
Pillar 2 expenditure is **fully exempt from employee tax and ordinary social-security contributions**. From **1 January 2026**, motorised vehicles used for carsharing under Pillar 2 must be **zero-emission**.

There is **no separate government carsharing grant**: the financial incentive arises from allowing the employer-funded mobility budget to be spent tax-free on shared mobility.

Key Lessons

Useful as a model for integrating carsharing into a **flexible mobility account**, but weak for direct social targeting. The main lesson is the **fiscal neutrality and flexibility**: employees can replace an owned/company car with a portfolio of mobility services rather than one prescribed alternative.

France | Forfait mobilités durables



Status

Operational since 2020

Target group

- Employer-supported allowance for employees using sustainable modes for **home-to-work travel**.
- **Not income-tested.**
- In the private sector the FMD remains **optional for employers**; where introduced, employees falling within its scope must be treated under the same rules.

Carsharing mechanism

Eligible mobility includes:

- cycling;
- carpooling;
- shared micromobility;
- certain public-transport tickets;
- **carsharing using low-emission vehicles**.

The Labour Code explicitly recognises qualifying carsharing services.

For private employees in 2026:

- employer allowance can be exempt from tax/social charges up to **€600/year**;
- when combined with reimbursement of a public-transport subscription, the overall exemption can reach **€900/year**.

For public-sector employees, the FMD is:

- **€100** for 30–59 eligible commuting days;
- **€200** for 60–99 days;
- **€300** for ≥100 days.

Shared-mobility services, including qualifying shared electric/PHEV vehicles, are eligible.

Outcomes

The 2025 government barometer finds:

- only **7% of private-sector employees** report that FMD is deployed in their organisation;
- **25% of public-sector employees** report access;
- where available, **98% of recipients are satisfied**;
- **87%** say it motivates them to continue using sustainable transport.

However, no recent official data separate **carsharing-specific usage** from cycling, carpooling and the other modes.

Key Lessons

Useful as a **low-cost complementary incentive**, especially for occasional carsharing, but the €600 ceiling is too small to replace a substantial amount of private-car mobility on its own. Its main value is that an employer can **reimburse actual sustainable mobility consumption rather than provide a vehicle**.

Canada | EV Affordability Program – Special Support for Carsharing Fleets



Status & mechanism

- Operational in 2026, with eligible transactions from 16 February 2026.
- Programme runs to 31 March 2031, or until funds are exhausted.
- Overall programme funding: CAD 2.275bn (~€1.418bn) over five years; CAD 2.05bn (~€1.28bn) remained as of 1 August 2026.
- It is not income-targeted carsharing support: qualifying carsharing operators must provide an open membership/subscription service rather than one reserved for a particular low-income group.

Special treatment of carsharing operators

- This is a particularly useful comparator because Canada's new **Electric Vehicle Affordability Program (EVAP)** explicitly gives carsharing operators a much larger fleet allowance than ordinary businesses.
- Ordinary organizations/businesses can normally receive only **10 EVAP incentives over the entire five-year programme**.
- An approved carsharing company can instead receive: **up to 50 incentives every calendar year.**
- 2026 incentive:

Vehicle	Incentive per vehicle
BEV / FCEV	**up to CAD 5,000 (~€3,118)**
PHEV	**up to CAD 2,500 (~€1,559)**

- This gives an approved operator a theoretical 2026 federal contribution of up to **50 BEVs × CAD 5,000 = CAD 250,000 (~€155,875) per operator per year.**
- Incentives decline progressively after 2026.

Outcomes

EVAP is new, and **official statistics separating incentives issued to carsharing companies from other EVAP recipients are not available yet**. It is therefore observed primarily as a **design precedent**, not an evaluated social programme.

Its relevance is nevertheless important: government recognises that **one shared vehicle potentially serves many households**, and therefore permits **five times as many supported vehicles per year** for carsharing companies as the lifetime allowance for a normal business.

Vehicle/operator requirements

- **New vehicles only.**
- Normally final transaction value **≤CAD 50,000 (~€31,175)**; Canadian-made EVs have no price ceiling.
- Vehicles must be made in Canada or a country with a Canadian free-trade agreement.
- Carsharing company must:
  - be formally registered in Canada;
  - operate a membership/subscription model;
  - provide **24/7 self-service fleet access**;
  - normally charge by minute/hour or similar;
  - be specifically approved by Transport Canada.

Key Lessons

For a lower-income programme, this could be strengthened considerably by adding conditions such as:

- fleet deployed in transport-poor neighbourhoods;
- reduced membership/hourly rates for income-qualified users;
- service at social housing locations;
- minimum availability/service standards.

4 Projections of EV availability per vehicle segment in the EU

Currently available EV models in the EU | A and B segments

42 models · A and B segment

A segment 7 models

Chery	Chery eQ1 (Ant)
Dacia	Dacia Spring
Stellantis	Fiat / Abarth 500
Hyundai	Hyundai Inster
Stellantis	LP T03
Renault	Renault Twingo
Zhidou	Zhidou D-Series

B segment 35 models

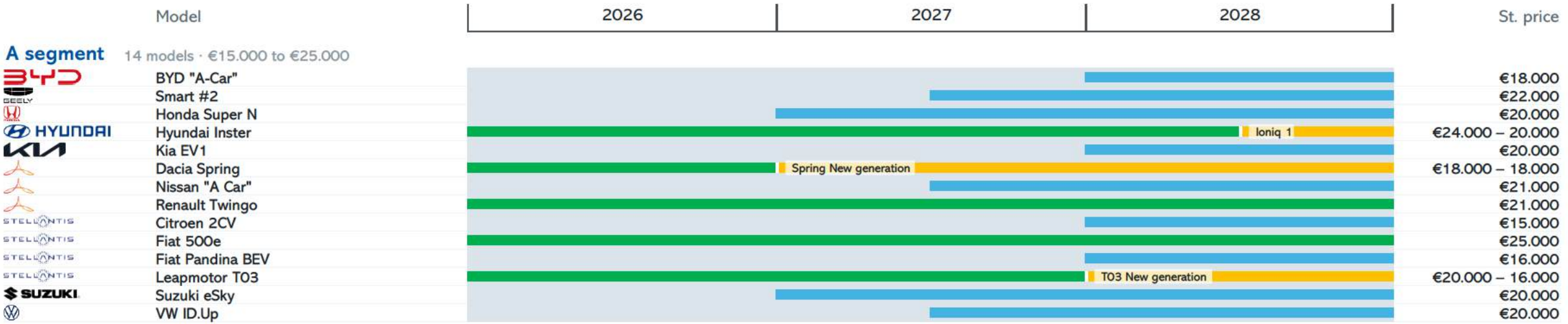
Stellantis	Alfa Romeo Junior
Volkswagen	Audi A2 e-tron
BYD	BYD Dolphin G PHEV
BYD	BYD Seagull / Dolphin Surf
BYD	BYD Yuan Up / Atto-2
Stellantis	Citroen e-C3 Aircross
Stellantis	Citroen e-C3
Volkswagen	Cupra Raval
Dongfeng	Dongfeng Box / N. 01
Stellantis	DS-3 Crossback
Stellantis	Fiat / Abarth 600
Stellantis	Fiat Grande Panda
NIO	Firefly
Ford	Ford Puma
Geely	Geely EX2 / Xingyuan
JAC	JAC Yiwei 3
Stellantis	Jeep Avenger
Kia	Kia EV2

B segment continued

Stellantis	Lancia Ypsilon
Stellantis	LP B03X / A10
BMW Group	Mini Aceman
BMW Group	Mini Cooper
Nissan	Nissan Micra
Stellantis	Opel/Vxh. Corsa-e
Stellantis	Opel/Vxh. Frontera-e
Stellantis	Opel/Vxh. Mokka-e
Stellantis	Peugeot e-2008
Stellantis	Peugeot e-208
Renault	Renault 4
Renault	Renault 5 / A290
Volkswagen	Skoda Epiq
Suzuki	Suzuki eVitara
Toyota	Toyota Urban Cruiser
Volkswagen	VW ID.Cross
Volkswagen	VW ID.Polo

Battery-electric unless stated · status September 2026

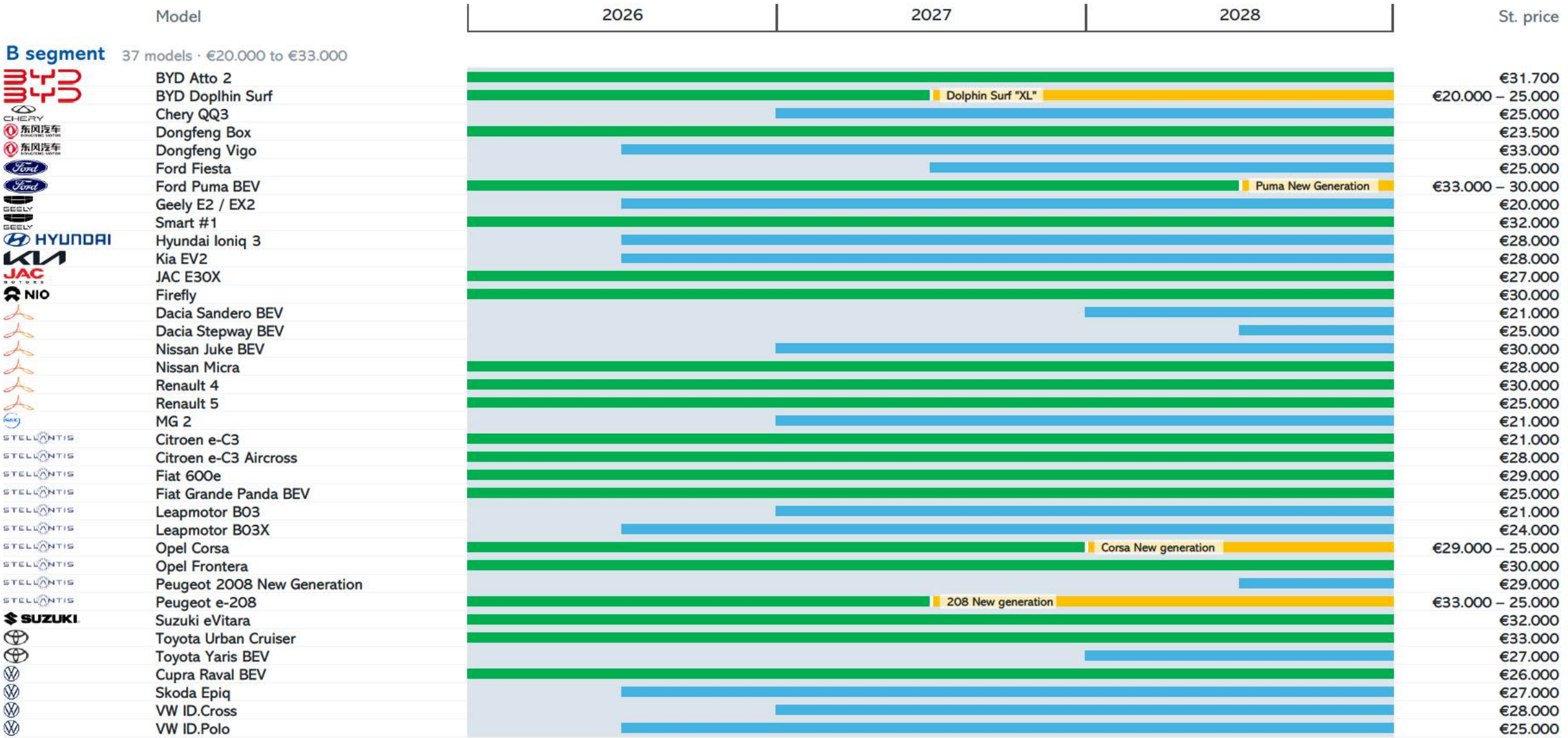
Projections of EV availability in the EU



In production | Announced launch | Successor / update | Half-year resolution

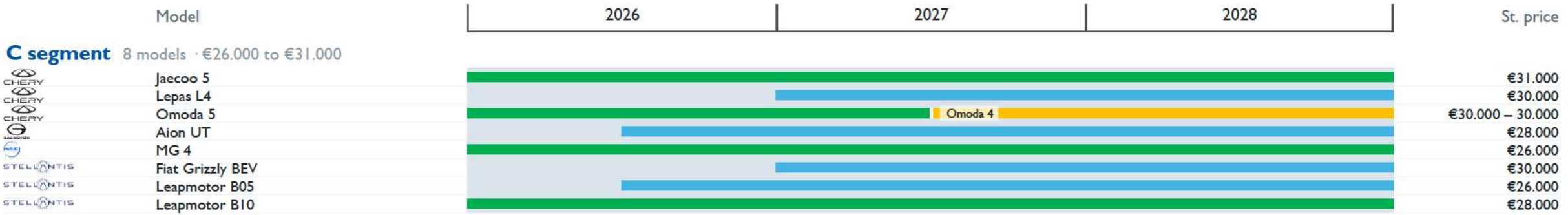
Note: Projections reflect publicly available information at the time of analysis and are subject to change. Model launch dates, specifications and prices are indicative and may differ from actual market introductions.

Projections of EV availability in the EU



Note: Projections reflect publicly available information at the time of analysis and are subject to change. Model launch dates, specifications and prices are indicative and may differ from actual market introductions.

Projections of EV availability in the EU



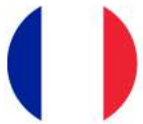
Note: Only C segment models with an expected price below 33,000 Euros are presented.

In production | Announced launch | Successor / update | Half-year resolution

Note: Projections reflect publicly available information at the time of analysis and are subject to change. Model launch dates, specifications and prices are indicative and may differ from actual market introductions.

5 Comparative overview of different income-targeted policy measures

One key observation from each country programme



France

Social leasing proves demand – but important to find sweet spot



Germany

Income graduation improves targeting with relatively simple rules



Italy

Tight targeting and scrappage strengthen additionality



Scotland

0% used-EV finance recycles public capital



Sweden

Dual targeting and used BEVs broaden social accessibility



Latvia

Multidimensional targeting puts used EVs at the centre



Lithuania

Very tight targeting with strong support for used BEVs



Greece

Social leasing uses a clear household affordability target



Luxembourg

Social leasing is relevant, but final design is still emerging



Spain

Useful vehicle-policy reference, but weak on income targeting



United Kingdom

Vehicle caps help affordability



Ireland

Scrappage links EV support directly to replacement of older ICE cars, with rural ring-fencing but no income test



South Korea

Social top-ups can be layered onto a broad EV subsidy



California

The most integrated affordability pathway



Oregon

Sliding used-BEV rebates combine affordability with budget control

Income-targeting approaches in the EU at a glance

Design dimension	France	Germany	Italy	Sweden	Latvia	Lithuania	Greece
Income targeting	✓	✓	✓	✓	✓	✓	✓
Transport / geography	✓	–	✓	✓	✓	✓	✓
Existing car / scrappage	–	–	✓	–	✓	✓	–
Used BEVs eligible	–	–	–	✓	✓	✓	?
Purchase option	–	✓	✓	✓	✓	✓	–
Leasing option	✓	✓	–	✓	–	✓	✓
Vehicle price limit	✓	–	✓	✓	✓	indic.	list

Read-across: no single country provides the complete model; the most relevant design could be a combination of features.

Key design features observed across selected programmes

TARGETING

Income targeting is applied alone or combined with transport-related criteria

Several programmes combine household income with geography, commuting needs or public-transport accessibility; others rely primarily on income thresholds.

Design choices and trade-offs

Income-only is simpler; combined targeting focuses more specifically on transport vulnerability.

Combined criteria add complexity and complexity and boundary effects; effects; income-only does not capture capture actual mobility.

AFFORDABILITY

Programmes differ in whether new and/or used EVs are eligible

Some schemes include the used EV market, while others restrict support to new vehicles. Upfront grants, point-of-sale discounts and subsidised leasing are all observed.

Design choices and trade-offs

Used vehicles broaden the eligible market; leasing reduces upfront capital requirements.

Used vehicles require additional quality/eligibility rules; leasing can involve long-term commitments and no ownership at the end.

ADDITIONALITY

Some programmes link support to replacement of an existing vehicle

Requirements include scrappage, prior vehicle ownership or restrictions on previous EV ownership; other programmes do not impose such conditions.

Design choices and trade-offs

Scrappage/ownership conditions create a clearer link to replacing an existing ICE vehicle.

They can exclude households without an eligible vehicle and make access more complex.

DELIVERY

Different approaches are used to deliver support to households

Examples include point-of-sale discounts, prequalification vouchers, direct grants and subsidies channelled through leasing providers.

Design choices and trade-offs

Point-of-sale and prequalification reduce the amount households need to finance upfront.

They require more coordination with dealers, lessors and administering authorities.

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