

NEWSLETTER

International Regulatory Developments

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EUROPE

Announcement of new EU Commissioners

On 17 September 2024, European Commission President Ms Ursula von der Leyen announced her proposals for the next College of Commissioners.

Ms von der Leyen says the whole college is committed to competitiveness and that the titles of the six Executive Vice-Presidents reflect this. Each Executive Vice-President will have a portfolio to focus on – for which they will have to work with other Commissioners. “Because what affects security affects democracy, what affects the economy affects society, and what affects climate and environment, also affects people and business.”

The EC President has 11 women in her proposed College, meaning 40% of the total. Of the six Executive Vice-Presidents, there are four women and two men. Three are from Member States that joined before the fall of the Iron Curtain. And three from Member States that joined after Europe was reunited.

Ms Teresa Ribera (ES) will be Executive Vice-President of a Clean, Just and Competitive Transition. She will also be responsible for Competition policy. She will guide the work to ensure that Europe stays on track for its goals set out in the European Green Deal, and that the EU decarbonises and industrialises its economy at the same time. Ms von der Leyen’s Mission Letter to Ms Ribera states that Europe’s future competitiveness depends on getting decarbonisation right and ensuring a just transition. To support this, she says Europe needs a new approach to competition policy, ensuring that business has the incentive to invest, innovate and grow. The President also ask Ms Ribera to work on the implementation of the existing legal framework to help reach the EU’s 2030 targets in the simplest, fairest way and in dialogue with all stakeholders. Once the 90% emission reduction target is enshrined in the European Climate Law, the President says it will be necessary to work closely with all stakeholders to prepare a new architecture beyond 2030 to reach net-zero by mid-century.

Mr Stéphane Séjourné (FR) will be the Executive Vice-President for Prosperity and Industrial Strategy. He will also be responsible for the Industry, SMEs and the Single Market portfolio. He will guide the work to put in place the conditions for EU companies to thrive – from investment and innovation to economic stability and trade and economic security.

Mr Wopke Hoekstra (NL) will be the Commissioner for Climate, Net Zero and Clean Growth. He will continue to work on implementation and adaptation, on climate diplomacy and decarbonisation. And he will also be responsible for taxation. The President’s Mission Letter to Mr Hoekstra states that a technology-neutral approach is needed, in which e-fuels have a role to play through a targeted amendment of the regulation setting CO₂ emission performance standards for cars and vans.

Ms Jessika Roswall (SE) will be the Commissioner for Environment, Water Resilience and a Competitive Circular Economy. She will have an important job to help preserve our environment and put nature on the balance sheet. She will help develop a more circular and more competitive economy. And she will lead the work on water resilience which is a big priority for the years ahead. Ms von der Leyen’s Mission Letter to Ms Roswell confirms that part of her role is to lead work on taking forward the EU’s zero-pollution ambition.

Apostolos Tzitzikostas (EL) will be Commissioner for Sustainable Transport and Tourism. He is responsible for mobility of goods and people.

On 19 September 2024, the Council adopted the list of Commissioners-designate, so the European Parliament will now proceed with the formal proceedings for the nomination of the new college. Commissioners-designate appear in public hearings at the European Parliament. After that, the Commission as a whole is approved in a single vote of consent by the Parliament. The European Council, acting by qualified majority, formally appoints the Commission’s new leadership.

The full announcement is available to read at ec.europa.eu/commission/presscorner/detail/en/ip_24_4723.

The EC President’s letters to Commissioners-designate are at commission.europa.eu/about-ec/president-elect-ursula-von-der-leyen/commissioners-designate-2024-2029_en.

Confirmation of the Council’s adoption of the list is at consilium.europa.eu/en/press/pressreleases/2024/09/19/council-adopts-the-list-of-candidates-proposed-for-appointment.

Draghi Report on Future of EU Competitiveness

On 9 September 2024, the European Commission published a report, authored by Mr Mario Draghi, on the competitiveness of the European Union. The report contains recommendations to tackle the economic challenges being faced in the EU, and to reach a stronger position in a world of tough economic competition.

This report identifies three main areas for action to reignite sustainable growth. Firstly, it says Europe must profoundly refocus its collective efforts on closing the innovation gap with the US and China, especially in advanced technologies. The second area for action is a joint plan for decarbonisation and competitiveness. The third area for action is increasing security and reducing dependencies.

Mr Draghi says it is not guaranteed that EU demand for clean tech will be met by EU supply given increasing Chinese capacity and scale. He adds that the EU has ‘effectively abolished’ the internal combustion engine from 2035, when all new passenger cars and light duty vehicles registered in Europe must have zero tailpipe emissions. Based on current policies, the report says Chinese technology may represent the lowest-cost route to achieving some of these targets.

It goes on to say that the automotive sector is a key example of lack of EU planning, applying a climate policy without an industrial policy. The technology neutrality principle has not always been applied in the automotive sector. The ambitious target of zero tailpipe emissions by 2035 will lead to a de facto phasing out of new registrations of vehicles with internal combustion engines and the rapid market penetration of EVs. Yet, the EU has not followed up these ambitions with a synchronised push to convert the supply chain. For example, the Commission only launched the European Battery Alliance to build a battery value chain in Europe in 2017, while Europe as a whole is far behind on installing charging infrastructure. China, by contrast, has been focusing on the full EV supply chain since 2012 and, as a result, it has moved faster and at a larger scale and is now one generation ahead in EV technology in virtually all domains, while also producing at lower cost. European companies are already losing market share, and this trend may accelerate as shipping bottlenecks are overcome. Chinese carmakers' market share for EVs in Europe rose from 5% in 2015 to almost 15% in 2023, while the share of European carmakers in the European EV market fell from 80% to 60%.

In the section focusing on automotive, the report points out that the review of the Fit-for-55 package includes the review of the CO₂ fleet emission regulation and of the Alternative Fuels Infrastructure Regulation (AFIR). This review should follow a technologically neutral approach and should take stock of market and technological developments. The review should also consider the monitoring of the ramp-up of BEVs, their supply chain, related infrastructure needs, and an assessment of the potential and competitiveness of carbon-neutral fuels. The review should also contain an updated impact assessment, carried out in consultation with the industry stakeholders and other relevant partners, of the EU long-term emission reduction targets and their trajectory.

Mr Draghi states that vehicles operating in Europe in 2040 are expected to still include approximately 45% of ICE and hybrid cars, and that emissions reduction for these car types is also important to reach decarbonisation targets. He says an increase in the market penetration of low-emission fuels could compensate for a slower than expected uptake in BEVs. One requirement with respect to regulatory certainty and guidance for R&D and investment in alternative fuels is the clarification of the methodology for emission-neutral fuels, which is still missing.

The report then says the European Commission shall present by 2025 a methodology for the life-cycle assessment ('cradle to grave') of GHG emissions for LDVs. This will be more encompassing than the 'tank-to-wheel' comparison. The life-cycle assessment methodology may help detecting further levers of emission reduction in the automotive industry, including the strengthening of raw material circularity.

The report (Part A and Part B) can be downloaded from commission.europa.eu/topics/strengthening-european-competitiveness/eu-competitiveness-looking-ahead_en.

Council Statement on Procedure for Ambient Air Quality Directive

On 24 September 2024, the Council of the European Union published a statement on the procedure being followed for the proposal for the directive on ambient air quality and cleaner air for Europe.

The Council says that a number of informal contacts have taken place between the Council, the European Parliament and the Commission with a view to reaching an agreement on this legislative file at first reading. It adds that the file was expected to undergo the Corrigendum procedure in the European Parliament after adoption by the outgoing European Parliament of its position at first reading.

At its sitting of 24 April 2024, the European Parliament adopted amendment 355 (without legal linguistic revision) to the Commission proposal and a legislative resolution, constituting the European Parliament's position at first reading. It reflects what had been provisionally agreed between the Institutions.

After finalisation of the adopted text by the legal linguists, the European Parliament approved on 17 September 2024 a corrigendum to the position adopted at first reading. With this corrigendum, the Council should be able to approve the position of the European Parliament as set out in the Annex4 hereto, thus bringing to a close the first reading for both Institutions.

The act would then be adopted in the wording which corresponds to the European Parliament's position.

The Council document is at data.consilium.europa.eu/doc/document/ST-13396-2024-INIT/en/pdf.

ENVI Debate on Operation of Updated EU Climate Legislation

On 12 September, the Environment (ENVI) Committee of the European Parliament held an exchange of views with the Commission on the operation of legislation adopted during the previous terms, such as the Regulation on land use change (LULUCF), the European Climate Law, the Emission Trading System (ETS) and the Effort Sharing Regulation (ESR).

The Commission presented its report evaluating the operation of the LULUCF regulation. With agricultural and forest lands covering more than three-quarters of the EU's territory, the land use sector offers significant carbon sequestration and emission reduction opportunities. However, the report finds that the EU is currently not on track to meet the 2030 net removal target. The Commission also presented a report on the operation of EU climate legislation namely the European Climate Law, the ESR and the ETS Directive, all aiming at reducing and handling carbon emissions.

Finally, the Commission presented the Communication on the evaluation of the Union Civil Protection Mechanism dealing with effectiveness on prevention, preparedness, and response in disaster management.

A video of the debate can be viewed at multimedia.europarl.europa.eu/en/webstreaming/committees_20240912-0900-COMMITTEE-ENVI.

Consultation on Determination of GHG Emission Saving of Low-Carbon Fuels

On 27 September 2024, the European Commission issued a public consultation on the methodology to determine the greenhouse gas (GHG) emission savings of low-carbon fuels.

It states that low-carbon fuels may play a role in the energy transition, particularly in the short and medium term, as they emit fewer emissions than existing fuels and support the uptake of renewable fuels. The EU has a certification procedure in place to ensure that low-carbon fuels reduce emissions in practice, and this delegated act sets out the methodology to determine the GHG emission savings of low-carbon fuels. It is based on a life cycle assessment of the total GHG emissions of these fuels.

The draft Regulation says that the global warming potential of hydrogen has not yet been determined with the level of precision required to be included in the methodology for calculating greenhouse gas emissions. Therefore, relevant values for the global warming potential of hydrogen should be added as soon as scientific evidence has sufficiently matured and is applied to measuring the impact of hydrogen leakage over the whole supply chain in the greenhouse gas emissions accounting methodologies for both low-carbon fuels and renewable fuels on non-biological origin.

The consultation is open until 25 October and is at ec.europa.eu/info/law/betterregulation/haveyoursay/initiatives/14303-Methodology-to-determine-GHG-emission-savings-of-lcf_en.

EESC Statement on EU Climate Target

On 19 September 2024, the European Economic and Social Committee (EESC) issued a statement saying that the European Union should set an ambitious target for 2040, aiming to reduce net greenhouse gas emissions by 90%, in line with its broader goal of achieving climate neutrality by 2050.

The Committee reiterated the need for significant investment in innovation, a skilled workforce, and the full implementation of the 'Fit for 55' legislation, in order to achieve the 2030 interim goal of a 55% emissions reduction. Already at its May plenary, the EESC adopted an opinion outlining the necessary steps to be taken to meet these targets. The Committee also warns against over-reliance on carbon removals, which could be undermined by risks such as forest fires or pest outbreaks, and emphasises the priority of reducing emissions directly.

The EESC emphasises the need for broad stakeholder dialogue, including the social partners, civil society, and citizens, to build public support for the climate plan. The Committee also recommends carrying out a competitiveness check with respect to other major global economies to ensure that Europe's climate policies are economically viable and its industries remain competitive on the global stage.

The EESC press release is available to read at eesc.europa.eu/en/news-media/press-releases/bold-eus-2040-climate-target-indispensable-climate-and-economic-says-eesc.

End to UK Government Funding for Heavy-Duty Retrofit

On 12 September 2024, UK Transport Secretary Ms Louise Haigh announced a permanent end to further government funding for retrofit and the closure of the clean vehicle retrofit accreditation scheme to further accreditations.

The announcement states that in 2021, the government was made aware of new evidence from Scotland suggesting that real-world emission reductions from retrofitted buses were lower than expected. In 2022 a roadside monitoring campaign was commissioned to measure NOx emissions from retrofitted buses in three areas in England which reported in early 2023. The findings were similar to those in Scotland. Government funding for bus retrofits was paused in April 2023 while further research was carried out to understand the causes of poor performance and assess the scope for improvement.

This research was overseen by the Department for Transport (DfT) and Department for Environment, Food and Rural Affairs (Defra) Chief Scientific Advisers, assisted by an external independent expert group. The report concludes that real-world performance of bus retrofit SCR technology is highly variable, achieving 80 to 90% NOx reductions in some cases, but having a minimal effect in others. There is an average 11% reduction in NOx emissions overall from retrofitted buses compared to non-retrofitted Euro V buses, which is significantly lower than the 80% reduction anticipated.

The clean vehicle retrofit accreditation scheme (CVRAS) was launched in 2017 to accredit retrofit technologies that could reduce NOx emissions from buses to close to Euro VI levels. Approximately 9 000 buses in England have been retrofitted with CVRAS-accredited SCR technology.

The research shows that a number of contributing factors can lead to poor performance, including incorrect functioning of retrofit systems, the condition of bus engines and low catalyst operating temperatures. Ms Haigh says that moving forward, the government will work with bus operators and retrofit suppliers to encourage a step change in monitoring and maintenance of retrofit systems to get the best possible performance from the retrofitted buses currently in service. This will include ensuring that buses are providing live data showing retrofit performance so that operators and depots can prioritise and target essential maintenance on the

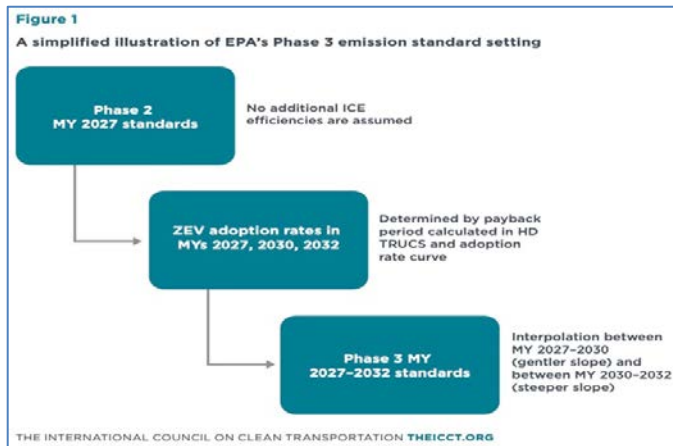
poorest performing buses. Providing this data will be a condition of the buses remaining on the list of CVRAS-accredited vehicles.

The announcement can be found at gov.uk/government/speeches/bus-retrofit-performance.

NORTH AMERICA

ICCT Policy Update on US EPA Phase 3 HDV GHG Emission Standards

On 25 September 2024, the International Council on Clean Transportation (ICCT) published a policy update on the US EPA Phase 3 greenhouse gas emission standards for heavy-duty vehicles (HDVs), published in April 2024.



These standards target substantial reductions in CO₂ emissions from trucks and buses, aiming for up to a 60% emissions reduction for vocational trucks and 40% for tractor trucks by 2032. The new rules allow manufacturers flexibility in how they achieve these goals without mandating the sale of zero-emission vehicles (ZEVs).

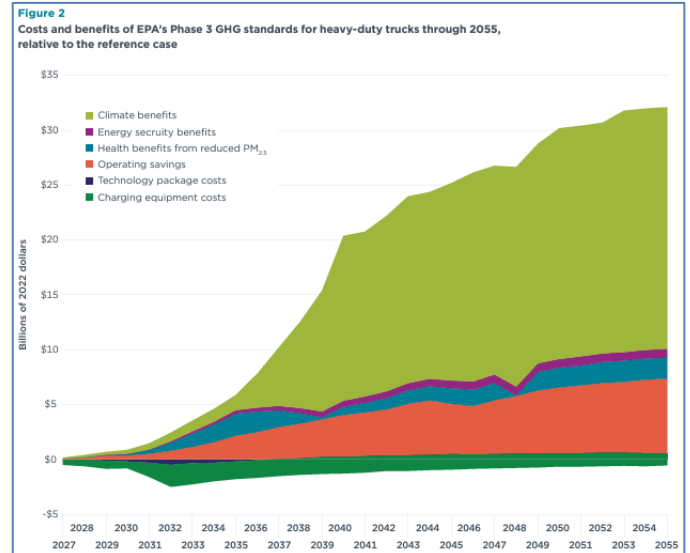
Table 1
EPA's projected zero-emission vehicle shares for the modeled potential compliance pathway

Regulatory group	MY 2027	MY 2028	MY 2029	MY 2030	MY 2031	MY 2032
Light heavy-duty vocational	17%	22%	27%	32%	46%	60%
Medium heavy-duty vocational	13%	16%	19%	22%	31%	40%
Heavy heavy-duty vocational	—	—	13%	15%	23%	30%
Medium heavy-duty all cab and heavy heavy-duty day cab tractors	—	8%	12%	16%	28%	40%
Sleeper cab tractors	—	—	—	6%	12%	25%
Heavy-haul tractors	—	—	1%	1%	3%	5%

The policy update covers: emission standards; updates to the credit averaging, banking and trading system; hydrogen internal combustion engine vehicles; battery health, durability and warranty.

It goes on to look at projected benefits of the standards according to the EPA, before considering the 2026 assessment of charging sites, sales of EV service equipment,

charging facility installation timelines, electric distribution system upgrades, and hydrogen fuel production and fuelling station developments.



ICCT's update concludes by looking at the policy context in other markets, namely the EU and California.

The policy update can be downloaded from theicct.org/publication/us-epa-phase-3-ghg-emission-standards-for-hdv-sept24.

UNITED NATIONS

International Day of Clean Air for Blue Skies

On 7 September 2024, the world marked the fifth annual UN International Day of Clean Air for blue skies, with calls for investment in clean air solutions now, as air pollution causes increasing public health, environmental, and economic harms. The UN says more than 99% of humanity is now breathing polluted air, leading to more than 8 million annual deaths, including more than 700 000 children under five.

It adds that dirty air disproportionately affects more vulnerable populations such as women, children and older people. Air pollution has become the second leading risk factor for early death globally, overtaking tobacco for adults and second only to malnutrition for children under five. According to the UN, less than 1% of international development funding is dedicated to tackling it.

The UN Secretary-General said that "Investing in clean air requires actions by both government and businesses to phase out fossil fuels, strengthen air quality monitoring, enforce air quality standards, boost renewable energy, transition to clean cooking, build sustainable transport and sustainable waste management systems, clean up supply chains, and reduce harmful emissions, including methane."

UNEP Executive Director Inger Andersen said, "We are asking nations, regions and cities to establish robust air quality standards by backing renewable energy and

sustainable transport, holding industry to account with strict emission standards, and integrating air quality into climate action.”

The full UNEP press release can be found at [unep.org/news-and-stories/press-release/clean-air-day-highlights-urgent-need-invest-air-pollution-solutions](https://www.unep.org/news-and-stories/press-release/clean-air-day-highlights-urgent-need-invest-air-pollution-solutions)

GENERAL

HEAL Call for Action on Clean Air

On 2 September 2024, the Health and Environment Alliance (HEAL) issued a press release in advance of the International Day of Clean Air for blue skies (see above) on 7 September.

HEAL states that air pollution is the leading environmental health threat in Europe, yet with targeted policy measures it can be largely preventable. It adds that there is growing evidence that the unequal exposure to air pollution across and within European countries, regions, and cities continues to worsen health impacts. Urgent and more ambitious action to achieve clean air is needed, HEAL says.

The NGO points out that the revised Ambient Air Quality Directive (AAQD) will help improve air quality for all in the EU by setting stricter limits on harmful air pollutants. It emphasises the need to protect vulnerable groups, which can help reduce health inequalities linked to socio-economic status. It also mandates more comprehensive air quality monitoring, which can help identify pollution hotspots in disadvantaged neighbourhoods.

The HEAL press release is at env-health.org/clean-air-day-time-to-act-to-tackle-socio-economic-inequality-and-protect-health-especially-in-cities.

EU Healthy Air Coalition Letter on Clean Air Measures

On 5 September 2024, the EU Healthy Air Coalition (EUHAC) wrote to President von der Leyen with a call to strengthen EU's clean air measures to 'sustain the EU's quality of life and ensure greater preventative health.'

In particular, EUHAC calls for swift implementation and enforcement of the revised EU Ambient Air Quality Directive (AAQD), as well as strengthened efforts to tackle air pollution at the source. It also wants to see the EU properly addressing the 'slow pace and narrow scope' of mandatory decrease of pollutant emissions at national level, both in the framework of the evaluation of Directive (EU) 2016/2284 on the reduction of national emissions of certain atmospheric pollutants (NECD) and through the revision of the Gothenburg Protocol on Long-Range Transboundary Air Pollution.

The letter can be read in full at env-health.org/wp-content/uploads/2024/09/EUHAC_Letter-to-President-von-der-Leyen_Clean-Air-Day-2024.pdf.

ICCT Research Brief on CO₂ Emissions from new Passenger Cars in Europe

On 18 September 2024, the International Council on Clean Transportation (ICCT) published a research brief on CO₂ emissions from new passenger cars in Europe, looking particularly at manufacturers' performance in 2023. The analysis is based on preliminary data from the European Environment Agency (see AECC Newsletter of June 2024).

The study finds that all manufacturers met the EU CO₂ emission targets. The average emissions fell 1 g/km compared to 2022, marking a decrease of 1.5%. In total, 10.7 million new cars sold in 2023 had average CO₂ emissions of 107 g/km, as measured by the Worldwide Harmonized Light Vehicles Test Procedure (WLTP).

The briefing details manufacturer performance in terms of CO₂ emissions reduction, fuel type and technology trends, and market share. It also examines country-specific differences and compliance strategies.

ICCT says the pace of CO₂ emission reductions has varied over the years, with reduction rates generally accelerating as deadlines approach. Between 2000 and 2007, before the first standards were agreed in 2008, fleet CO₂ emissions, on average, declined by 1.9 g/km per year. From 2008 to 2015, manufacturers exceeded the annual reduction rates required to meet the 2015 target of 130 g/km. Rather than the required 3.6 g/km annual reduction, average CO₂ emissions dropped by 4.9 g/km per year. All manufacturers met their target in 2015. From 2015 to 2019, with no stricter targets in place before 2020, average CO₂ emissions increased by 0.7 g/km per year. As the next target approached, a significant turnaround occurred from 2019 to 2020, when emissions dropped by an average of 14 g/km. All manufacturers met the 2020 target of 95 g/km using flexible compliance mechanisms.

Figure 1. Historical average NEDC and WLTP CO₂ emission values and targets for new passenger cars without flexible compliance mechanisms



In 2021, the transition from NEDC to WLTP took place. Removing the 2020 phase-in provisions required another significant drop in fleet-average CO₂ emissions to meet the equivalent WLTP target. ICCT says that since 2021, manufacturers face little pressure to further reduce CO₂ emissions until the next round of targets in 2025–2029. As a result, 2022 and 2023 reductions occurred at a slower pace.

The ICCT brief can be found at theicct.org/publication/co2-emissions-new-pv-europe-car-manufacturers-performance-2023-sept24.

Green NCAP Request to Industry for more Sustainable ICE Innovations

On 26 September 2024, Green NCAP released its latest set of ratings. The all-electric vehicles (EVs) in the line-up achieve the maximum score of five stars, raising the question, according to Green NCAP, of what technological innovations can ensure internal combustion engines (ICE) also remain viable in a world that demands cleaner, more sustainable transportation.

Green NCAP says its results suggest that ICEs – particularly those running on petrol and diesel – face significant challenges.

To score higher in future rounds of testing, especially with plans to tighten the assessment protocols in 2025, it states that manufacturers of ICE vehicles will need to adopt increasingly advanced emissions control technologies, improve fuel efficiency, and explore improved implementation of hybridisation. Reducing vehicle mass and introducing designs with less aerodynamic resistance are also possible routes for lowering environmental impact.

The Green NCAP press release is at greenncap.com/press-releases/green-ncap-asks-industry-for-more-sustainable-innovations-for-ice-vehicles.

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FORTHCOMING CONFERENCES

Aachen Colloquium Sustainable Mobility

7-9 October 2024, Aachen, Germany

aachener-kolloquium.de/en

Future of Biofuels

23-24 October 2024, Copenhagen, Denmark

fortesmedia.com/future-of-biofuels-2024,4,en,2,1,104.html

Ricardo Motorcycle Conference

4 November 2024, Milan, Italy

ricardo.com/en/news-and-insights/events-and-webinars/ricardo-motorcycle-conference

FAD-Conference “The Challenge – Exhaust Aftertreatment”

6-7 November 2024, Dresden, Germany

fad-diesel.de/event/21-fad-konferenz-herausforderung-abgasnachbehandlung

FISITA World Mobility Summit

13-14 November 2024, Warren, USA

events.fisita.com/event/Summit2024

POLIS Conference 2024

27-28 November 2024, Karlsruhe, Germany

polisnetwork.eu/2024-annual-polis-conference

8th European Conference on Results from Road Transport Research Projects (RTR)

11-13 February, Brussels, Belgium

rtrconference.eu

International Automotive Recycling Congress

19-21 March 2025, Antwerp, Belgium

events.icm.ch/event/IARC2025

SAE WCX World Congress

8-10 April 2025, Detroit, USA

wcx.sae.org

Heavy-Duty Sustainable Transport Symposium

7-8 May 2025, Gothenburg, Sweden

sae.org/attend/heavy-duty-sustainable-transport-symposium

Vienna Motor Symposium

14-16 May 2025, Vienna, Austria

oevk.eventsair.com/motorensymposium2025abstracts/en/Site/Register

Shanghai-Stuttgart Symposium 'Automotive and Powertrain Technology

22-23 May 2025, Shanghai, China

fkfs-veranstaltungen.de/veranstaltungen/shanghai-stuttgart-symposium

SIA Powertrain 2025

11-12 June 2025, Port Marly, France

sia.fr/evenements/376-powertrain-SIAPowertrain2025