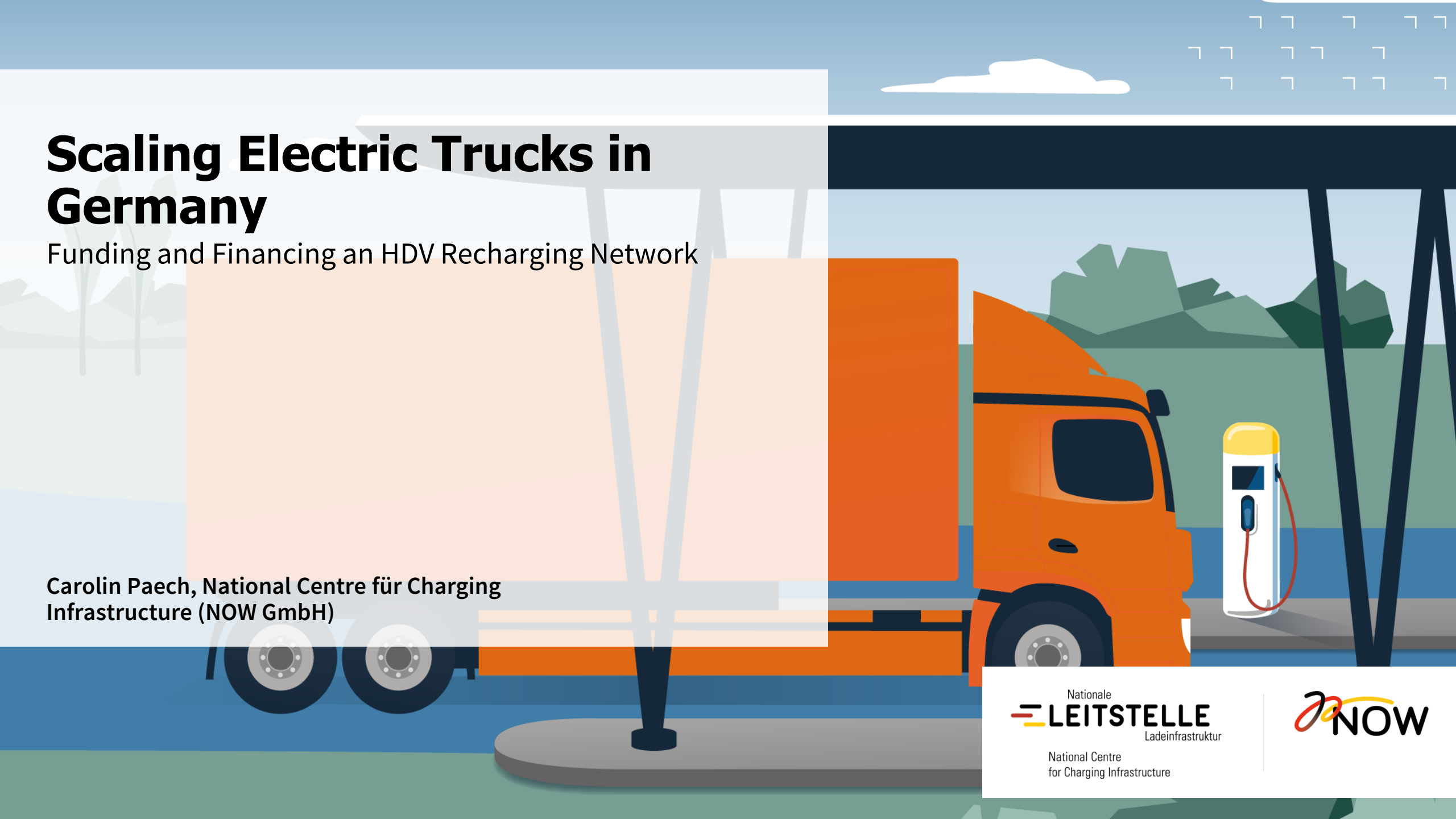
Scaling Electric Trucks in Germany

Funding and Financing an HDV Recharging Network



Carolin Paech, National Centre für Charging Infrastructure (NOW GmbH)

Nationale LEITSTELLE Ladeinfrastruktur

National Centre for Charging Infrastructure

NOW

Who we are

Nationale
LEITSTELLE
Ladeinfrastruktur

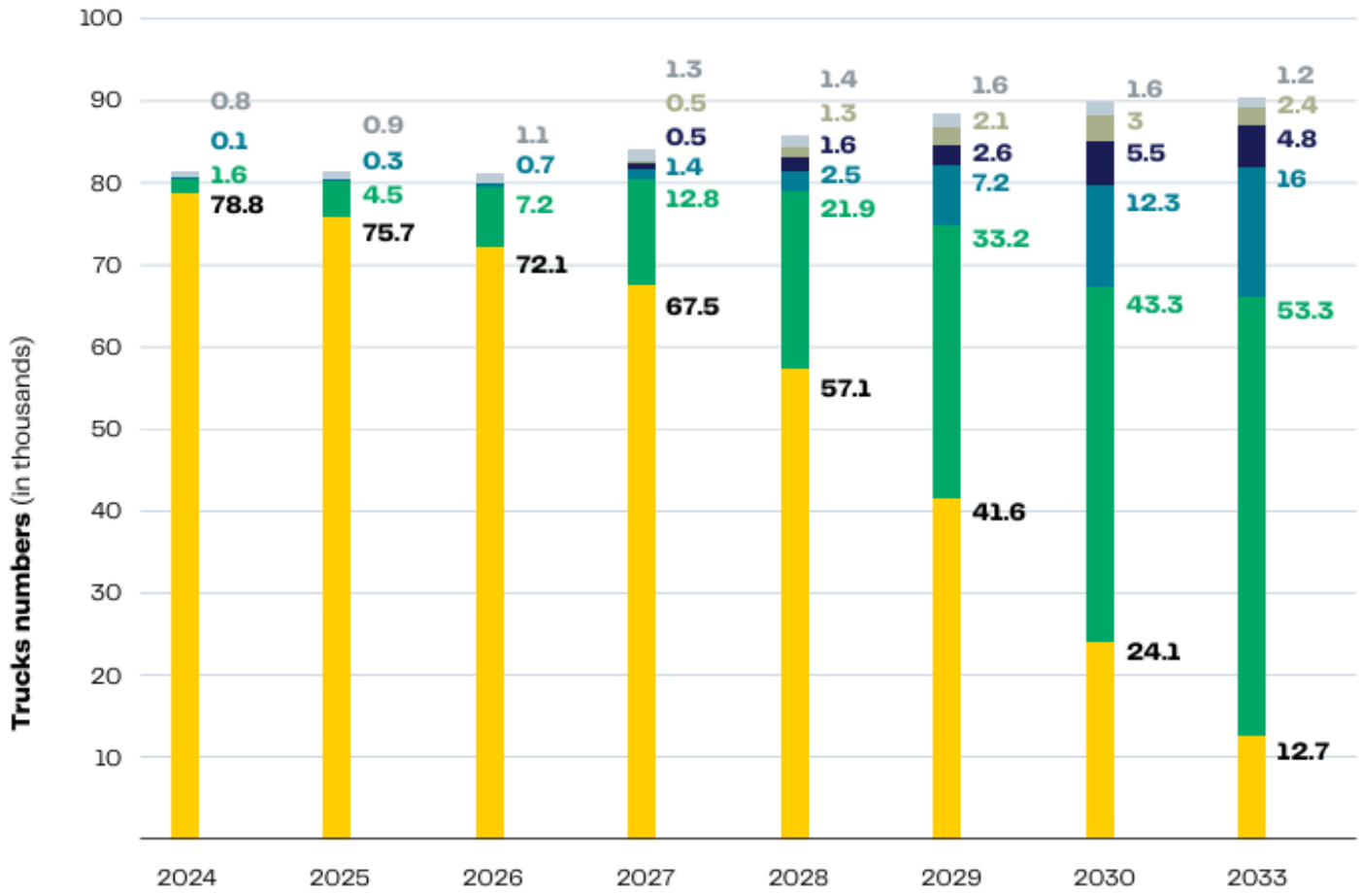
National Centre
for Charging Infrastructure

Commissioned by:

Federal Ministry
of Transport

Where do we stand?

Forecast sales figures for heavy-duty vehicles (N3/> 12 t)
In Germany, according to manufacturer data



H_2 fuel cell
Battery
Diesel
Bio gas
Plug-in hybrid
H_2 combustion

Note:
The response rate in relation to the current market shares was 96 percent.
The values have been rounded for better readability.

Nationale LEITSTELLE Ladeinfrastruktur
National Centre for Charging Infrastructure

Planning - Data Based Approach

Input

Cleanroom-data

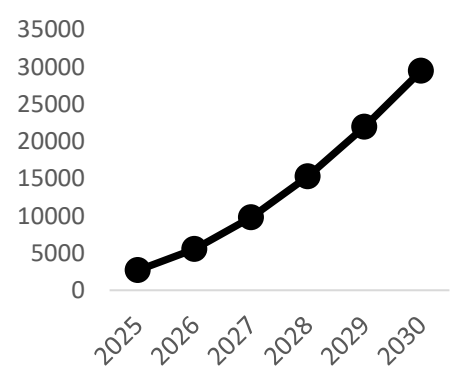
Toll data

Data collection tool for rest facilities

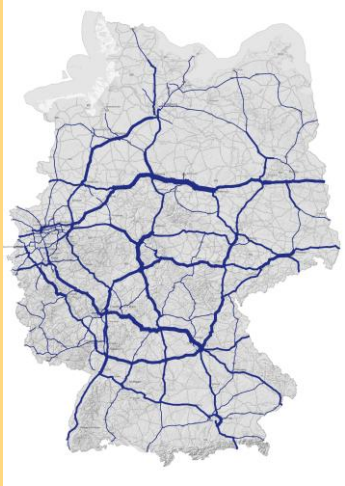
Toll data

Analysis

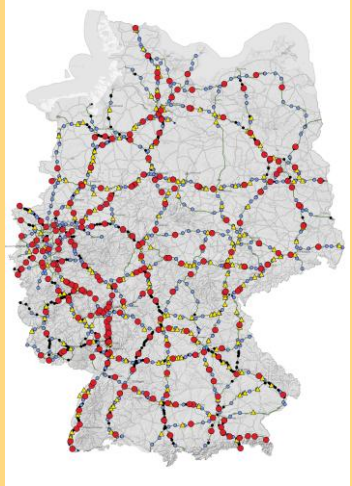
Determining Charging Demand in Germany



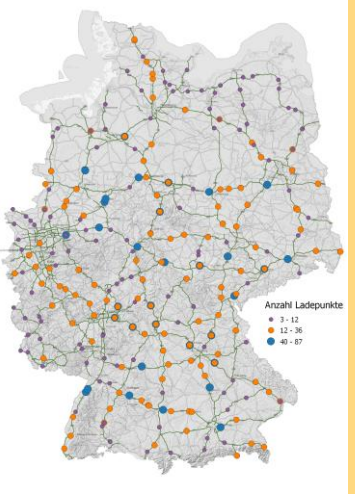
Allocate charging requirements to a section of the route



Selecting Suitable Charging Locations



Scaling of the Sites



Nationale LEITSTELLE Ladeinfrastruktur
National Centre for Charging Infrastructure

Political Framework

Significant political importance

Anchored in the **coalition agreement**

Central **Roadmap** for the Implementation of Climate Protection Measures in Road Freight Transport by 2030

Further key policies:
e.g., **toll exemptions, GHG quotas, vehicle tax exemptions, fleet targets, AFIR**

Toll exemption for zero-emission commercial vehicles until June 30, 2031

15.5 cents for infrastructure costs
15.8 cents for CO2 emissions
2.3 cents for air pollution
1.2 cents for noise pollution

34,8 cents/km

0 cents for infrastructure costs
0 cents for CO2 emissions
0 cents for air pollution
0 cents for noise pollution

0 cents/km

Savings of 35,000 €/a

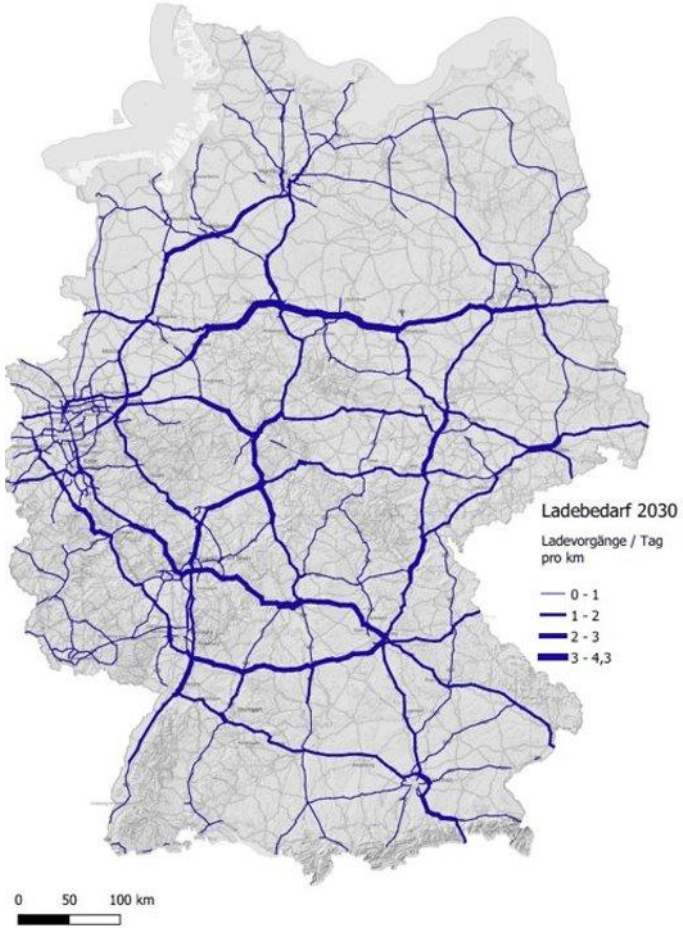
More info:

(Basis for calculation: Trucks >18 metric tons with 5 axles: diesel trucks (EK1, Euro VI) and electric trucks (EK5) traveling 100,000 km per year on toll roads)

Nationale LEITSTELLE Ladeinfrastruktur
National Centre for Charging Infrastructure

Funding and Financing

HDV Recharging Network



- **AFIR Target**: Establish a publicly accessible truck charging infrastructure along the TEN-T network by 2030
- Coverage along the corridors: generally **every 60 km** on the core network and **every 100 km** on the overall network
- **Germany**: HDV Recharging Network as basic service with approximately **350 locations** and about **4,200 MCS and CCS** charging points
- The network covers approximately **two-thirds of charging demand**; private development of additional charging infrastructure near highways remains necessary

HDV Recharging Network

Unmanaged Rest Facilities: Winners of the Tender

STRA-loaded electrive, 19.11.2024

eliso Voltix Charging GmbH, LinkedIn, eliso, 10.07.2026

E.ON Drive & mblty, LinkedIn, EDRI, 03.07.2026

Electric Mobility Infrastructure Deutschland GmbH
LinkedIn, engie, 04.07.2026

autostrom.plus GmbH
PM Autostrom.Plus, 07.07.2026

HDV Recharging Network

Second Tender in the Making: Managed Rest Facilities

- tender for the construction and operation of charging infrastructure at **>220 managed rest areas**
- delay due to legal uncertainty: following the higher regional court ruling in March 2026, the way is clear
- the goal is a uniform charging network for heavy-duty commercial vehicles **based on the first tender**
- bidding process in preparation: set to begin in soon.

Funding program for publicly and non-publicly accessible charging infrastructure for heavy-duty commercial vehicles

- **€1 billion** in funding over four years for the development of publicly and non-publicly accessible charging infrastructure
- Funding for **DC charging infrastructure**, including grid connection, battery storage, and charging, load, and energy management
- **Yearly** funding calls
- Goal: to accelerate infrastructure development, support the ramp-up of the electric truck market, and contribute to reducing greenhouse gas emissions in road freight transport

Implementation

Identifying Challenges and Implementing Adjustments

- Grid connections in time
- Sufficient space for charging infrastructure
- financing + knowledge in transport sector

Nationale LEITSTELLE Ladeinfrastruktur
National Centre for Charging Infrastructure

Mission to e-HDV

01 Planning

Data-based approach
Monitoring

02 Political Framework

Create enabling conditions

03 Funding & Financing

Goal-oriented
Integrated

04 Implementation

Make necessary adjustments

Combined measures

- **Evidence-led**

Planning starts from data and is continuously monitored.

- **Coordinated**

Policy, funding and implementation reinforce each other.

- **Adaptive**

Implementation feeds lessons back.

Nationale
LEITSTELLE
Ladeinfrastruktur
National Centre
for Charging Infrastructure
NOW
Thank you!
Einfach laden. Daran arbeiten wir.
nationale-leitstelle.de/en
Follow us on LinkedIn