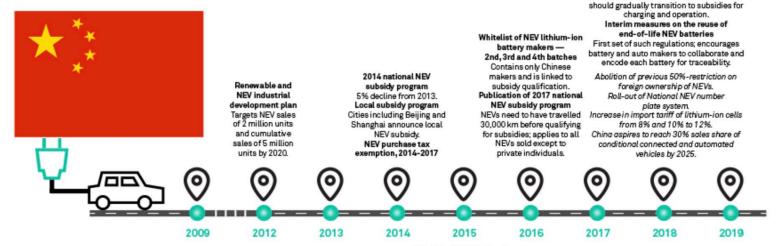


I begynnelsen skapte Kina et sett med subsidier...

Timeline of key Chinese NEV policies, 2009-2019



Renewable and NEV pilot program

Subsidies provided for procuring NEV within public services. Entry requirements on NEV manufacturing enterprises and products Sets regulatory criteria for NEV makers.

S&P Global Market Intelligence

As of November 2019. NEV = new energy vehicle MIIT = Ministry of Industry and Information Technology ICE = internal combustion engines Wh/kg = watt-hours per kilogram Image credit: Rameez Ali Source: S&P Global Market Intelligence

2013 national NEV subsidy program

Sets out the full central government subsidy program for 2013. **NEV** promoter cities list Cities can apply for NEV promoter status by submitting their local NEV promotion program. Beijing exempts NEVs from plate number lottery system.

Whitelist of NEV lithium-ion battery makers - 1st batch Contains only Chinese makers and is linked to

subsidy qualification. Guidance on NEV charging infrastructure development

coverage for new residential construction complexes. Finance Minister announces NEV subsidies to end by 2020.

Medium- to long-term development plan for automotive industry targets:

- Cell specific density > 300 Wh/kg - System specific density > 260 Wh/kg By 2025:

Recommends 100% NEV charging - System specific density > 350 Wh/kg - NEV sales share of 20%

Dual credit policy, 2018-2020 To be implemented in April 2018. NEV production share set at 10% and 12% of total in 2019 and 2020, respectively, as part of calculation for positive NEV credit.

NEV purchase tax exemption, 2018-2020

MIIT considers banning sale of new/CE vehicles.

2019 national NEV subsidy program Localities' NEV purchase subsidy to By 2020:

2018 national NEV subsidy program

Lowers distance travelled threshold to 20,000 km. Localities' NEV sales subsidies

> phase out by June. Interim measures on the reuse of end-of-life NEV batteries (update)

Requires at least 85% of the lithium content to be recycled.

Dual credit policy, 2021-2023 discussion document

Sets NEV production share at 14% in 2021, 16% in 2022 and 18% in 2023 higher than 2019 and 2020 rates. Higher threshold to qualify for credits.

Central government asks localities to remove existing driving or purchasing restrictions on NEVs.

Abolition of whitelist NEV lithium-ion battery makers, a step toward a more market driven sector.

The MIIT announces no-ICE experimental areas pilot program as first step toward banning all ICE.

Geopolitikk, geo-economics eller strategisk kapitalisme?

Ny struktur

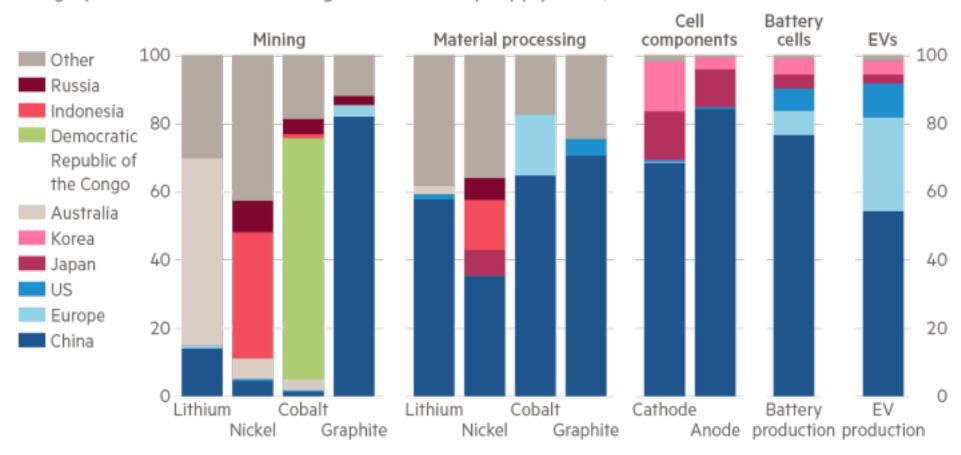
- Vi går mot en bipolar verden: USA vs Kina
- Europa må finne sin plass - 'strategic autonomy'
- Biden: vi må vinne 'the strategic competition for the 21th century'

Ny type konkurranse

- Ikke kald krig (enda...?)
- Økonomisk makt sentralt
 - Før: 'Absolutt gains' er ok
 - Nå: Pass på 'relative gains'
- Statens rolle
 - Før: aktiv industipolitikk nei
 - Nå: aktiv

China dominates the downstream electric vehicle battery supply chain

Geographical distribution* of the global EV battery supply chain, 2022 (%)



^{*} Refers to the country where the production occurs

Percentages for mining and EV output based on actual production. All other percentages are based on production capacity

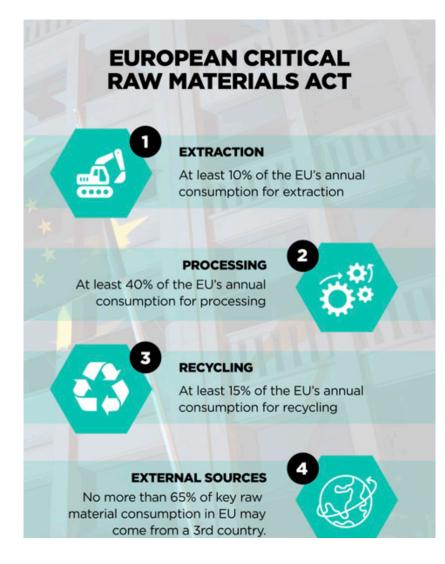
Source: IEA

IRA: Geopolitiske grep

- Subsidier til EV gis dersom en stor andel av batteriet er fra USA/resirkulert i USA eller fra amerikanske handelspartnere (FTA)
- Ingen subsidier dersom batterimaterialene er fra 'Foreign Entity of Concern' (FEOC)
 - FEOC = Kina, Russland, Nord Korea og Iran
- 'Friendshoring' satt i system

- Særlig gunstig for FTA landene
 - Mexico
 - Canada
 - Marokko
 - Chile
 - Korea
- Japan lagt til etter egen Critical Raw Materials Agreement, 2023





THE NET-ZERO INDUSTRY ACT paves the way for domestic manufacturing to meet 40% of the EU's annual deployment needs by 2030.

ANNUAL MANUFACTURING TARGETS FOR SELECT TECHNOLOGIES BY 2030

30 GW SOLAR PHOTOVOLTAIC



36 GW

550 GWh

BATTERIES



31 GW HEAT PUMPS



100 GW boost production to achieve installed capacity by 2030.

Data accessed Mar. 16, 2023. Design credit: Cat VanVliet. Source: European Commission. © 2023 S&P Global. Implikasj oner for Norge

