- Nordic electric vehicle market overview with the latest sales figures, infrastructure overview and the main market tendencies
Q4 OUTLINE

CAR SALES
PHEVs and EVs sold in the Nordics:

<table>
<thead>
<tr>
<th>Country</th>
<th>PHEV</th>
<th>EV</th>
</tr>
</thead>
<tbody>
<tr>
<td>DK</td>
<td>223</td>
<td>644</td>
</tr>
<tr>
<td>NO</td>
<td>4,775</td>
<td>2,882</td>
</tr>
<tr>
<td>SW</td>
<td>6,923</td>
<td>901</td>
</tr>
<tr>
<td>FI</td>
<td>352</td>
<td>61</td>
</tr>
</tbody>
</table>

CAR MODELS
New EV and PHEV models each year:

- **2014**
  - Most popular model: Mitsubishi Outlander
  - New PHEV models: Mitsubishi Outlander
  - New EV models: Nissan Leaf

- **2015**
  - Most popular model: Mitsubishi Outlander
  - New PHEV models: Mitsubishi Outlander
  - New EV models: Volkswagen E-golf

- **2016**
  - Most popular model: Mitsubishi Outlander
  - New PHEV models: Mitsubishi Outlander
  - New EV models: Volkswagen E-golf

CAR SALES IN TOTAL
Percentages of cars sold across the Nordics:

- **Denmark**
  - 3.7%
  - 3.8%

- **Sweden**
  - 0.3%
  - 0.7%

- **Finland**
  - 2.8%
  - 0.8%

- **Norway**
  - 99.9%
  - 96.4%

- **Nordics**
  - 92.5%

NUMBER OF CHARGING PLUGS
Total number of charging plugs across the Nordics:

- **DK**
  - Type 2: 65
  - CCS: 659
  - CHAdeMo: 136
  - Tesla SC: 136
  - Other (<=22kW): 214

- **NO**
  - Type 2: 217
  - CCS: 436
  - CHAdeMo: 173
  - Tesla SC: 173
  - Other (<=22kW): 214

- **SW**
  - Type 2: 7,040
  - CCS: 561
  - CHAdeMo: 1654
  - Tesla SC: 1654
  - Other (<=22kW): 173

- **FI**
  - Type 2: 74
  - CCS: 119
  - CHAdeMo: 706
  - Tesla SC: 706
  - Other (<=22kW): 80
ABBREVIATIONS AND TERMINOLOGY

**Charging plug** – Plugs to be inserted in electric vehicles to charge them

**Charging point** – Unit/location, which may have one or more charging plugs

**EV** – Electric Vehicle (car or van)

**PHEV** – Plug-in Hybrid Electric Vehicle

**BEV** – Battery Electric Vehicle

**YTD** – Year-To-Date

---

**Car segments used in Insero Quarterly:**

- **A-segment** = Mini cars (e.g. Fiat 500)
- **B-segment** = Small cars (e.g. Renault Clio)
- **C-segment** = Medium cars (e.g. VW Golf)
- **D-segment** = Large cars (e.g. BMW 3 series)
- **E-segment** = Executive cars (e.g. Mercedes E Class)
- **J-segment** = SUV cars (e.g. BMW X5)
- **Van-segment** = Vans (e.g. VW Transporter)

---

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WHAT THE LATEST NORDIC FIGURES TELL US

• **Total number of electric vehicles:** 162,323 [Check out the figures]

• **Q4 sales:** 16,761 vehicles (record) [Check out the figures]

• **Best selling vehicle class:** PHEV segment [Check out the figures]

• **YTD sales:** 61,848 [Check out the figures]

• **Infrastructure roll-out:** 338 new plugs added [Check out the figures]

• **EV Incentives:** Q4 saw no new significant changes, however Danish politicians are talking about how to stimulate EV uptake. [Check out more]

• **New car models:** Hyundai IONIQ EV
DENMARK | THE MAIN TENDENCIES FROM DENMARK

• **Q4 sales**: 867 vehicles [Check out the figures]

• **YTD sales**: 1967 vehicles [Check out the figures]

• **Infrastructure roll-out**: 55 new plugs added [Check out the figures]

• **Incentives for electric vehicles**: Politicians are discussing how to re-establish EV uptake [Check out more]

• **Most popular BEV**: Renault ZOE

• **Most popular PHEV**: VW Passat GTE

• **Other highlights**: 2016 was a horrible year for the Danish EV market due to registration tax on EVs. Tesla sales has more or less vanished.
NORWAY | THE MAIN TENDENCIES FROM NORWAY

- **Q4 sales:** 11,698 vehicles (record)  
  [Check out the figures](#)

- **YTD sales:** 45,384 vehicles  
  [Check out the figures](#)

- **Infrastructure roll-out:** 89 new plugs added  
  [Check out the figures](#)

- **Incentives for electric vehicles:** No significant changes were registered in Q4  
  [Check out the figures](#)

- **Most popular BEV:** BMW i3  
  [Check out more](#)

- **Most popular PHEV:** Mitsubishi Outlander PHEV

- **Other highlights:** The Hyundai IONIQ successfully penetrated the Norwegian market with 641 new registrations. Tesla Cannibalization continues.
SWEDEN | THE MAIN TENDENCIES FROM SWEDEN

• **Q4 sales:** 3,783 vehicles (record) [Check out the figures](#)

• **YTD sales:** 13,079 [Check out the figures](#)

• **Infrastructure roll-out:** 129 new plugs added [Check out the figures](#)

• **Incentives for electric vehicles:** No significant changes were registered in Q4 [Check out the figures](#)

• **Most popular BEV:** Tesla Model S

• **Most popular PHEV:** VW Passat GTE

• **Other highlights:** PHEVs continue to dominate, while Tesla Cannibalization seems not to be in evidence on the Swedish EV market.
FINLAND | THE MAIN TENDENCIES FROM FINLAND

Q4 sales: 413 vehicles (record) Check out the figures

YTD sales: 1418 vehicles Check out the figures

Infrastructure roll-out: Tesla adds several new charges, - indicates that the Finnish BEV market is on the verge of an uptake? Check out the figures

Incentives for electric vehicles: No significant changes were registered in Q4 Check out the figures

Most popular BEV: Tesla Model X

Most popular PHEV: VW Passat GTE

Other highlights: The Finnish EV market is dominated by vehicles with a long range, as 94% of new registrations were either a Tesla or PHEV
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</tbody>
</table>
The Nordic electric vehicle market had another record breaking quarter in Q4, however, sales are stabilizing.

- The total EV stock increased with 16,761 vehicles in Q4.
- Total 2016 EV sales in the Nordic Region reached 61,848 vehicles.
- The C- and PHEV-segments dominated the Nordic EV market in Q4, as they accounted for more than 80% of sales.
- Q4 confirmed that tax exemptions significantly affect EV sales, as the Danish market saw frontloading of sales due to increased registration tax as of January 2017.

- Sweden and its massive fleet of PHEVs is gaining ground, while the Norwegian EV sales is stabilizing.
- Q4 raises the bar for EV sales in the Nordic region; Norway, Sweden and Finland has their best selling quarter.

If you are interested in a more detailed analysis, get in touch with us [here](#).
Nordic | Despite stabilizing sales in Norway and Sweden, all countries except Denmark, which is still struggling to find foothold after the introduction of registration tax on EVs, had their best selling quarter ever.

- Purchase incentives on EVs are still regulating market diffusion; Danish sales plummet after the introduction of registration tax.
- Norwegian sales is stabilizing, with a difference of only 575 registrations between the best and worst selling quarter in 2016.
- PHEVs flourish in Sweden and Finland resulting in significant sales growth.

- Sweden and Norway drive EV sales in Nordic region, Finland almost on par with Denmark.
- Market composition expected to change in 2017 with Finland and Sweden taking market share from Norway.
- Increased registration tax on EVs detrimental towards EV uptake, Denmark is expected to remain in a slump in 2017.

If you are interested in a more detailed analysis, get in touch with us here.
The Nordic electric vehicle market saw record quarters in Norway, Sweden and Finland in Q4, while Danish sales increased as expected due to the introduction of 40% tax on EVs in 2017.

- Q4 breaks the record; Norway, Sweden and Finland showing impressive sales.
- Sales growth slowed down in 2016; year-over-year sales increased with 29% compared to 2015.
- Nordic EV sales are stabilizing; the effects of the current incentives structure seem to be decreasing.
- 2017 will be an interesting year for EVs:
  1. Denmark increases registration tax to 40%
  2. Norwegian EV market seems to be maturing
  3. Can Finland and Sweden continue the positive PHEV trend?

Sweden and Norway keep delivering; Q4 2016 beats Q4 2015 with 11% despite Danish slump.

Sales is stabilizing; Q4 saw relatively stable sales throughout the period.

15,000 seems to be the magic number; Nordic EV sales surpass 15,000 vehicles for the fifth consecutive quarter.

If you are interested in a more detailed analysis, get in touch with us here.
Nordic | PHEVs are taking control; already the preferred EV in Finland and Sweden, while popularity is growing in Norway and Denmark. Range, performance, price and model selection are superior compared to the currently available BEVs.

- PHEVs are the preferred drivetrain in both Sweden and Finland; account for respectively 76% and 85% of sales.
- BEVs remain the preferred EV in Norway, however, PHEVs are steadily becoming more popular.
- BEVs dominate the Danish market; Sales fueled by car sharing companies establishing a large fleet of i.e. Renault Zoe.
- PHEVs have taken significant market share from BEVs compared to Q4 2015

Q4 sales by type (BEV/PHEV)

<table>
<thead>
<tr>
<th>Country</th>
<th>BEV</th>
<th>PHEV</th>
</tr>
</thead>
<tbody>
<tr>
<td>DK</td>
<td>644</td>
<td>223</td>
</tr>
<tr>
<td>NO</td>
<td>644</td>
<td>223</td>
</tr>
<tr>
<td>SW</td>
<td>901</td>
<td>378</td>
</tr>
<tr>
<td>FI</td>
<td>354</td>
<td>413</td>
</tr>
<tr>
<td>Q4 2016</td>
<td>8.233</td>
<td>9.922</td>
</tr>
<tr>
<td>Q4 2015</td>
<td>5.145</td>
<td>6.924</td>
</tr>
</tbody>
</table>

Q4 sales composition

- PHEVs on par with BEVs; Despite the Norwegian market still preferring BEVs, PHEVs are gaining ground, and are yet to become the preferred drivetrain in the Nordic Region.
- PHEVs accommodate customer demand and range anxiety; combine the convenience of driving an EV with the range of ICE cars.

If you are interested in a more detailed analysis, get in touch with us here
Denmark | Purchase incentives regulate EV uptake; sales increased significantly throughout the quarter, as the Danish tax on EVs increases to 40% in 2017. Tesla sales vanishingly small.

- B-, C- and PHEV segments are driving Danish EV sales.
- B-segment gains ground, as Renault Zoe sales explode.
- Tesla sales on the verge of crisis; sales dropped with 97% compared to Q4 2015.

The sales figures are divided into segments (numbers above and percentages below).

- Renault Zoe dominating the market; B-segment increased its market share from 29% to 32%, as car sharing companies purchase numerous Renault Zoe.
- BMW i3 and Nissan leaf are popular; C-segment increases its market share from 16 to 17%.
- Tesla Cannibalization continues - Model X stealing sales from Model S.
- PHEVs are very popular; outcompete the B-segment despite its unfair advantage.

If you are interested in a more detailed analysis, get in touch with us here.
Norway sets another record; C- and PHEV-segments continue to flourish with Hyundai Ionic successfully penetrating the Norwegian EV market. Cannibalization among Tesla Models continues.

- Norway raises the bar once again; For the fifth consecutive quarter, Norway breaks the 11,000 hallmark and sets a new best selling record.
- However, the Norwegian EV market seems to be stabilizing, as sales growth decreased significantly in 2016.
- Ins ero expects Norwegian EV sales to be between 10,500 and 13,000 in the coming quarters.

If you are interested in a more detailed analysis, get in touch with us [here](#)
Swedish EVs: Sweden breaks its sales record with PHEVs dominating the market. Tesla cannibalization seems not to be evident on the Swedish EV market.

- Sweden breaks its record; sales up 59% compared to 2015.
- Sweden remains a PHEV country. Despite efforts to incentivize uptake, the market seems not ready to fully adopt BEVs.

The sales figures are divided into segments (numbers above and percentages below):

- PHEVs stole the show in 2016; almost 4 of 5 new vehicles being a PHEV.
- The E-segment and Tesla Model S saw stable sales despite the introduction of Model X.
- Smaller BEV segments struggle on the Swedish market.
- The Swedish market welcomed Tesla Model X; Sells 288 vehicles despite being available for only a limited time in 2016.

If you are interested in a more detailed analysis, get in touch with us here.
Finland | PHEVs breaking records for Finland. BEVs with limited range are unlikely to be diffused with the current charging infrastructure network. Tesla expecting to penetrate the Finnish market?

- Upgrading charging network.

Best growth rate in the Nordic Region. EV sales grew with 120% in 2016.

- PHEVs dominate; account for 85% of sales in Q4.

- Driving range seems to be an important issue in Finland; vehicles with long range account for 94% of sales in Q4.

- PHEVs stole the show in 2016 with 84% of new registrations being a PHEV.

- Tesla expecting increased sales in Finland – gearing up for a new phase.

- Small vehicle classes with limited range are incompatible with Finnish market; A- and b-segment sales are dead, while C-segment sales drop.

If you are interested in a more detailed analysis, get in touch with us here.
Nordic PHEV sales are exploding; now the preferred drivetrain in the Nordic region. Number of car models available positively related to EV sales. Large car models dominate the PHEV segment.

- PHEVs more popular than ever before; PHEV sales had another winning quarter with a considerable sales increase.
- The PHEV segment has a wealth of popular cars; the Outlander, Passat GTE and Golf GTE break the 1,000 hallmark
- The PHEV is the optimal vehicle for the current state of the EV market.
- The PHEV segment is dominated by large car models such as the Passat GTE and Mitsubishi Outlander.

If you are interested in a more detailed analysis, get in touch with us [here](#).
Tesla sales cut in half; E-segment sales plummet, as cannibalization with J-segment continues, and Danish Tesla sales vanish. The C-segment bounces back, as new car introductions lead to increased sales.

- BMW i3 sales grow rapidly while the new Hyundai Ionic gains popularity; C-segment bounces back.
- Vehicle introductions increase sales; the new improved BMW i3 and Hyundai Ionic saw significant sales in Q4.
- Driving range remains an important issue; Q4 saw customers join the C- and PHEV-segments at the expense of the A- and B-segments.

The sales figures are divided into segments (numbers above and percentages below).

**E- and J-segment sales Q4 2016**

- Tesla sales is cut in half, while customers await the Model 3.
- Registration tax exemption is an imperative for EV sales; The massive frontloading of sales in 2015 and introduction of a progressive taxation scheme kills EV uptake in Denmark.
- Tesla cannibalization continues, J-segment is stealing sales from the E-segment, and vice versa.

If you are interested in a more detailed analysis, get in touch with us here.
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</tbody>
</table>
Nordic | Tesla improves charging infrastructure in Finland with the addition of several new fast chargers. Otherwise the Nordic Region saw no significant improvements to their charging infrastructure.

Q4 highlights

- Denmark:
  - 55 new plugs added
- Norway:
  - 89 new plugs added
- Sweden:
  - 129 new plugs added
- Finland:
  - Tesla adds new fast chargers

If you are interested in a more detailed analysis, get in touch with us [here](#).

Note: No completely accurate numbers exist for the charging infrastructure figures, however, Insero has been able to find improved sources including EAFO.eu for the production of the statistics. Insero has no accurate overview of all the types of plugs, which is why they are all filed under “other”.
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### Overview of incentives

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<th>Financial incentives</th>
<th>Convenience incentives</th>
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<td><strong>Norway</strong></td>
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<td><strong>Sweden</strong></td>
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<tr>
<td><strong>Finland</strong></td>
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### Specific incentives

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<th>Tax incentives</th>
<th>Financial incentives</th>
<th>Convenience incentives</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Denmark</strong></td>
<td>80% reduction in registration tax</td>
<td>Tax reduction (0,13 EUR per kWh) for businesses, EV subsidies for business and municipalities.</td>
<td>Reserved parking spaces for EVs, Differentiated prices</td>
</tr>
<tr>
<td><strong>Norway</strong></td>
<td>Registration tax exemption, VAT exemption, Road tax exemption, Reduced company car tax (50%), Exemption from VAT (25%) on leasing</td>
<td>Toll road exemption, Free public charging, Higher mileage allowance, No charges on ferries</td>
<td>Bus lane driving, Reserved parking spaces, Fast charging station every 50 km on all main roads by 2017</td>
</tr>
<tr>
<td><strong>Sweden</strong></td>
<td>Vehicle tax exemption for 5 years*, Company tax benefits</td>
<td>Super Green Car Rebate.</td>
<td>None</td>
</tr>
<tr>
<td><strong>Finland</strong></td>
<td>Registration tax reduction (BEV buyer pays 2,5%), Ownership tax benefits</td>
<td>Cheaper parking/ Free parking</td>
<td>None</td>
</tr>
</tbody>
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*all Euro 5 or 6 level emission vehicles

**a subsidy of 35% of the price difference between a low-emission vehicle and a comparable conventional vehicle
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“Autonomous vehicles are the future, and the future is near”
In this theme section, we provide you with the latest insights from the Consumer Technology Association conference (CES 17) regarding autonomous vehicles.

The future of car technology is evolving rapidly. Electric vehicles and laser scanning systems, which were presented as groundbreaking technologies at the CES conference a few years ago, are now a common sight in the daily traffic. This year a well-known upcoming player, which started its journey back in 2015, has appeared on stage delivering a clear message: Autonomous cars are the future, and the future is near.

Autonomous driving is no longer a Silicon Valley subject and “The Consumer Electronics Show” (CES 17) showed what we can expect in the upcoming future. For instance, major OEM’s including Ford, Toyota, Nissan, Audi, Google and more or less everybody with an interest in the industry are introducing new and improved concept cars. Even mobility-as-a-service companies such as Uber and Lyft are now showing interest through the Self-Driving UberX, points safety as their main reason for why they are moving towards autonomous driving.

Exciting concept car introductions that will push the technological envelope are currently being presented. Honda, for instance, introduced their NeuV car that will be able to address traffic safety, congestion, etc. through V2V communication. Moreover, Rinspeed introduced the Oasis together with their partner Harman International. The Oasis car discusses the question of what travelers will do when self-driving has become the DNA of the car. Not only does the cabin have a television, but also a miniature garden.

Autonomous driving seems to pave the way for unprecedented business models, and hence, contributes to the continuous innovation within the mobility industry.

The biggest paradigm shift in automotive history is upon us as technology is taking over. A new situation has appeared with the introduction of advanced driver assistance systems. OEMs such as Volvo are currently developing services and apps that will make it possible to work while traveling by car with the introduction of Microsoft’s Skype for Business in the S90 sedans and XC90 SUVs. Artificial intelligence is another aspect that is going to present speech recognition in order to understand the driver’s context when giving commands for navigation, choice of music, etc.
Subcontractors push the boundaries, as Delphi introduced their new and highly advanced self-driving technology that will raise the bar for future standards. As an alternative to shutting down when encountering unidentified obstacles, like previous prototypes, the Delphi technology establishes rules making decisions similar to that of human reaction. The result is flawless lane shifts in various conditions combined with improved breaking, acceleration, and steering predictions. Additionally, Delphi has announced their new partnership with Mobileye. This cooperation has led to demonstrations of how autonomous vehicles handle tunnels and other situations when GPS signals are lost.

An additional, yet important subject at CES 17 regarding the future of technology within autonomous cars is the use of face recognition. Monitored cameras will be able to recognize the owner and unlock the doors of concept cars such as the Chrysler Portal, which has the software system installed. In a similar vein, Bosch has introduced facial recognition software that automatically adjusts the majority of driving settings such as mirrors and steering wheel according to the driver’s preferences.

The future for autonomous vehicles is near, but when will it be widely diffused? Three of the major OEM’s counting GM, BMW, and Ford target 2021 or even earlier as a deadline for when they will introduce their first self-driving vehicles, while Hyundai believes it will be ready by 2020.
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During the compilation of Insero Quarterly, we have used the various sources listed below. Thanks!
For more information, feel free to contact us today.

SALES STATISTICS:
- BIL Sweden
- Oplysningsrådet for Veitrafikken AS
- TRAFI – Liikenteen Turvallisuusvirasto
- De Danske Bilimportører

CHARGING INFRASTRUCTURE AND EV INCENTIVES:
- E.ON Denmark, Clever, CleanCharge
- NOBIL
- PowerCircle
- HELEN
- Statens vegvesen Norway
- Skatteverket Sweden
- Transportstyrelsen Sweden
- Energistyrelsen Denmark
- TRAFI Liikenteen Turvallisuusvirasto

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If you are interested in a more detailed analysis, get in touch with:

JENS CHRISTIAN MORELL LODBERG HØJ
Team Lead, E-Mobility

Phone: + 45 4112 5558
E-mail: jc1h@insero.com
INTRODUCTION TO INSERO QUARTERLY

What is Insero Quarterly?
A quarterly publication visually presenting and analysing:
• Nordic electric vehicle (EV) and plug-in hybrid electric vehicle (PHEV) sales on a quarterly basis, including Denmark, Norway, Sweden and Finland.
• Overview of the charging infrastructure roll-out in the individual countries.
• Status on the national EV incentives.
• Cross-border price comparisons on specific EV models and conventional cars in several car segments, including vans.
• Theme section on relevant E-mobility related topics. This time it is a political status on banning fossil-fueled cars.

Who is Insero Quarterly for?
Insero Quarterly looks at the Nordic EV and PHEV market at a glance. If you need further information or market analysis, don’t hesitate to ask us. Our insight in the Nordic market is unparalleled. Here are some examples of what we can do:
• Analyse the market potential for specific vehicles or types of vehicles
• Derive data on customer preferences
• Go-to-Market strategies for small to medium sized vehicle manufacturers
• Analyse incentives and causality, and how it will influence your business
• Industry mapping and technology reports
• Strategic transport planning / economic and emission analysis
• Component reports
• V2X technology and business case analysis.

Why is Insero Quarterly relevant for my business?
Insero Quarterly provides an unprecedented and continuously updated overview of the Nordic e-mobility market situation, which in turn leads to:
• Concrete market data to form a basis for a strategic / product decision
• Cohesive market insights
• A common work of reference for the industry across the Nordic countries

Behind Insero Quarterly
Insero offers new solutions, projects and education within energy and ICT. We are leading experts on intelligent software, energy and e-mobility. We offer a variety of consultancy services ranging from operational consultancy to strategic analyses and complete business strategies within e-mobility.

Smart Grid and V2X
This area is a core competence for Insero. We have worked extensively in R&D projects, living labs and consulting within this field for several years and use our knowledge and insights to help the energy sector, OEMs and SME vehicle manufacturers understand the business case and exploiting it.

Mobility and strategy
E-Mobility is starting to penetrate several mobility markets along with other alternative fuels which will structurally change the way mobility works. We specialise in analysing mobility patterns and identifying sweet spots where new fuel types can contribute greatly to a mobility solution that is better integrated.

NEXT EDITION
The next edition of Insero Quarterly (Q4 2016) will be out in mid January 2017.

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