



Electric Vehicles in the UAE:

Challenges and Opportunities

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**Future Mobility Club
Clean Energy Business Council MENA
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Executive Summary

The number of Electric Vehicles (EVs) on the UAE's roads is increasing every year. Sustainable transport and EVs are central to tackling several Sustainable Development Goals (SDGs), including SDG 3 (Good health and well-being), SDG 7 (Affordable and clean energy), SDG 11 (Sustainable Cities and Communities) and SDG 13 (Climate Action).

The adoption of EVs could potentially “increase the share of renewables in the global energy mix indirectly (target 7.2), and contribute to reducing air pollution and related health impacts (target 3.9)” (IISD, 2017). Transportation accounts for around one-fourth of global CO₂ emissions, most of which comes from passenger vehicles (Ritchie, 2020). Reducing emissions from transportation can provide health benefits through improving air quality.

The UAE government is committed to encouraging more sustainable modes of transport. This is evidenced by investments in public transportation and EV infrastructure across the Emirates. Dubai in particular, aims to ‘become the city with the lowest carbon footprint in the world by 2050’, in which sustainable transportation will play a big part (DEWA, 2020). One aspect of this is the Dubai Green Mobility Initiative, which aims to increase the government procurement of hybrid vehicles and EVs in Dubai.

To support the UAE's sustainable mobility transition, the Clean Energy Business Council (CEBC) established a working group named the Future Mobility Club (FMC) in early 2019. The FMC aims to support the development and transition to a green and smart mobility sector and promote the adoption of EVs in the UAE and the wider Middle East and North Africa (MENA) region. The programs under the FMC consist of activities that aim to raise awareness on all levels about EV development by collaborating with relevant stakeholders, both from the private and public sectors.

This year, we present this white paper titled Electric Vehicles in the UAE: Challenges and Opportunities that focuses on analyzing the current gap in the development of EVs across the UAE. This white paper provides recommendations for policymakers in the UAE and around the region and a comprehensive overview of the EV market in the UAE, covering the current policy landscape, infrastructure, challenges hindering the growth of the market and the opportunities for businesses.

The paper mainly analyses the UAE market, but many of the learnings could be extended to the rest of the MENA countries. This paper could be considered as a handbook for policy makers, EV manufacturers, EV charging operators, insurance companies, banks and other stakeholders to understand the current market landscape and perceptions.

Acknowledgments

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Introduction

Transportation contributes significantly to the global green-house gas (GHG) emissions, accounting for over 24% of global CO₂ emissions (IEA, 2018). In the UAE, transportation accounts for around 20% of emissions (IEA, 2018).

vehicles (HEVs) and fuel-cell electric vehicles (FCEVs), have been made commercially available for companies and individuals. The promotion of these new energy vehicles will result in a significant drop in GHG emissions and

Global emissions by sector (Mt CO₂) (IEA, 2018)

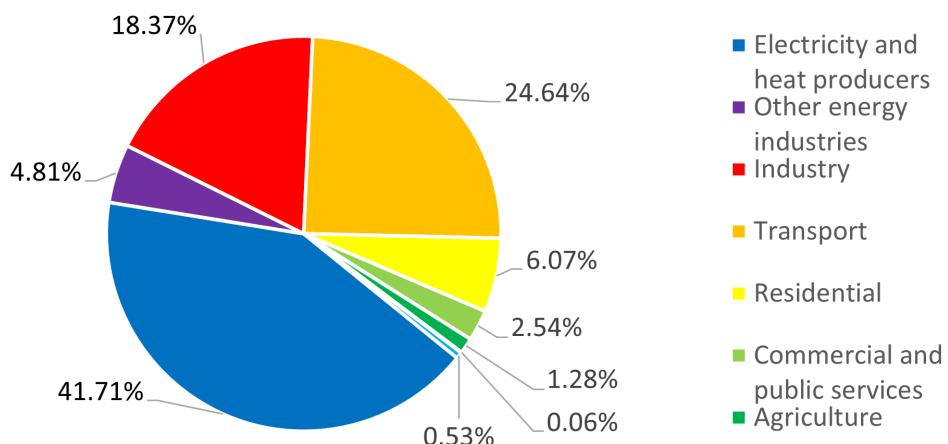


Figure 1 : IEA, 2018

In the next 30 years, transportation is predicted to grow faster than other sectors. Thus, transportation will continue to be a contributor to the emissions and air quality levels all over the world. Shifting towards sustainable modes of transport has to become a priority for all governments. Low emission vehicles play an important role in this transition to a sustainable mobility sector. Recently many new energy vehicles, including battery electric vehicles (BEVs), hybrid electric

consequently, an improvement in air quality and well-being (Patel, 2019). However, increasing the number of these vehicles on the road will not reduce global emissions of its own accord; it is crucial that the power generation fuel source for charging EVs is from low-carbon sources (IRENA, 2020). Further integration of renewable energy in power generation, particularly through solar and wind, is a necessity (IRENA, 2019).

Middle East Energy Consumption by sector (IEA, 2018)

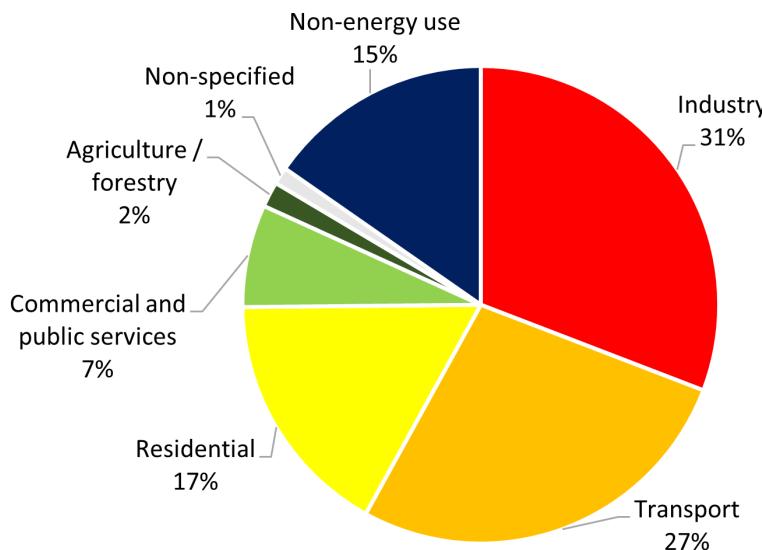


Figure 2 : IEA, 2018

Transport relies heavily on petrol and other liquid fuels (such as natural gas plant liquids and biofuels), while the use of electricity in the sector remains minor (IRENA, 2016). To achieve the Paris Agreement's goal of limiting global temperature increase below 2 degrees Celsius, it is important to shift fossil fuel needs in transportation to renewable and efficient energy sources.

Electrification is considered a vital part in reducing emissions in the transport sector.

Electrification of transportation can significantly reduce emissions. Over their lifetime, EVs contribute to considerably lower emissions than conventional internal combustion engine vehicles (ICEs) (Hausfather, 2019). Most of the emissions come from the production stage, as electricity

is used to produce the vehicle and most importantly, the battery (Hausfather, 2019). As countries decarbonize electricity generation, the emissions of EVs will be further reduced. The expansion of renewables such as solar in countries such as the UAE, can reduce the cost of production of electricity drastically, to almost zero 'in periods of high solar output' (Gupta, 2020). Roughly 15% of gCO₂ Eq./km is from battery production (Transport & Environment, April 2020). However, the location of battery production and the energy mix in each country has to be considered for exact emissions. Considering grid decarbonization, battery second life, battery recycling and battery technology improvements, EVs account for lower carbon emissions over their lifetime (ICCT Report on EV Battery Manufacturing, 2018).

BEVs emit no tailpipe emissions and potentially have very low fuel-production emissions (IPCC, 2018). In terms of the proportion of total transport energy consumption by fuel source, BEV's usage also shows an improvement between 2000-2015 (WRI, 2019).

The adoption of EVs nationwide in China resulted in a significant reduction in pollution as well as lower nitrogen dioxide levels and ozone levels; which in addition to carbon dioxide are detrimental to health. Electrification had more of an impact in highly populated cities like Beijing, Shanghai and Guangzhou (Patel, 2019). As such, the health factor plays an increasingly important role in developing incentives for the further adoption of EVs and policymaking.

Particularly as a result of COVID-19, public health is at the forefront of governmental discourse and the electrification of the transport sector is a vital piece of the puzzle.

“ Transition to EVs is inevitable to reduce transport related emissions and thereby improve the air quality and public health in cities ”

There are still barriers to entry for EVs, such as a lack of awareness about the total cost of owning an EV, the price of initial purchase and the availability of infrastructure. Most countries globally do not have sufficient infrastructure to support a green mobility economy and it remains inaccessible for most to purchase an EV.

However, the growth of the EV market has been exponential. In 2010 there were around 17,000 EVs worldwide, while as of the end of 2020 there are over 10 million EVs (IEA, 2020; EV Volumes, 2021). Governments worldwide have also introduced incentives such as lowering tax on EV purchases and improving infrastructure. The Middle East accounts for a minority of the global EV market, but the development and encouragement witnessed in the UAE can be replicated in other countries in the region.



Scope and Objectives

Current trends in the UAE demonstrate a high demand for a transition towards EVs in the region. Several studies have analyzed the environmental impact of EV development in the UAE (e.g. Kiani, 2017) and societal challenges that focus on private vehicles (e.g., Bekiaris et al., 2017). However, there is a lack of studies analyzing the challenges that private companies and business sectors face regarding fleet electrification. There is also still some lack of public knowledge about the EV infrastructure capacities in the UAE.

CEBC, under its FMC, performed a market survey to get more insight into the current challenges facing EV development while exploring potential opportunities in the UAE. The study was divided into three stages: data collection, data analysis, and report writing. The data collection stage took three months (July - September 2020) and was conducted online through SurveyMonkey. The responses of this survey come from 225 companies in the UAE. The survey results outlined that there are some gaps with regards to EVs in the UAE and therefore, this study aims to:

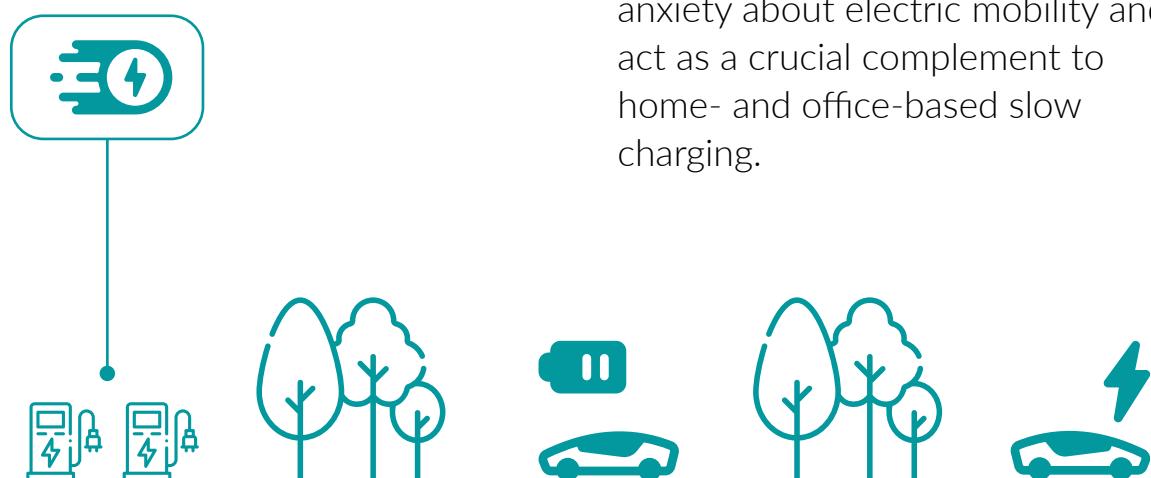
- a) Provide an overview of the current status of the EV market in the UAE,
- b) Outline the challenges and opportunities for the EV market in the UAE,
- c) Provide policy recommendations to improve the deployment of EVs, especially through the potential fleet electrification market, in the UAE.



Landscape of the EV Market in the UAE

EV Infrastructure Overview

With the very first models of Tesla Model S, Renault Zoe and Chevrolet Bolt making their way into the UAE in 2017, the EV market in UAE has certainly progressed over the last three years and is the leading early adopter of EVs in the MENA region. The UAE government has stepped up its efforts and have implemented an incentive scheme to support the demand side and on the other hand has increased the public charging stations to around 240 now, on the supply side. This effort of installing charging stations makes the ratio of the number of EVs to the number of public charging stations one of the highest in the world. However, the distribution of those 240 charging stations is highly uneven with around 80% of them in Dubai and the rest of the emirates covering the other 20%.



The types of chargers available are:

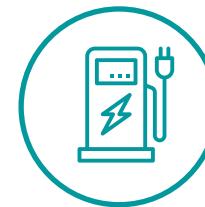
- 1) **Slow chargers** – typically up to 22 kilowatts (kW) – are used mostly for home and office charging. With slow charging the EV battery is connected to the grid for longer periods of time, increasing the possibility of providing flexibility services to the power system. This encompasses the majority of charging stations in the UAE.
- 2) **Fast chargers** – typically 50 kW and up – are likely to be used in direct current (DC) systems, often along highways. This encompasses the minority of charging stations in the UAE, mostly available at gas stations.
- 3) **Ultra-fast chargers** – above 150 kW – help to overcome customer anxiety about electric mobility and act as a crucial complement to home- and office-based slow charging.

While the public charging stations are installed and operated by Dubai Electricity and Water Authority (DEWA), Sharjah Water and Electricity Authority (SEWA), Abu Dhabi Water and Electricity Authority (ADEWA) and Federal Electricity and Water Authority (FEWA) and municipal entities in other emirates, private home charging solutions are being provided by both public and private sector players. Destination charging is provided by private players like Tesla, GreenParking, CATEC Mobility, Volt, Schneider Electric, Siemens, ABB and others in public places such as malls, hotels, parks, resorts, etc. By the end of 2018 the number of charging stations was over five hundred. Considering the rate of uptake and the UAE government's vision, it can be estimated that there are around more than 600 destination chargers by the end of 2020 in the UAE. As part of the UAE's EV Green Charger initiative, an individual can get a Green Charger card by registering on the DEWA platform, through which non-commercial users can charge their EVs for free, until the end of 2021. Emirates Authority for Standardization and Metrology (ESMA) issues conformity certificates for charge point operators with respect to the health and safety standards prevalent in the UAE.

Dubai has introduced the following incentives to encourage the uptake of EVs:

- Charging is free in public charging stations in Dubai until the end of 2021
- Free parking at RTA parking spaces
- Free vehicle registration
- Owners of EVs exempt from SALIK toll fees

Other Emirates are starting to make efforts to provide incentives, such as through providing charging for free for customers in hotels and shopping malls in Abu Dhabi and the Northern Emirates. A clear policy landscape is still needed in the other Emirates to encourage EV adoption.



EV Adoption

Despite the challenging times for the automotive industry worldwide and in UAE as well due to the pandemic and the continued decreasing trend in 2019, 2020 has been the year for EVs in UAE as well seeing a year over year increase of around 60% from 2019 figures. The below figure shows the Dubai registered EVs.

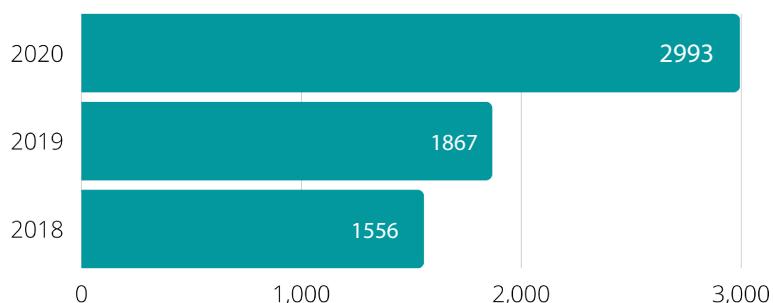


Figure 3 : EV Registration Figure

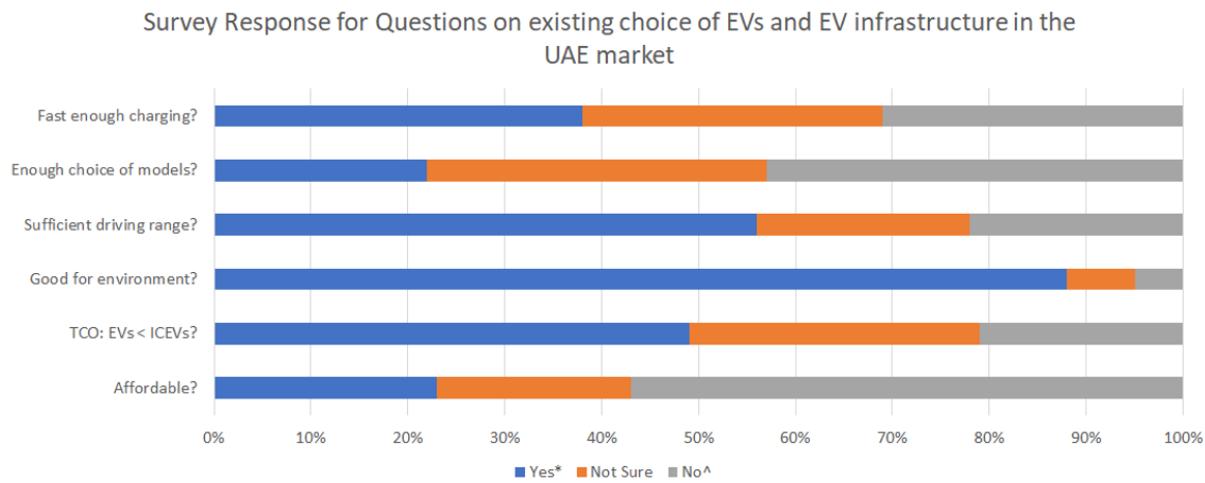
To summarize, the UAE has a solid foundation setup for the transition to cleaner vehicles. This transport transformation is only meaningful and possible if combined with an energy transformation. With the vision of 44% of UAE's energy generated from clean energy sources by 2050 (UAE National Energy Plan 2050), the UAE is well positioned for a transportation sector transition along with the energy sector. While the infrastructure seems to have taken a leap considering the ramping up of suppliers and the infrastructure supply in the country, much still remains to be done on the demand side.

Manufacturer	Model	Range
Tesla	Model S	639 - 840 km
Tesla	Model X	548 - 561 km
Tesla	Model 3	430 - 580 km
Chevrolet	Bolt EV	459 - 520 km
MG	ZS EV	263 km
Renault	Zoe	50 - 395 km
Jaguar Land Rover	I-Pace	470 km
Porsche	Taycan	390 km
BMW	i3	190 - 300 km

Figure 4 : Available EV models in the UAE

Challenges & Opportunities

Despite the potential offered by having more EVs on the road, there are also many challenges. Based on the survey that we conducted, some misconceptions emerge on the topics of the financial aspect of owning an EV, the capabilities of EVs, and EV infrastructure.



Note: * - Answers "Definitely agree" & "Mostly agree" are considered as yes

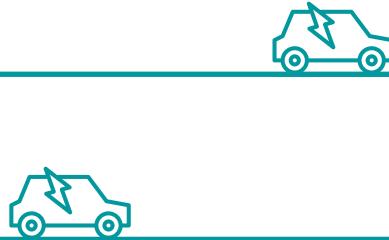
^ - Answers "Definitely disagree" & "mostly disagree" are considered as no

Cost of ownership

One of the major issues is related to the financial aspect. Many still perceive EVs as not affordable, especially in terms of the purchase price. This perception was clear in the survey results, in which the majority of the respondents still perceived that the current price tags on EVs do not match expectations. It could also be seen earlier that the price of EVs in the market is slightly higher than ICE vehicles.



Most end-users understand the benefits of EVs from the ownership point of view – thanks to lower maintenance costs and much cheaper operating costs per km of driving than ICE vehicles. For example, the price of a Tesla Model 3 costs more than \$45,000 (Tesla, 2020).



It could be seen that some companies in the UAE already realise that EV ownership costs less than ICE vehicles for long-term usage. Some issues may still remain around the availability of spare parts in the UAE region, which may also be a problem for potential EV users. On the other hand, EVs need less maintenance than ICE vehicles due to the drastic reduction in the number of moving parts. This is already understood by many companies. Some regular maintenance, such as frequent oil changes, filter replacements, and periodic tune-ups, could be avoided by owning EVs.

Driving range

Another issue is related to the limited capacity of EVs. Based on the survey, the results show that there is still a lack of awareness regarding this issue. Companies that use EVs in their internal fleet mostly understand the actual EVs and normal charging scenario capabilities. This perception has been a long-term discussion on EV development. Many automotive companies also realized this issue, and the research on EV batteries has increased significantly. By having a bigger battery size and more efficient technology, new models of EVs now already have a longer driving range. Most of the 2019 EVs have a driving range of up to 300 km, which can take you across the UAE (Kokkinos and Fotopoulos, 2019).





Charging speed and the availability of charging points

Even though most companies with a plan to initiate the shift towards EVs already think that the current available charging speed is sufficient to their business' needs, there is still a lack of awareness regarding EV charging speed. In line with the technology development on battery capacities, a similar development has occurred with charging speed. The survey showed there is a lack of awareness about the charging speed and the availability of charging stations.

Currently, the time needed to charge EVs ranges from as little as 30 minutes to 12 hours, depending on the charging type. For public charging points, fast and rapid charging infrastructure is more desirable because it could charge the vehicle in a shorter time. The lack of sufficient charging infrastructure remains a barrier to fulfilling business needs. EV fast chargers located in gas stations can usually charge an EV to full in just around 30 minutes (Kokkinos and Fotopoulos, 2019). Another doubt is related to the existing EV charging infrastructure in the UAE; the results show that most users are not aware of EV infrastructure availability in the UAE.

DEWA tried to tackle this issue by installing 240 EV charging points throughout Dubai by the end of 2020 (DEWA, 2019). DEWA is continuously adding more charging points in the city to attract more EV users to fulfil the Smart Dubai initiative.

Despite the lack of awareness, it could also be seen that EVs still have great potential in the UAE. The survey results stated that around 68% of company representatives would consider EVs when making changes to their internal fleet. This shows great potential for the EV market in the UAE. Most respondents stated that their companies have an internal fleet deployed to support their business activities. Most of them chose light passenger vehicles and SUVs compared to other vehicles, for instance, passenger vans or heavy-duty vehicles. This strengthens the potential for companies using EVs in their internal fleets since the current models available in the UAE market are light passenger vehicles.

An interesting finding from the survey was regarding charging points in the region; many companies showed an interest in installing EV charging infrastructure intended for company use, and also make this accessible for public use. This could be an added value to the current EV infrastructure landscape in the UAE. Putting a tariff on accessing the companies' charging stations can also benefit the companies' business strategies.



Conclusion

Great advances have been made in the UAE in the past few years in terms of EV infrastructure development, an increase in the models available and a greater willingness from consumers and businesses to shift from conventional ICE vehicles to EVs. However, consumer perception and lack of awareness also remain a barrier to this transition, as indicated by the survey results.

From the results, it could be seen that most of the respondents do not have plans to initiate changes to their internal fleet in the next year. These companies have shown an interest in buying EVs for their internal fleet if their desired model is available on the market. The price, the availability of the current models, and the existing EV charging infrastructure that is available are the main aspects that affect their decision.

“

Companies are willing to install charging stations for EVs in their fleet as well as for the use of public for a price

”

“ *68% of business owners showed interest in electrifying their internal fleet during their next round of purchases beyond 2021*

”

The existing EV infrastructure is not perceived as sufficient. Many companies may install their own charging stations to tackle this issue. Furthermore, most companies plan to make their charging stations available for public use, in addition to being used for internal needs. This effort by the private sector could support the UAE in strengthening its EV infrastructure.

While new models are coming to the market and prices are going down with time, compared to previous years, we can still see that one of the barriers to entry is the purchase price of EVs, which are set to change in the near future with economies of scale and advances in battery technologies. Another area that needs more efforts is in raising awareness among the public about EVs and available infrastructure.

Recommendations for Policymakers

The survey provides an overview of companies' reluctance in the public and private sectors to commit to EV procurement at this stage.

However, some things are not taken into consideration to support EV development. One example is related to the small number of vehicle types available in the market. Currently, only small passenger vehicles are available for fleets. The high upfront costs and a lack of diverse product offers makes the EV competition in the market still considerably low.

Another issue is related to the incentives provided by the government. Currently, there is no "fiscal incentive" to make a substantial shift to EVs for both consumers and companies. Regarding the available EV infrastructure, the number of charging stations have increased but not at a level where it is sufficient to support a developing market. Furthermore, the general public has little understanding of EVs. Policymakers play an important role in implementing policies and strategies to support EVs. This would provide more transportation options and attract more people to adopt EVs.

Bearing this in mind, policymakers need to consider the following recommendations in five key areas, which may well assist in kick-starting the transition.



Provide incentives for the price of EVs, especially for the company usage. Governments could offer a fiscal subsidy to support EVs. In other parts of the world this is generally achieved through taxation to offset the cost and provide the subsidy. With no taxation in the region, this is a challenging situation. However, it is an area that should be studied closely with the OEMs. This effort needs to be followed by expanding the prospective buyers' and owners' knowledge about the long-term economic benefit if they are shifting to EVs from ICE vehicles. Hence, the financial calculation would be more than just the initial purchase price of an EV. New funding channel also to be established, such as penalizing polluting vehicles to use the money collected to install more EV chargers or waive import tariffs for EVs by incentivizing OEMs who brings in EVs to the market



Expand the current EV models. As many companies mentioned that they were interested in shifting their internal fleets to EVs, it would be beneficial if more models of EVs were added to the market, especially commercial vehicles.



Add more EV infrastructure. Expanding EV infrastructure increases the visibility of the progress of the EV market.



Improve collaboration between public and private sectors in providing more EV charging stations. The majority of charging points are owned and operated by government entities. The private sector could provide more charging infrastructure in the region, which could be used both for internal and public usage. This effort could increase public interest to transition to EVs in the future.



Improve general knowledge regarding electric vehicles. Government departments need to work with vehicle manufacturers and charging station suppliers to educate the public about EVs. Awareness is the key for people to consider different alternatives. EXPO 2020 will be a platform to raise the awareness of future mobility; however, in the meantime, policymakers should look to work with the private sector to initiate learning and education.



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Electric Vehicle Chargers for Commercial Communities!

3 key challenges that property developers and facility managers have when introducing an EV infrastructure into their commercial communities:

-  Increasing Demand for Electric Vehicle Chargers by Residents
-  Lack of Power Capacity
-  Government Regulations for Green Parking Spaces

Our Solution

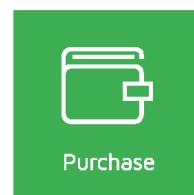
We help take the pressure off, making the **installation and management** of these chargers as **easy** as possible for you and your residents. We'll set you up with the highest quality **smart EV chargers**, provide **back office services, payment solutions, a 24/7 support hotline** for your residents, and much more!

You will be provided with everything you need to **manage access, consumption and billing** for your residents - helping provide a **healthy ROI**.



Our Offer

We offer the following 2 Business Models:



Get in touch with us

To find out more about how we can help you build a powerful seamless EV infrastructure in your commercial community, head to www.greenparking.ae/ev-charging

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Smart Mobility Solutions

Intelligent Fast Charging Solutions for Electric Vehicles and Plug-in Hybrids

Energy for transportation can be evolved with the latest technologies. MENA Mobility provides a comprehensive portfolio of solutions enabling customers to transition to renewables using smart technologies. We offer the below EV infrastructure & equipment:

EV Charging Infrastructure (EVCI)

- **eBus depot & en-route charging**
Electric bus pantograph solution equipped with roof-mounted charging ports.
- **Commercial/industrial fleet charging management**
Intelligent asset management and optimisation through high-powered charging grid.
- **Roadside fast-charging stations**
Public EV infrastructure for public transportation & passenger vehicles.
- **Public & commercial car park charging stations**
Public EV infrastructure for vehicle parking spaces.
- **Destination charging**
EV infrastructure for workplaces, hotels & apartment blocks.
- **Single-home residential chargers**
Home charging stations for personal vehicles.



AI Naboodah Smart Cities

MENA Mobility is a division of AI Naboodah Smart Cities, a company founded on innovation which provides a comprehensive portfolio of solutions to customers wanting to transition into green buildings and net-zero energy applications through smart technologies and renewable energy.

- Smart Buildings
- Smart Mobility
- Automation
- Renewable Energy



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