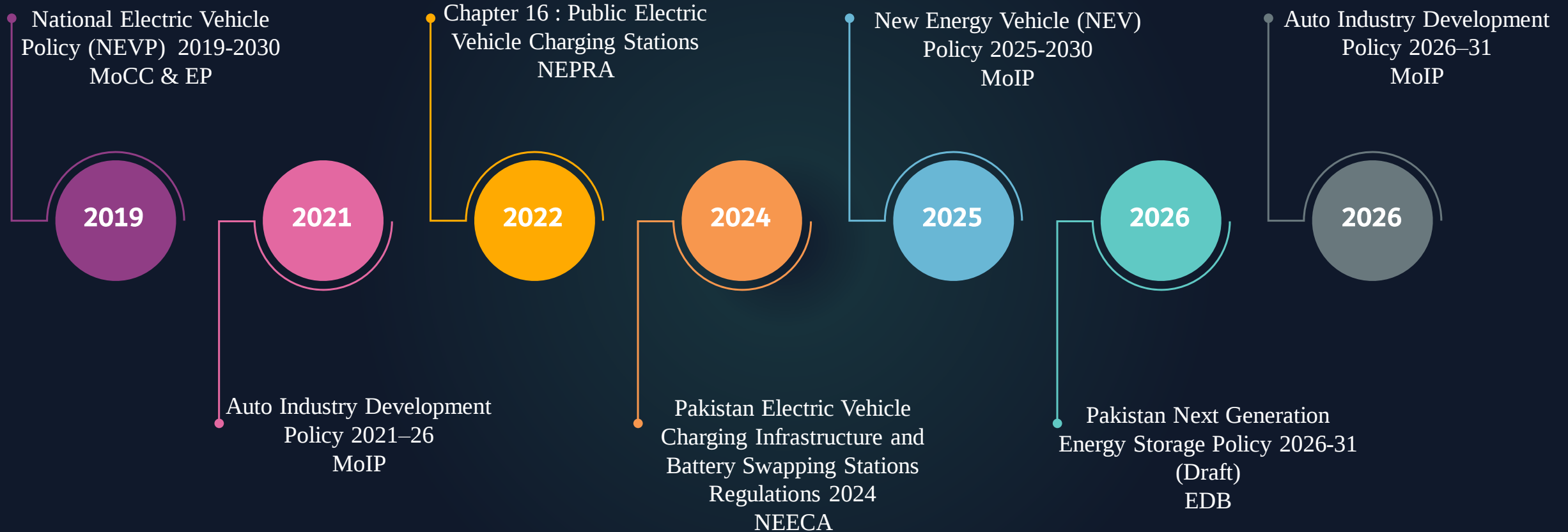


PRESENTATION OUTLINE

An Overview Timelines	Pakistan EV Policy and Regulations
NEVP Policy 2019 NEV Policy 2025	Pakistan Electric Vehicle Policies
EVCS & BSS Regulations 2024	Pakistan Electric Vehicle Regulations
Policy & regulation implementation EV Eco System	Status of EV Technology in Pakistan
	Q & A Session



Pakistan EV Policies and Regulations : Timelines





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PAKISTAN EV POLICIES



National Electric Vehicle Policy (NEVP) 2019-2030

Penetration Targets

- 30% target for new sales in cars & trucks by 2030 (90% by 2040).
- 50% target for 2/3-wheelers & buses by 2030 (90% by 2040).
- Focus on high-volume 2/3 wheelers for rapid fuel bill substitution.

Fiscal Incentives

- 1% Sales Tax on local EV sales (vs 17% conventional).
- 0% Sales Tax & 1% Customs Duty on EV-specific part imports.
- Exemption from Federal Excise Duty (FED) & Additional Custom Duty and Additional Sale Tax.

Infrastructure & Grid

- Conversion of legacy CNG stations into EV fast-charging hubs.
- Recognized need of Special EV charging tariffs and Charging infrastructure
- Targeted highway charging points along CPEC & motorway routes.

National Electric Vehicle Policy (NEVP) 2019-2030 (1/2)



(80,000) EVS get registered
by June 2025



License issued
(65 Manufacturers)



License issued
(2 Manufacturer)



NEPRA A2(d) tariff category
i.e. PKR 95/KWh(Approx)

National Electric Vehicle Policy (NEVP) 2019-2030 (2/2)



(80,000) EVS get registered
by June 2025



License issued
(65 Manufacturers)



License issued
(2 Manufacturer)



NEPRA A2(d) tariff category
i.e. PKR 95/KWh(Approx)

Adoption of electric vehicles picked up marginally with the promulgation of the NEVP policy along with AIDEP 2021-2026 however, due to various reasons the policy fell short of its target which includes;

- COVID-19 pandemic
- Implementation challenges
- Lac of Implementation framework

Pakistan EV Policy Paradigm Shift: 2019 vs 2025–2030



POLICY DIMENSION		NEVP 2019	NEV 2025
	Policy Scope & Vision	Standalone EV Policy	Integrated NEV Ecosystem Policy
	Adoption Targets	30% Long-term aspirational Goal by 2030	30% Long-term + Binding Annual Targets
	Systemic Integration	Focus on Vehicle Adoption & Sales	Vehicles-Charging Hubs-Power Grid-Tariff
	Manufacturing Strategy	Reliance on Imported & Assembled CBU/CKD EVs	Aggressive Local Manufacturing – Battery Localization
	Incentive Structure	Basic Tax Relief & Duty Concessions	Direct Subsidies-Cost Sharing-Govt Fleet Mandate
	Charging Role	Charging as a Supporting Infrastructure Item	Charging Network as a core Policy Pillar
	Governance Model	Fragmented Inter-Agency Execution	Institutional Coordination Via Action Plan

New Energy Vehicles Policy (NEV) (2025-2030)



Macroeconomic & Environmental Impact:

- Projected fuel savings of **2.07 billion liters annually** (~\$1 Billion USD in foreign exchange savings).
- Annual reduction of **4.5 million tons of CO₂ emissions**
- \$405 Million in healthcare savings related to urban air pollution

Introduction of Financial Instrument:

- Revised uncapped tariff i.e. 39.70 Pkr/KWh
- Proposed Exemption of Tolls
- Annual Tax & Registration exemption in Federal
- Proposed Easy access to Credit through SBP for NEV
- NEV Adoption Levy
- Vehicle Replacement Scheme



Expanded Adoption and Mandatory Targets

- **30% of new vehicle sales by 2030, 50% by 2040, and a Net-Zero fleet by 2060.**
- National Action Plan

Charging Infrastructure & Grid Integration.

- Plan to deploy **3,000 nationwide charging stations by 2030**
- Mandatory EVCI in new city building codes.
- Introduction of **Battery Swapping Networks**
- Support for **Vehicle-to-Grid (V2G)**

Mandatory Government Procurement

- All Public/government fleet vehicle purchases must prioritize NEVs post-2027.



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PAKSITAN EV REGUALTIONS



Pakistan Electric Vehicle Charging Infrastructure & Battery Swapping Regulations -2024





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CURRENT STATUS OF EV TECHNOLOGY IN PAKISTAN

EV Manufacturers/Importers/Assemblers – 4 Wheelers (20 Companies)



EV Manufacturers/Importers/Assemblers – 2/3 Wheelers



Oil Marketing Companies



EVCI and BSS Operational In Pakistan (I/2)



A-Charge
Powered By AEPL



HUBCO



TESLA





EVCI and BSS Operational In Pakistan (2/2)

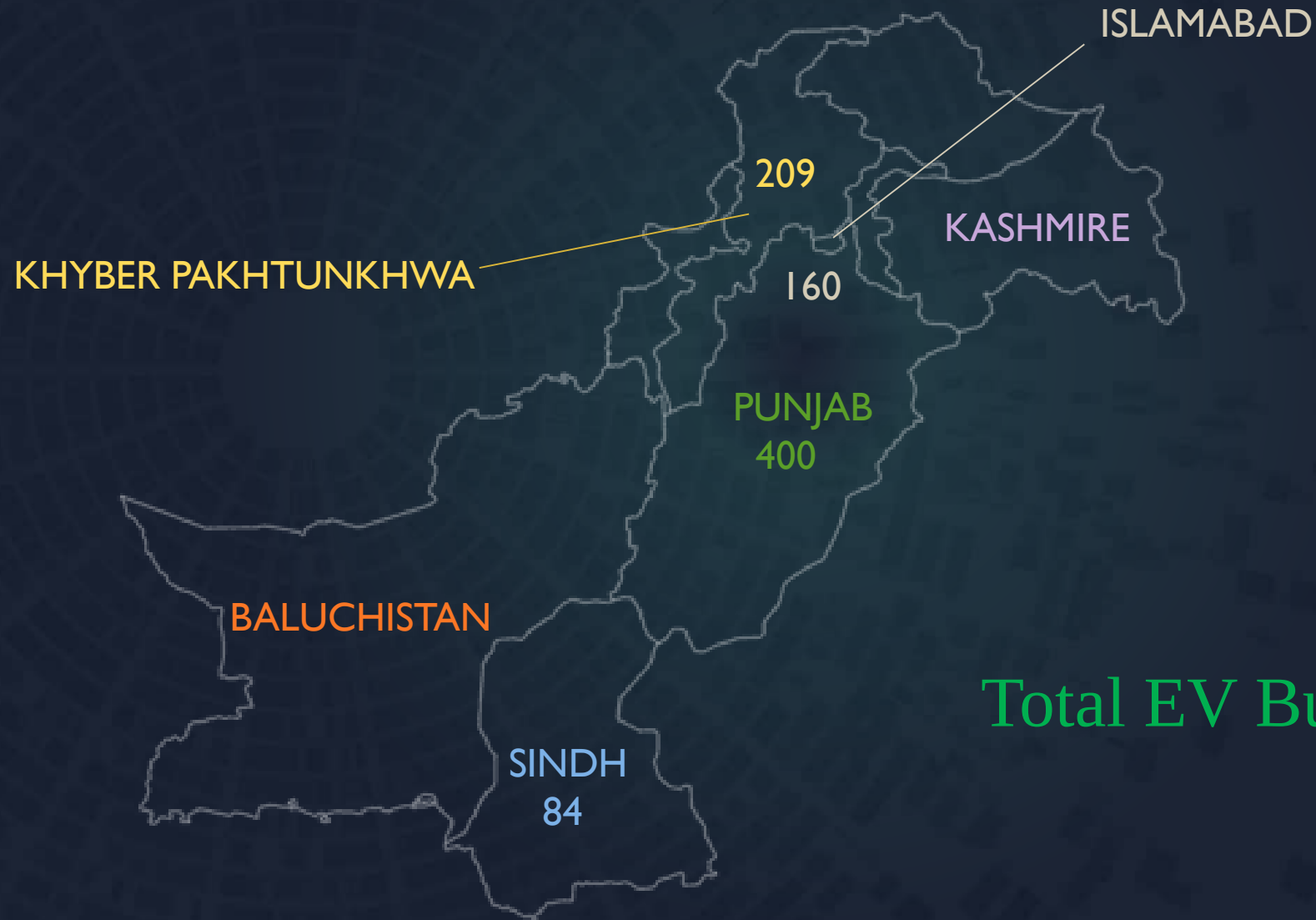
EV Chargers Installed 363

- NEV Target for FY 2025- 2026 240
- NEV Target for FY 2026- 2027 380

IESCO Islamabad Electric Supply Company	102
LESCO Lahore Electric Supply Company	44
FESCO Faisalabad Electric Supply Company	50
GEPCO Gujranwala Electric Supply Company	20
MEPCO Multan Electric Supply Company	73
PESCO Peshawar Electric Supply Company	37

HESCO Hyderabad Electric Supply Company	07
TESCO Tribal Area Electric Supply Company	00
SEPCO Sukkur Electric Supply Company	03
HAZECO Hazara Electric Supply Company	04
QESCO Quetta Electric Supply Company	00
K-Electric Karachi Electric Supply Company	23

Public EV Busses Operational



Total EV Busses Operational
853



EV Charging Station on Motorways



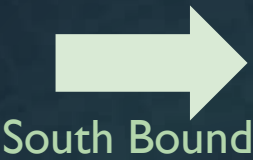
Operational



Planned / under Installation

M-1 Motorway - Pakistan

Peshawar Islamabad
155 Km



Peshawar



Rashakai
48 km



Harro
111 km



Hakla
144 km



Islamabad

Rashakai
108 km



Harro
32 km



Hakla
8 km



North Bound

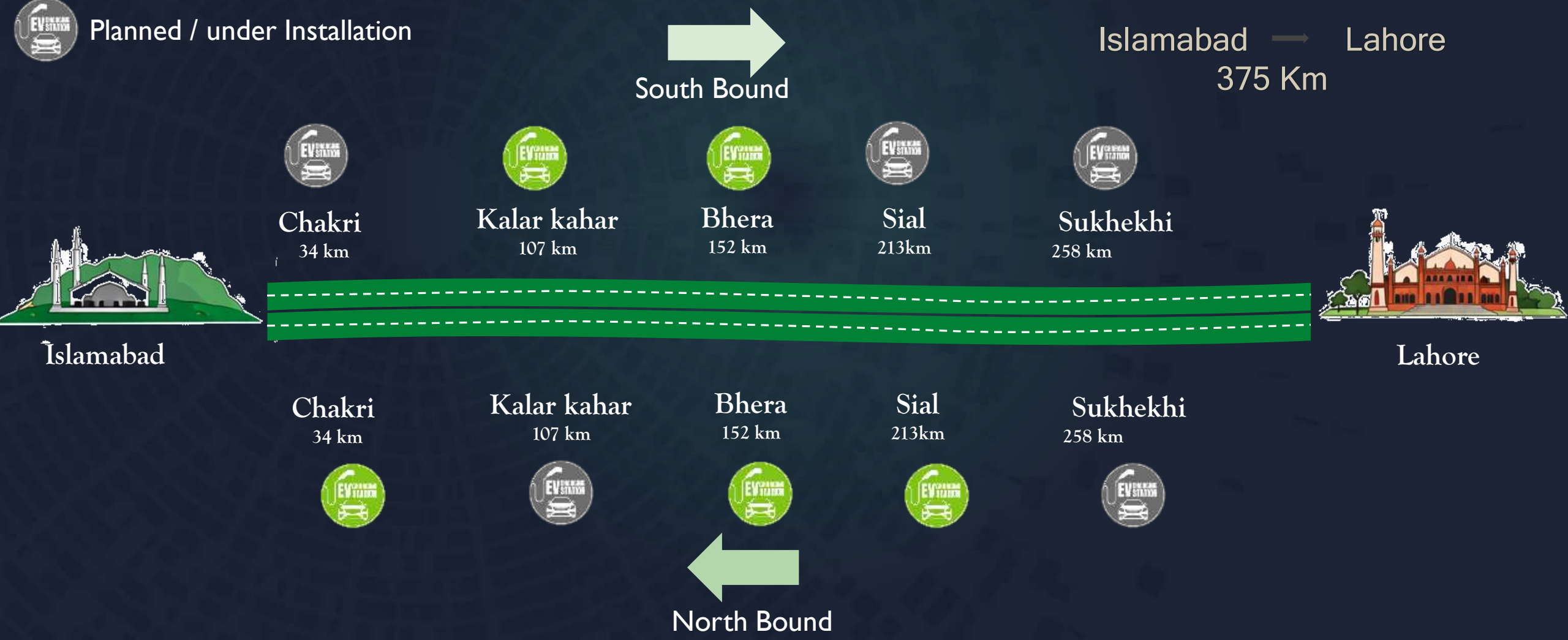


EV Charging Station on Motorways

 Operational

 Planned / under Installation

M-2 Motorway - Pakistan





EV Charging Station on Motoways

 Operational

 Planned / under Installation

M-5 Motorway - Pakistan



Multan

Shershan

Uch

Zahir Pir

Azampur

Rohri



Sukkur

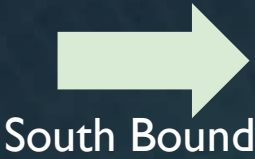
Shershan

Uch

Zahirt Pir

Azampur

Rohri



South Bound



North Bound

Multan Sukkur
392 Km



EV Charging Station on Motorways (Planned)

S.no	Motorway	Location	Planned Chargers	Type
1	M-2 Islamabad-Lahore (5)	Chakri South Bound	01	DC Fast Charger
		Kalar Kahar North Bound	01	DC Fast Charger
		Sial South Bound	01	DC Fast Charger
		Sukheki North Bound	01	DC Fast Charger
		Sukheki South Bound	01	DC Fast Charger
2	M-4 Pindi Bhatia-Faisalabad-Multan (4)	Nankana Sahib North Bound	01	DC Fast Charger
		Nankana Sahib South Bound	01	DC Fast Charger
		Muridwala North Bound	01	DC Fast Charger
		Muridwala South Bound	01	DC Fast Charger



EV Charging Station on Motorways (Planned)

S.no	Motorway	Location	Planned Chargers	Type
2	M-4 Pindi Bhatia-Faisalabad-Multan	Dandewal South Bound	01	DC Fast Charger
		Dandewal North Bound	01	DC Fast Charger
3	M-5 Multan - Sukhur	Uch Sharif North Bound	01	DC Fast Charger
		Uch Sharif South Bound	01	DC Fast Charger
		Azampur North Bound	01	DC Fast Charger
		Azampur South Bound	01	DC Fast Charger
		Rohri North Bound	01	DC Fast Charger
		Rohro South Bound	01	DC Fast Charger
4	M-11 Sialkot-Lahore	Whando North Bound	01	DC Fast Charger
		Whando South Bound	01	DC Fast Charger



EV Charging Station on Motorways (Planned)

S.no	Motorway	Service Area	Planned Chargers	Type
5	M-9 Karachi – Hyderabad	Industrial Valley North Bound	01	DC Fast Charger
		Industrial Valley South Bound	01	DC Fast Charger
6	M-14 Hakla- DI Khan	Jand South Bound	01	DC Fast Charger
		Jand North Bound	01	DC Fast Charger
7	M-15 Hazara motorway	Hazara North Bound	01	DC Fast Charger
		Hazara South Bound	01	DC Fast Charger



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For detail overview of Pakistan EV policies and Regulation:

- New Energy Vehicles Policy 2025-2030 :

<https://moip.gov.pk/Policies>

- Pakistan Electric Vehicle Charging Infrastructure and Battery Swapping Regulations 2024 :

<https://neeca.gov.pk/Detail/MjczZTQwYWYtYzA5Yi00YzM2LTlhNWUtZmMwYTA1MTZlYmJm>

- List of EV Charging and Battery Swapping Stations:

https://neeca.pk/neecafiles/EVCI_List.pdf

- NEPRA Tariff

<https://www.iesco.com.pk/tariff-guide>

Thank You!