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1 big thing: GM shakes up auto regs fight

By: Ben Geman

General Motors is urging the Trump administration to create what amounts to a national electric vehicle sales mandate that's modeled on a program in place in California and followed by 9 other states.

Why it matters: The powerful automaker's proposal Friday adds a new wrinkle to the intense, high-stakes battle over administration moves to scuttle auto mileage and carbon emissions standards for 2021–2025 imposed in the Obama-era.

The big picture: GM says its proposal for a national zero emissions vehicle (ZEV) program could lead to addition of 7 million "long-range" EVs on U.S. roads by 2030.

- This would cut CO2 emissions by a cumulative 375 million tons between 2021 and 2030 over the existing ZEV program, according to GM, which also says the proposal would bolster jobs and U.S. economic competitiveness in the EV space.
- ZEV programs are essentially mandates for EV sales to account for an escalating percentage of an automaker's total sales. They assign credits that are based on the range of the vehicles, and automakers can sell and trade with each other.
- **Of note:** The new proposal is also probably in GM's interest. The automaker plans to launch at least 20 all-electric models by 2023.

Where it stands: It's part of wider comments that GM is filing today on a joint EPA-Transportation Department plan to freeze the escalating Obama standards in 2020 rather than allowing them to keep rising.

- Under the Obama-era plan, the escalating standards would have reached over 50 miles per gallon in 2025 (or around 36 mpg in real-world conditions).
- The administration plan would also revoke California's power to impose standards — which a number of other states can follow — that are tougher than federal mandates.
- That's putting the administration on a legal collision course with California, which is vowing to move ahead with tougher rules even if the national standards are rolled back, if the federal government and the state can't reach a compromise.

The intrigue: GM and other big automakers have applauded White House moves to rewrite auto mileage and emissions rules, calling the Obama-era mandates too onerous and out of step with consumer preferences.

- However, the industry has not embraced Trump's move to outright freeze the standards. The Alliance for Automobile Manufacturers, a big trade group that includes Ford, GM and Toyota, has been saying it supports "year over year" increases.

Mark Reuss, GM executive vice president of global product development, told reporters yesterday that GM's wants to avoid a "protracted legal battle."

- But automakers also want to avoid having to produce vehicles that meet a patchwork of state requirements. "Engineering to multiple standards is very costly and frankly unnecessary," he said.

But, but, but: Environmentalists I touched based with were critical.

- **"GM wants to be able to make a small number of EVs and a vast number of gas guzzling SUVs and other light trucks instead of complying with the clean car standards which they negotiated with the Obama administration," said Daniel Becker, a veteran of battles over auto rules.**
- Public Citizen's Madeline Page said that while she has not seen details of the plan, she believes "This year automakers like GM and Ford have used electric vehicle announcements in order to distract from their (and their trade association's) costly lobbying effort to rollback clean car standards."

The bottom line: Autotrader analyst Michelle Krebs tells Bloomberg...

- "GM is taking a leadership position in at least offering an alternative to what could be this endless battle between the federal government and California. ... Whether the administration will accept it, that's another question."

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