Charging stations for electric vehicles: the Autorité issues its opinion on the competitive functioning of electric vehicle charging infrastructure (EVCI)

Published on June 11, 2024

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Public charging sector value chain

OWNERS

Contractual arrangements or financial relationships, depending on the model chosen

CHARGING OPERATORS

Contracts for access to interoperability services

Flat rate

Bilateral roaming contracts

INTEROPERABILITY PLATFORMS

B2B price

Pay-per-use

Contracts for access to interoperability services

Flat rate

MOBILITY SERVICE PROVIDERS

Purchase/sale of a fob or subscription to an app

Price of the fob (if applicable)

Subscription contract (if applicable)

Subscription price and charging cost

END USER



KEY

Contractual arrangement

Financial/pricing flows

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Types of EV charging

Pay-per-use (without a subscription)

Vehicle charged directly via the CO

Roaming charging via the MSP, also the CO

Vehicle charged via the MSP (specific contract), which is also the CO (single- or multi-network MSP)

Roaming charging via an external MSP

Vehicle charged via a contract with a third-party MSP, which is not the CO



The end user pays either the CO (**pay-per-use, e.g. via a payment terminal on the charging station**) or the MSP (**roaming charging, e.g. via an application or fob**) for their charging. The CO is sometimes vertically integrated and acts as the MSP (directly or via a subsidiary). In this case, the end user can pay the CO/MSP for their charging on a pay-per-use or roaming basis.

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EV charging price parameters and variables

3 At least 3 price parameters

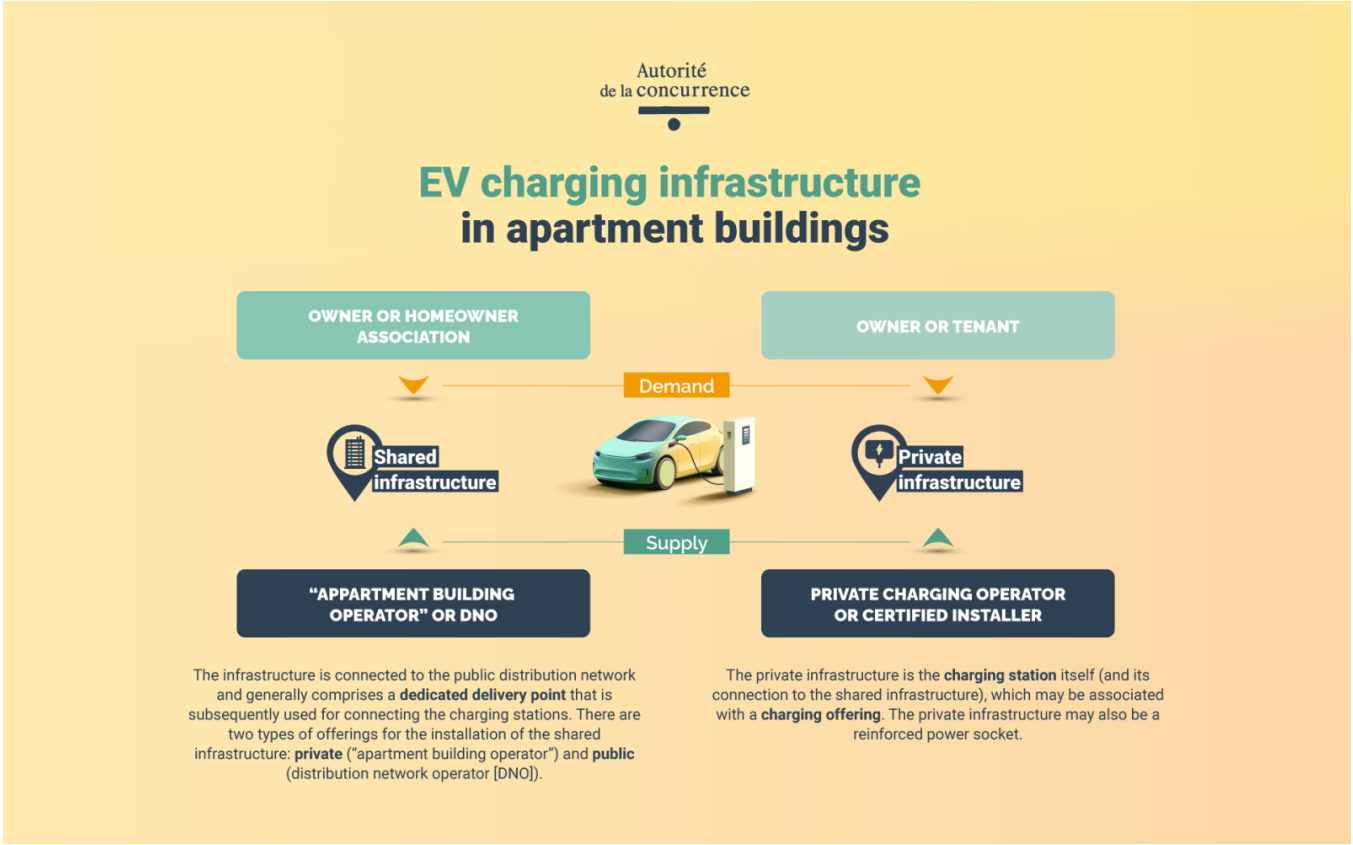
- Price/minute
- Price/kWh
- Session fees

2 At least 2 possible price variables

- Charging station power
- Vehicle characteristics



CHARGING COST



PRESS RELEASE OF 30 MAY 2024

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See the press release