



EV CHARGING INDEX: EXPERT INSIGHT FROM ROMANIA

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While EV adoption accelerates, charging expansion in Romania displays significant room for further development

EV adoption is rising quickly in Romania thanks to generous government incentives. Despite recording the highest ratio of DC chargers in our Index, growth in public charging infrastructure has slowed significantly. This must change if the country is to create more sustainable progress in e-mobility.

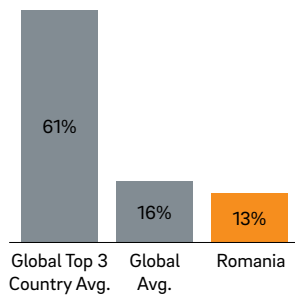
• What are the main e-mobility trends in Romania right now?

Romania dropped six places in the latest Index. We're currently seeing some positive and some less encouraging aspects to its e-mobility sector. On the plus side, EV sales penetration rose considerably to 13% and is just below the global average of 16%. This is strongly tied to the government's Rabla Plus program, now one of Europe's most generous incentive schemes for EV purchasing.

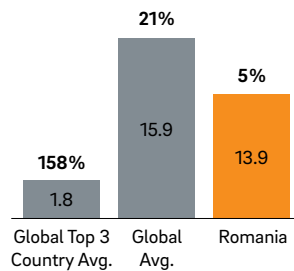
In terms of charging infrastructure, Romania's vehicle-to-point ratio of 13.7 is slightly better than the global average of 15.9. Look a little closer, though, and there is plenty to do. The growth rate for public charging was just 5% – well below the global average of 21%. This means the vehicle-to-point ratio has actually deteriorated. Range anxiety in Romania is also among the highest in Europe, despite recent improvements.

EV adoption is accelerating, but Romania must ramp up expansion of its charging infrastructure – Important for the fast and ultrafast stations to keep momentum

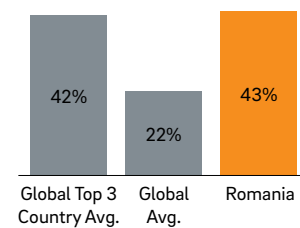
EV sales penetration rate – Passenger Vehicles [%] (H2 2022)



Public charging sufficiency [Vehicle-to-point ratio] (H2 2022)
Public charging growth [%] (H2 2022 vs. H1 2022)



Share of DC fast charging points [%] (H2 2022)



Source Roland Berger, IHS, EV-Volumes



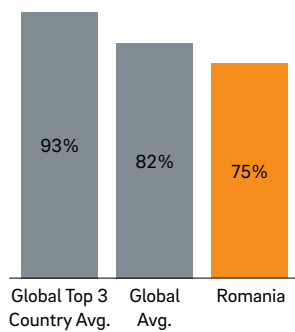
• What else does the Index reveal about customer opinions on e-mobility?

There are certainly reasons for optimism. Three quarters of EV owners said they are generally satisfied with the overall charging experience and 84% of them found that public charging has become easier over the past 6 months. Certain usability aspects require some enhancement, such as visibility of charge point availability and payment processes, but as the professionalism of charge point operators improves, we expect the customer experience and overall satisfaction to continue to grow.

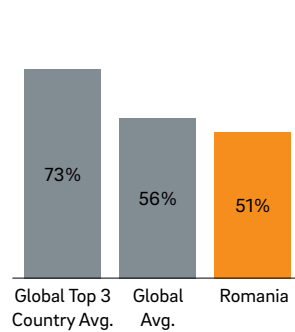
At 43%, Romania has the highest proportion of DC chargers among all countries in our Index. Despite this, charging speed still represents a key development area: only 51% of respondents are satisfied with public charging speed, which is just below the global average of 56%. We expect a significant improvement here as the installation of fast and ultrafast stations gains momentum.

The levels of satisfaction with the current charging experience and the recent improvements are reason for optimism – Charging speed remains a pain point

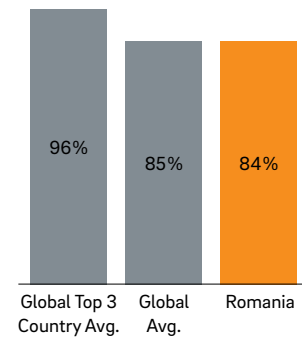
General satisfaction with current charging experience [%] (Feb 2023)



Share of customer satisfied with public charging speed [%] (Feb 2023)



Share of customer who found public charging easier over the past 6 months [%] (Feb 2023)



Source Roland Berger EV Charging Index survey 2023



How will e-mobility evolve in Romania in the next few years?

There are numerous state initiatives to expand the public charging network, which are likely to have a significant impact in the coming years. The National Recovery and Resilience Plan (PNRR), for instance, has committed to funding the construction of 6,500 charging stations by 2026, tripling the current number. And if the current trend of installing predominantly fast and ultrafast charging locations continues, it will provide a major boost to the overall EV market.

The outlook for EV sales is mixed. Subsidies from the Rabla Plus program are an important driver for the growth in EV adoption. But in the long term, these subsidies could limit sustainable development of Romania's e-mobility market. Several European countries, including Germany, Sweden and the Netherlands, are gradually reducing or eliminating financial support for the purchase of hybrid or electric vehicles. This is driven by the fact that the total cost of ownership for EVs in these countries is nearing that of internal combustion engine vehicles. Key to this are the punitive measures for higher polluting vehicles such as taxation or low-emission zones – measures Romania is yet to adopt. If Romania continues its current trajectory, without introducing these sorts of policies, the Rabla Plus program could actually become a barrier to sustainable EV growth by fostering dependence on incentivization.

Further reading

- [EV CHARGING INDEX 2023](#)
- [INSIGHTS: SMART MOBILITY](#)
- [ROMANIAN E-MOBILITY INDEX](#)
- [EV CHARGING BUSINESS MODEL](#)
- [FLEET ELECTRIFICATION](#)

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