

B

EV CHARGING INDEX: EXPERT INSIGHT FROM NORWAY

AUGUST 2023

AUTHORS

BENNY GUTTMAN
Partner

Norway still leads the way for EV sales, but must now focus on its charging infrastructure

At 87%, EV sales penetration in Norway is much higher than any other country. But its public charging infrastructure has not expanded at the same pace – an issue the government now aims to address with its new national charging strategy.

- **What are the main e-mobility trends in Norway right now?**

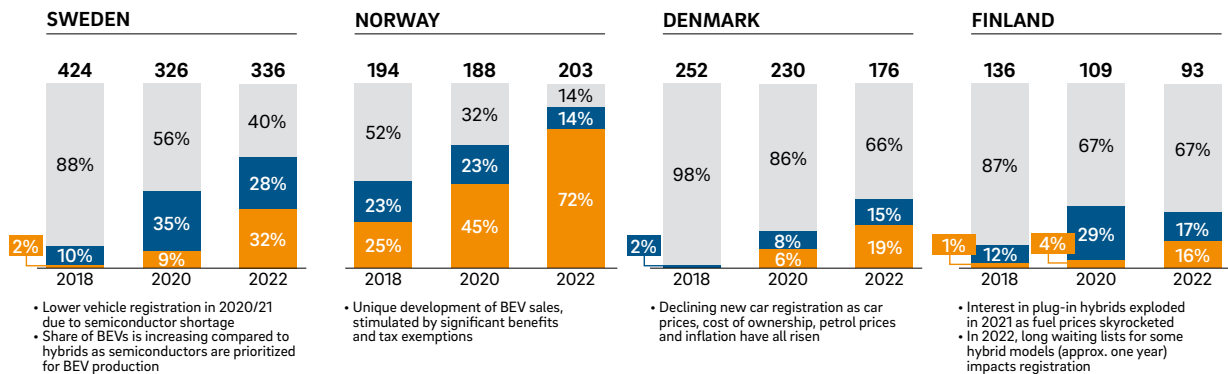
Norway is still the world's best when it comes to EV adoption. The sales penetration rate of 87% is more than 25% ahead of any other country. This is mostly down to its long history of substantial financial incentives for electric vehicles, with the strong purchasing power of Norway's citizens also a factor. The government remains committed to e-mobility: by 2025, it aims to ensure that all new cars sold are zero-emission vehicles. Alongside this is a growing recognition that Norway's charging infrastructure has not developed at the same rate. Earlier in 2023, the government released its national charging strategy, which aims to address this.

Electric and hybrid-electric vehicle registrations are rising in all Nordic countries, with Norway still leading the way

Nordic passenger vehicle and light commercial vehicle registrations per type of powertrain [% , '000]

¹⁾ Petrol, diesel, LPG, LNG, natural gas, fuel oil, light fuel oil, other

BEV
Hybrid (ICE+)
ICE and Other¹⁾



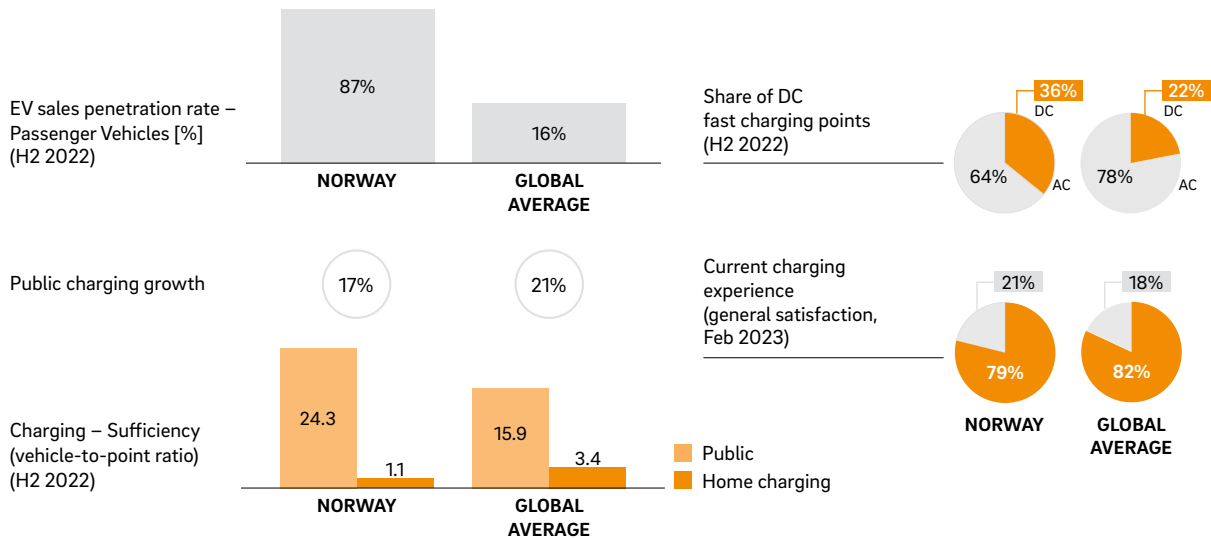
Sources UNECE



What is the current state of Norway's charging infrastructure?

There is a home charge point for almost every EV (1.1 vehicle-to-point-ratio), but the country's public charging system requires expansion. The vehicle-to-point ratio of 24.3 for public charging is some way above the global average of 15.9, while a 17% growth rate in public charging is also below average (21%). Norway does perform better in terms of fast charging. It has implemented fast-charging stations in 50-kilometer increments on all its main roads, and 36% of its public chargers are DC, versus a global average of 22%.

Norway has the world's highest EV sales penetration rate, but it must now expand its public charging infrastructure



Sources Roland Berger EV Charging Index



- **What role does government policy play in charging infrastructure development?**

The new national charging strategy focuses on numerous factors to improve infrastructure for both passenger vehicles and, increasingly, commercial vehicles. Chief aims include: improving grid connection processes and reducing installation times for charge stations; giving more consideration to EV charging stations when it comes to land allocation; and ensuring public chargers are easier to use by introducing a standardized payment solution and uniform price information, among other changes.

Elsewhere, the government is also providing grants for housing associations to cover up to 20% of the purchase and installation costs for EV chargers. This is important for those living in apartment blocks without access to private home chargers.

- **To what extent is the government still supporting EV sales?**

Like its Nordic neighbours, Norway is phasing out policies that favour EVs over internal-combustion-engine vehicles as it has already reached the tipping point for EV adoption. There is now 25% VAT on all new car purchases over NOK 500,000 (EUR 44,000), which removes a previous exemption for EVs. In 2022, the government also reduced the tax reduction for electric company cars to 20% from 40%.

Further reading

- ➔ [EV CHARGING INDEX 2023](#)
- ➔ [INSIGHTS: SMART MOBILITY](#)
- ➔ [ELECTRIFICATION IN THE AGE OF DEGLOBALIZATION](#)
- ➔ [UNPACKED: THE EU'S NEW BATTERY REGULATION](#)
- ➔ [EV CHARGING BUSINESS MODEL](#)
- ➔ [FLEET ELECTRIFICATION](#)

CONTACT:

BENNY GUTTMAN

Partner

+46 31 757-5503

benny.guttman@rolandberger.com

This publication has been prepared for general guidance only. The reader should not act according to any information provided in this publication without receiving specific professional advice. Roland Berger GmbH shall not be liable for any damages resulting from any use of the information contained in the publication.

© 2023 ROLAND BERGER GMBH. ALL RIGHTS RESERVED.