

MOTUS

Comparison of electricity tariffs for EV charging in Europe

Final Report

JULY 2025



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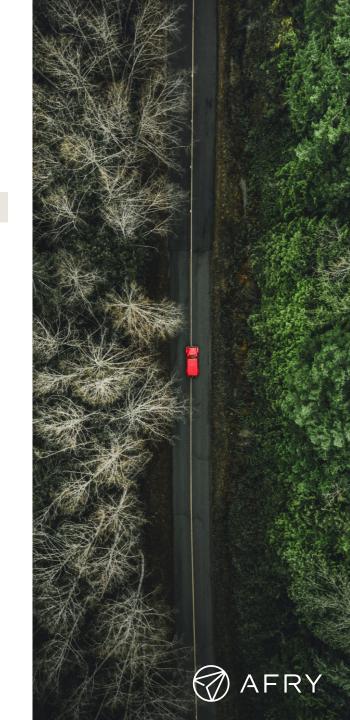


Glossary

Acronym	Definition
СР	Charging Point
FUE	«Fattore di Utilizzo Elettrico», that is «electric utilisation factor", equal to the percentage ratio between the number of equivalent operating hours of a POD (at available power) and 8,760 hours/year (source: ARERA)
LV	Low Voltage
MV	Medium Voltage
POD	Point Of Delivery

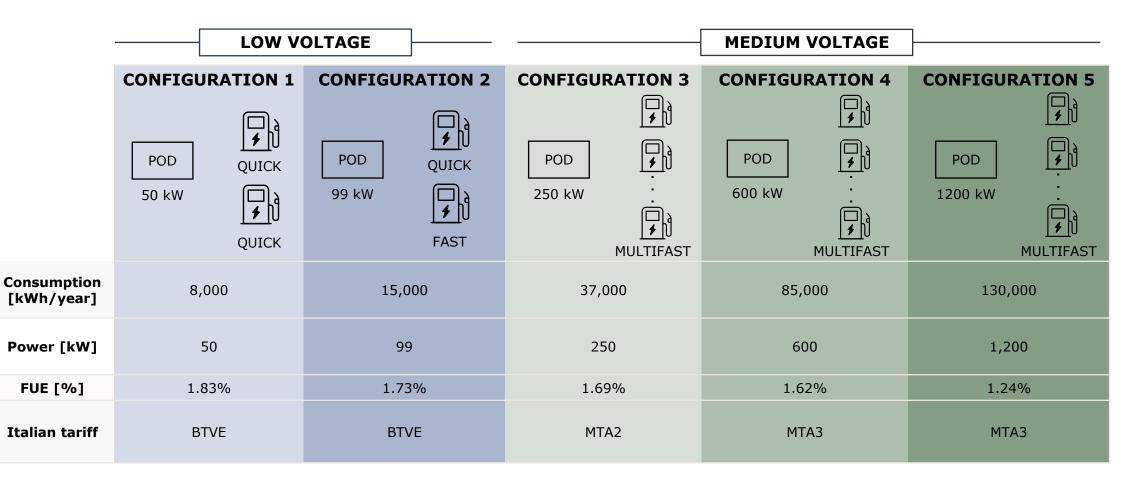


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1. EXECUTIVE SUMMARY

Five typical EV charging configurations have been considered in the analysis to identify and evaluate differences between the related electricity tariffs

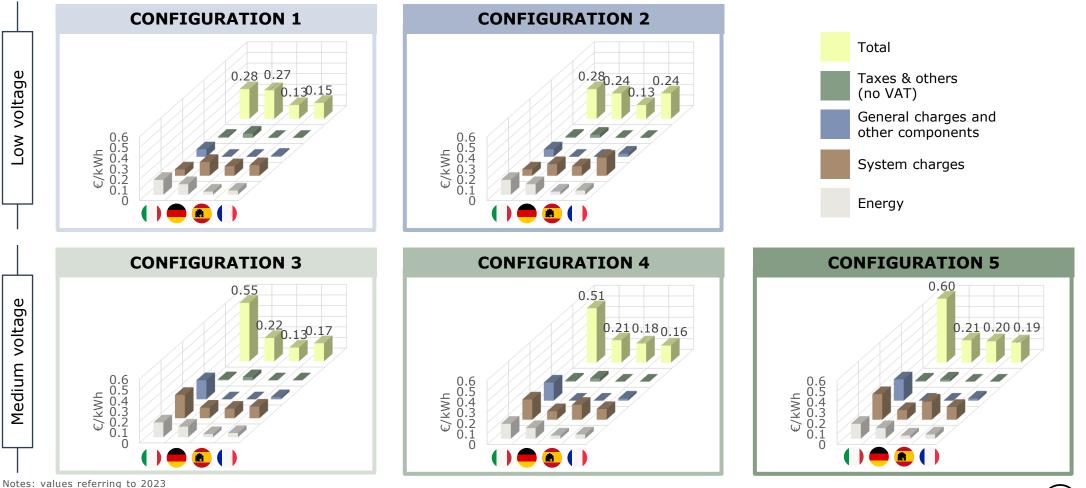


Notes: values agreed with Motus-E. No storage systems and/or secondary energy sources in addition to the electricity grid



1. EXECUTIVE SUMMARY

The Italian electricity tariff is the highest for all configurations, especially at medium voltage where system and general charges account for the bulk of it...

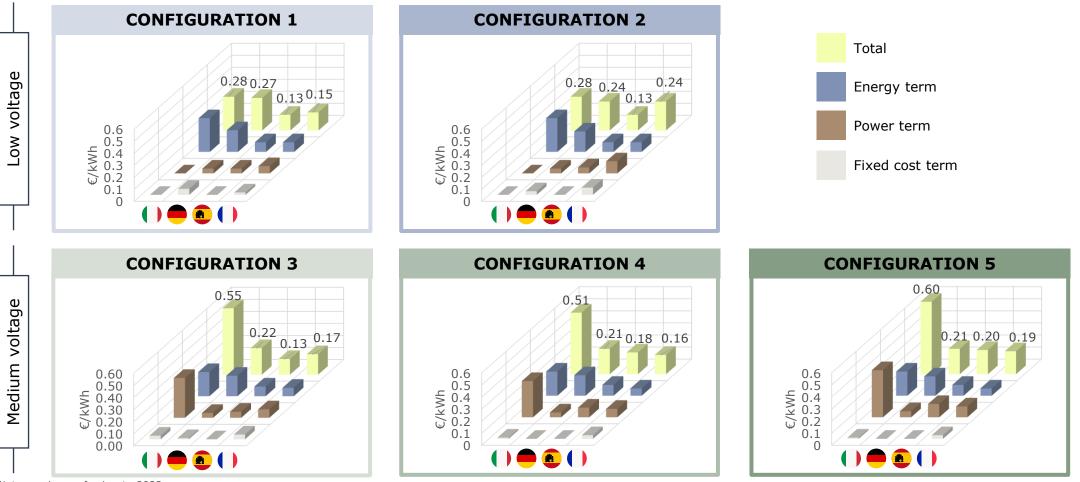






1. EXECUTIVE SUMMARY

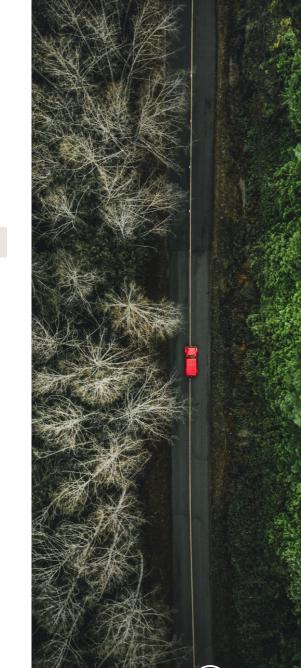
... while power-dependent components generate most of the costs in medium voltage configurations, especially when the utilisation factor is low







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2. SCOPE AND APPROACH OF THE STUDY - SCOPE

Motus-E appointed AFRY to assess the energy tariff for EV charging in key European countries

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Context of the study

- In the public EV charging sector, energy represents a significant operational expenditure that operators must manage, particularly with low utilization of charging infrastructure
- To support the energy transition and promote the decarbonization of transport, some European countries have applied measures to reduce the total energy cost
- Motus-E, the Italian association for electric mobility, has commissioned AFRY to conduct a study on this topic

Scope of the study

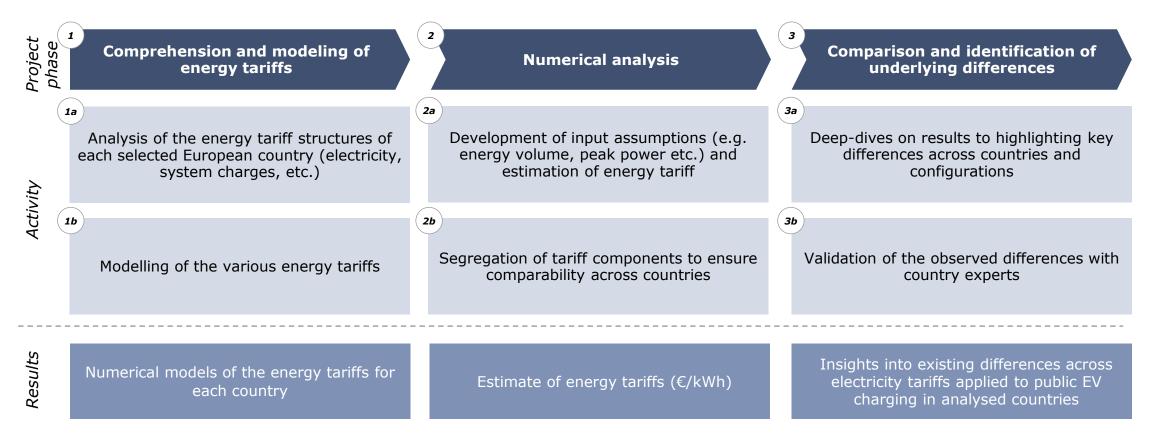
- AFRY modelled and quantified the electricity tariffs that public CPO are most likely to incur in Italy, France, Germany and Spain, to identify the underlying difference
- The analysis focused on selected types of charging configurations that are representative of the current market practice



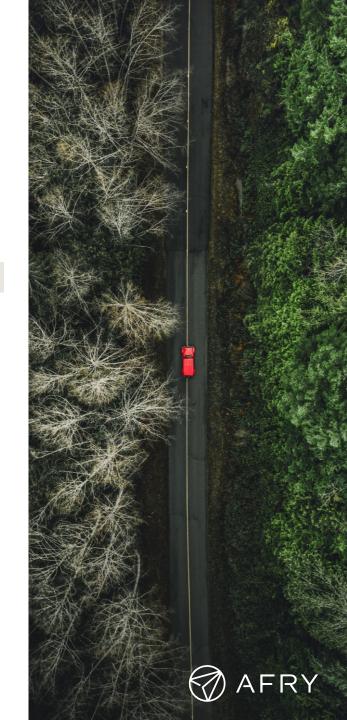


2. SCOPE AND APPROACH OF THE STUDY - APPROACH

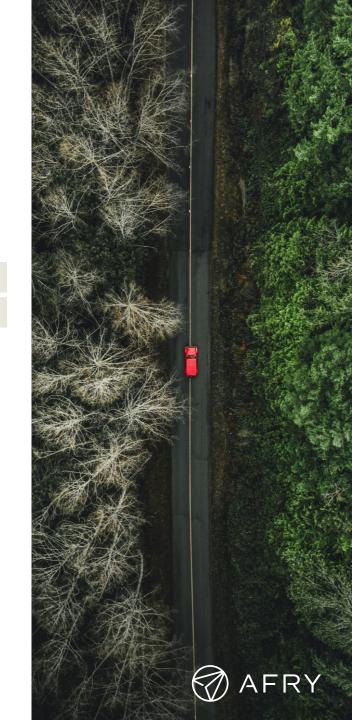
A three-steps approach consisting of tariff modelling, numerical analysis and comparison was applied to achieve the project goal



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The electricity tariff consists of four macro cost-items related to fixed costs, power and energy volume, hence with variable materiality on the final cost

Tariff comp	oonents	Fixed cost term [€/POD/year]	Power term [€/kW/year]	Energy term [€/kWh]	Time based	Materiality on final cost ⁴	Special EVTime-of-useCoveringtarifftarifftariff
	Electricity			✓	✓		Electricity from the either the Italian wholesale market or bilateral agreements with energy providers ⁵ . Losses included
Energy	Supplier margin ¹						Margin added by the energy supplier for its service (often including green energy preference)
	Dispatching			✓	\checkmark	O	Dispatching incurred by TSO (e.g. MSD, wind modulation, capacity market at peak and off-peak, system safety etc.)
	Transmission		\checkmark	\checkmark		O	Transport of electricity on the national transmission grid
System charges	Distribution	\checkmark	\checkmark	\checkmark			Transport of electricity on distribution networks
	Metering	\checkmark		\checkmark		\bigcirc	Installation and maintenance of the meter (meter), as well as the costs of taking and recording measurements
	ASOS	\checkmark	\checkmark	✓			General charges relating to the support of renewable energies and cogeneration
General charges and	ARIM	\checkmark	\checkmark	\checkmark			Remaining general charges (e.g. nuclear decommissioning and R&D costs)
other components	UC3			✓		Ō	Imbalances in electricity transport cost equalisation systems on transmission and distribution networks, and integration mechanisms
	UC6	\checkmark	\checkmark	\checkmark		\bigcirc	Recovery of service quality
Taxes &	Excise duty	√3		\checkmark			Indirect tax with immediate collection levied on the amount of energy consumed
others	Value Added Tax (VAT) ²					•	Indirect tax on supplies of goods and services effected within the territory of the State in the exercise of trade or profession and on imports by any person

Sources: <u>Prezzi e Tariffe (ARERA)</u> | Notes: 1) Excluded, as dependant on the actual agreement with the supplier, 2) Excluded, 3) If energy volume is larger than 1.2 GWh/month, 4) Qualitative assessment for EV charging use, 5) Wholesale market considered, hence dependant on (yearly) market dynamics

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Not relevant for the analysis

🛛 High 🌑 Medium 🕕



Low C

3. OVERVIEW OF COUNTRY ENERGY TARIFFS - ITALY

The macro costs-items depend on the tariff type, which apply upon compliance with certain requirements, including the EV charging end use

TARIFF TYPES AS OF ARTICLE 2, COMMA 2.2 TIT

Letter	User type	Tariff code	
a)	Domestic in low voltage	TD	
b)	Public lighting in low voltage	BTIP	
c)	Public charging points for electric vehicles in low voltage	BTVE	
d)	Users different from a), b) and c) in low voltage	BTAU	
e)	Public lighting in medium voltage	MTIP	
f)	Users different from e) in medium voltage	MTAU	
g)	High voltage	ALTA	
h)	Very high voltage, lower than 380 kV	AAT1	
h)	Very high voltage, equal of higher than 380 kV	AAT1	

COMMENTARY

It is a 'favourable' energy tariff for EV charging provided in publicly accessible places through low voltage grid connection. It was introduced in 2011 (<u>ARG/elt 242/10</u>) to foster the growth of public EV charging and extended since then until today (full 2024)

The MTAU tariffs are meant to serve loads above 100kW with medium voltage grid connection, with no specific use (e.g. public lighting). These tariffs are often utilized for high-power public EV charging when the installed charging capacity is larger than 150-200 kW (e.g. multiple fast chargers at the same location)

The MTAU tariffs **do not introduce any favourable condition for public EV charging to support the business**

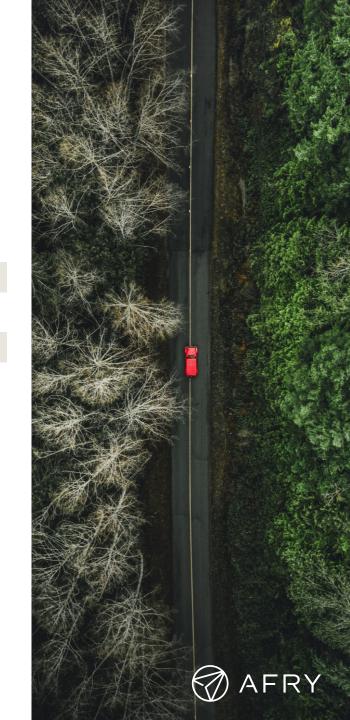


'Time-of-use tariffs' for the specific use case of EV charging are under discussion. Such tariffs basically make tariff components time dependant



Sources: Delibera 616/2023/R/eel, Consultazione 540/2023/R/ee

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3. OVERVIEW OF COUNTRY ENERGY TARIFFS - GERMANY

The electricity tariff consists of four macro cost-items mostly related to energy volume

Tariff components		Fixed cost term [€/POD/year]	Power term [€/kW/year]	Energy term [€/kWh]	Time based	Materiality on final cost ⁴	CoveringSpecial EV tariffTime-of-use tariff
Enorgy	Electricity			✓	(✓¹)	•	Electricity procurement from the wholesale market or bilateral agreements with energy providers. Losses included
Energy	Supplier margin ¹						Margin added by the energy supplier for its service (often including green energy preference)
	Transmission (TSO)		\checkmark	\checkmark	(√ ²)		Transport of electricity in the four national transmissions grids (incl. dispatching)
System charges (grid fees)	Distribution (DSO)		(√ ⁵)	\checkmark	(√²)	\bullet	Transport of electricity in local distribution networks
,	Metering	✓	√3			\bigcirc	Installation and maintenance of the meter, as well as the costs of taking and recording measurements
General	Offshore levy						Costs for the construction and operation of the connection lines between offshore wind parks and the national grid
charges and other	CHP levy		Currently EV chargin	g is exempted from le	vies		Surcharge to the plant operator for the electricity generated by CHP
components	Relief of companies						Compensation for the lost revenue resulting from reduced grid fees in the context of special forms of grid use
	Electricity tax			\checkmark		٢	Electricity consumption tax regulated by federal law
Taxes & others	Concession fee			✓		٢	Municipalities receive money in return for the use of public roads and paths to lay electricity (and gas) lines
	Value Added Tax (VAT) ²						General value added tax on energy-related services

Sources: BNetzA, BMWK | Notes: 1) Time-based contracts are optional, usually energy is sold at fixed terms, 2) Time-based grid fees will be enabled starting in 2025 with exact details to be confirmed, 3) Different meters have to be used depending on power, 4) Qualitative assessment for EV charging use, 5) Depending on the DSO

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Not relevant for the analysis

High Medium Low 🔿





German tariffs are dependent on the yearly offtake as regulations allow for reliefs and prices scale with volume

Tariff components		' Household-equivalient tariff	Public EV			
		(<10 MWh)	Commercial (10-100 MWh)	Industry (>100 MWh)	Special tariffs	
Procurement		Energy pro	ocurement on the wholesale market or within	private agreements for costumers with high of	fftake	
Energy	Distribution	Reduction in distribution	Individual distribution agreements			
	Transmission (TSO)					
System charges (grid fees)	Distribution (DSO)	Offtake on lowest voltage level and thus payment cover cost on all level (9.8 ct/kWh in 2023)	Offtake on medium voltage level (7.4 ct/kWh in 2023)	Offtake on high voltage level thus only cost for high voltage transmission to be paid	Individual agreements with transport and distribution system operators for special offtake	
	Metering			(3.3 ct/kWh in 2023)		
Conoral	Offshore levy					
General charges and other	CHP levy	Levies are (~1 ct/kWh in 2023)	Reliefs can be obtained under certain circumstances			
	Relief of companies					
	Electricity tax	Electricity tax is genera (~2 ct/kW	ally paid by all offtakers h in 2023)	Industry companies pay the Eu (~0.05 ct/		
Taxes & others	Value Added Tax (VAT)	End-consumer (19%)		Forwarded to end consumer (19%)		
	Concession fee	Highest fees according to federal law (1.6 ct/kWh)	Medium fees according to federal law (0.8 ct/kWh)	Lowest fees according to federal law (0.1 ct/kWh)		

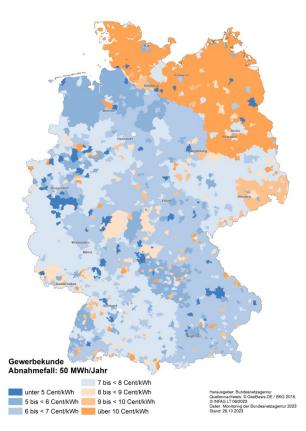




3. OVERVIEW OF COUNTRY ENERGY TARIFFS - GERMANY

German grid fees are highly dependent on location as they are dependent on local network operators and offtakers

GRID FEES FOR COMMERCIAL COSTUMERS IN 2023¹



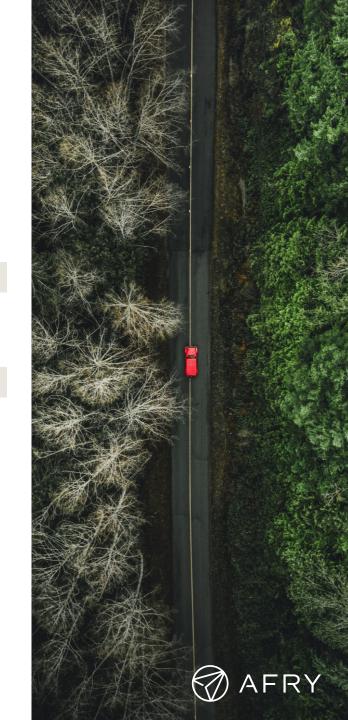
Notes: 1. Bundesnetzagentur

CALCULATION OF GRID FEES

- Grid fees are derived in three steps:
 - **1. Determination of grid costs:** The cost basis for grid fees Is determined in regulatory periods of five years
 - **2. Determination of permissible revenues**: The recognized grid costs are converted into a revenue cap in accordance with the regulations
 - **3. Formation of grid charges**: The grid operators determine the grid charges based on the principles of the StromNEV
- This results in location-dependent grid fees
- For commercial customers with 50 MWh offtake, grid fees varied from 1.39 to 31.99 cent/kWh with an overall average of 7.42 cent/kWh in 2023¹
- Key factor for regional differences are:
 - Population density: In sparsely populated areas, the grid costs are distributed among a small number of grid users
 - Varying costs for **bottleneck management**
 - Age of the grids: Older grids with low residual values lead to lower grid costs than new grids
 - Grid quality: This has a direct influence on the revenue cap via the Q element
- Starting in 2024 variable grid fees will be in place for offtakers in turn for adjustment of power output (mostly relevant for households)



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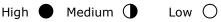


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Tariff components		Fixed cost term [€/POD/year]	Power term [€/kW/year]	Energy term [€/kWh]	Time based	Materiality on final cost ⁴	Special EVTime-of-useCoveringtariff
_	Electricity			✓	✓		Electricity from the either the Spanish wholesale market or bilateral agreements with energy providers. Losses included
Energy	Supplier margin ¹						Margin added by the energy supplier for its service (including green energy preference)
	Transmission tolls		~	✓	\checkmark	O	Transport of electricity on the national transmission grid
Tolls & Charges	Distribution tolls		~	\checkmark	\checkmark		Transport of electricity on distribution networks
	Grid charges		√3	\checkmark	~	\bigcirc	General system charges relating to the support of renewable energies and cogeneration, as well as non-mainland price adjustment
Other charges	Metering equipment and rental	~				O	Installation and maintenance of the meter (meter), as well as the costs of taking and recording measurements
	Social Bond	✓		✓	\checkmark	\bigcirc	Transitory measure aimed to support vulnerable consumers
Taxes &	Impuesto Especial Electricidad (IEE)				~	\bigcirc	Special tax levied on the amount of energy consumed but proportional to economic value
others	Value Added Tax (VAT) ²				~		Indirect tax on supplies of goods and services effected within the territory of the State in the exercise of trade or profession and on imports by any person. Usual levels at 21%, however has been as low as 5% depending on price context and government measures

Sources: REE, CNMC, <u>Charges</u>, <u>Tolls</u> Notes: 1) Excluded, as dependent on the actual agreement with the supplier, 2) Excluded, 3) As of now no dependency on power term, grid charges are aimed to be paid fully via the energy term but could potentially change, 4) Qualitative assessment for EV charging use

Not relevant for the analysis





3. OVERVIEW OF COUNTRY ENERGY TARIFFS - SPAIN

In recent years, EV-specific regulated tariffs 3.0TDVE/6.1TDVE were released to support the sector. Hourly periods have an impact on end-prices

REGULATED TARIFF GROUPS

		Group	Voltage Level	Contracted Power	Constraints		
		2.0TD	$\leq 1 \text{kV}$	\leq 15kW in all periods	-		
		3.0TD	$\leq 1 \text{kV}$	>15kW in any hourly period	Contracted power $P_{n+1} \ge P_n^{-1}$		
		6.1TD	(1, 30kV)	Any	Contracted power $P_{n+1} \ge P_n^{-1}$		
		6.2TD	[30, 72.5kV)	Any	Contracted power $P_{n+1} \ge P_n^{-1}$		
		6.3TD	[72.5, 145kV)	Any	Contracted power $P_{n+1} \ge P_n^{-1}$		
	Grid	6.4TD	≥ 145kV	Any	Contracted power $P_{n+1} \ge P_n^{-1}$		
Ch	arges	2.0TDA					
	3	3.0TDA			Applied to the self-consumed energy of		
		6.1TDA	Same as	Same as above	installations in which generation and		
		6.2TDA	above	Same as above	consumption are not connected directly but		
		6.3TDA			through the grid		
		6.4TDA					
	Specific	3.0TDVE	<1kV	>15kW in any hourly period	Supply point of exclusive usage for		
carn	ii gioups	6.1TDVE	≥1kV	>15kW in any period	EV charging ² & CP must be public		

	Charges Tariff Group	Tolls Tariff Group		
	1	2.0TD & 2.0TDA		
	2	3.0TD & 3.0TDA		
Grid	3	6.1TD & 6.1TDA		
Tolls	4	6.2TD & 6.2TDA		
	5	6.3TD & 6.3TDA		
	6	6.4TD & 6.4TDA		
EV/specific tariff groups	2VE	3.0TDVE		
	3VE	6.1TDVE		

HOURLY PERIOD DISCRIMINATION

- Grid tolls and charges are set for each tariff group and each of the 6 hourly periods (1, 2, 3, 4, 5 & 6) or "time bands", hence defined "time-of-use" tariff
- Hourly periods depend on:
 - The electricity season (High, Medium-high, Medium and Low) which changes every month
 - The day-type (Type A, Type B, Type B1, Type C and Type D) which depends on the day of the week and bank holidays
 - The hour within each day-type
- Contracted power can be different for each hourly period but always increasing, not decreasing: Hourly period 1 must have the lowest contracted power and increasing thereafter $(P_{n+1} \ge P_n)$

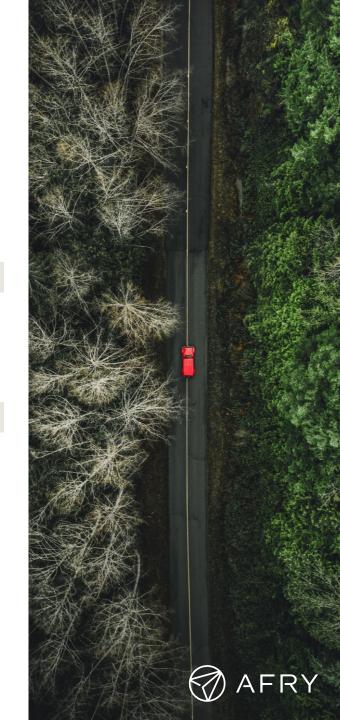
					Month										
lour of day	1	2	3	4	5	6	7	8	9	10	11	1			
0	6	6	6	6	6	6	6	6	6	6	6				
1	6	6	6	6	6	6	6	6	6	6	6				
2	6	6	6	6	6	6	6	6	6	6	6				
3	6	6	6	6	6	6	6	6	6	6	6				
4	6	6	6	6	6	6	6	6	6	6	6				
5	6	6	6	6	6	6	6	6	6	6	6				
6	6	6	6	6	6	6	6	6	6	6	6				
7	6	6	6	6	6	6	6	6	6	6	6				
8	2	2	3	5	5	4	2	4	4	5	3				
9	1	1	2	4	4	3	1	3	3	4	2				
10	1	1	2	4	4	3	1	3	3	4	2				
11	1	1	2	4	4	3	1	3	3	4	2				
12	1	1	2	4	4	3	1	3	3	4	2				
13	1	1	2	4	4	3	1	3	3	4	2				
14	2	2	3	5	5	4	2	4	4	5	3				
15	2	2	3	5	5	4	2	4	4	5	3				
16	2	2	3	5	5	4	2	4	4	5	3				
17	2	2	3	5	5	4	2	4	4	5	3				
18	1	1	2 2	4	4	3	1	3	3	4	2				
19	1	1		4	4	3	1	3	3	4	2				
20	1	1	2	4	4	3	1	3	3	4	2				
21	1	1	2	4	4	3	1	3	3	4	2				
22	2	2	3	5	5	4	2	4	4	5	3				
23	2	2	3	5	5	4	2	4	4	5	3				
Weekends	6	6	6	6	6	6	6	6	6	6	6				

Sources: <u>Circular 3/2020</u>, <u>Charges</u>, <u>Tolls</u> | (1) Contracted power can be different for each hourly period, (2) Not complying with this incurs in 20% cost penalty. TD stands for 'Tablero Distribución' 'A' for "Autoconsumo" (self-consumption) and 'VE' for Electric vehicle

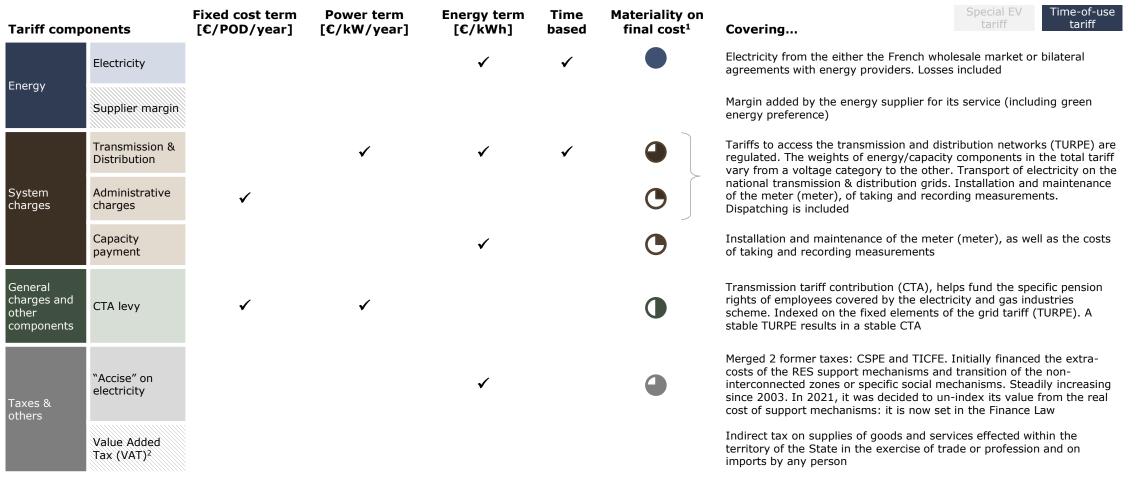
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The French electricity retail tariff structure is built on four main components comprising energy costs, system charges, general charges, levies and taxes



Sources: CRE, AFRY Analysis | Notes: 1. Qualitative assessment for EV charging use, 2. Excluded



Medium (

Low (

Hiah

3. OVERVIEW OF COUNTRY ENERGY TARIFFS - FRANCE - GRID CHARGES

Grid tariffs are paid to the TSO/DSO, directly or via the retailer, and are regulated by the CRE

FOUR PRINCIPLES FOR THE GRID TARIFFS

Main principles



Postage stamp principle:

The tariff is independent of the distance travelled by the electricity between the site where it was generated and the site where it is consumed



Principle of tariff equalisation:

In a spirit of solidarity between territories, the TURPE is applied in the same way throughout mainland France territory

Additional principles



Principle of a dual tariff component (binomial tariff):

Excluding HTB3 and injection, the tariff comprises a power and an energy component, to take account of the different consumption patterns of the customers

Time-of-use principle:

Variation of the withdrawal component according to the time of use of the network to account for the stress level of the system

INDEXATION OF THE TARIFF SCHEDULE

- Every 4-6 years, the whole tariff structure is revised by the CRE: TURPE 7 application will start in 2025 (for the 2025-29 period) to account for structural changes in investment and operational costs incurred by the TSO
- During each period, annual update on August 1st, based on:
 - The consumer price index (CPI) excluding tobacco
 - The *ex-post* correction of deviations in revenue and expenditure in relation to authorised income (+/-2%)

Regulator & TSO _____

The Energy Regulation Commission (CRE)



CRE, the French Energy Regulatory Commission, was created on 24 March 2000. Its role is to ensure that the electricity and gas markets in France operate smoothly, for the benefit of end consumers and in line with energy policy objectives.

RTE (Réseau de Transmission d'Électricité)



Public company (owned by EDF at 50.1%) in charge of operating and managing the electricity transmission grid in the country, namely designed as the Transmission System Operator (TSO).



Sources: AFRY analysis, CRE, RTE, Enedis

3. OVERVIEW OF COUNTRY ENERGY TARIFFS - FRANCE - GRID TARIFF

The choice of voltage range and the consumption profiles highly impact grid costs

ada an asmashisa/s

APPLICABLE GRID TARIFFS	Depends on connection's intensity level (In)			
Connection Voltage	Applicable tariff			
0 kV < Un ≤ 1 kV	BT ≤36 kVA			
0 KV < 011 2 1 KV	BT >36 kVA			
1 kV < Un ≤ 50 kV	HTA			
50 kV < Un ≤ 130 kV	HTB1			
130 kV < Un ≤ 350 kV	HTB2			
350 kV < Un ≤ 500 kV	HTB3			

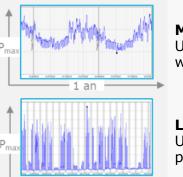
 Low and Medium voltage tariffs cover Enedis's costs, while High voltage tariffs cover RTE's costs

CONSUMPTION PROFILES & TARIFF VERSIONS

- There are three tariff versions: Short Use (SU), Medium Use (MU) and Long Use (LU), according which the withdrawal component factors vary to adapt to the consumption profiles
- The Customer chooses which one to apply:



High: **Long Use** - "Longue Utilisation", typical of continuous process consumers (band profile)



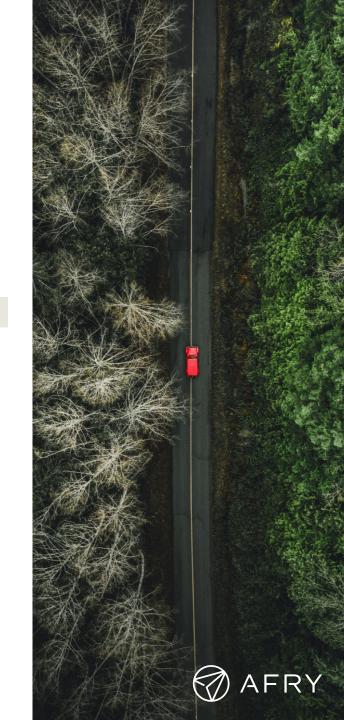
Medium: Medium Use - "Moyenne Utilisation", typical of distributors without RES generation

Low: Short Use - "Courte Utilisation", typical of discontinuous process consumers



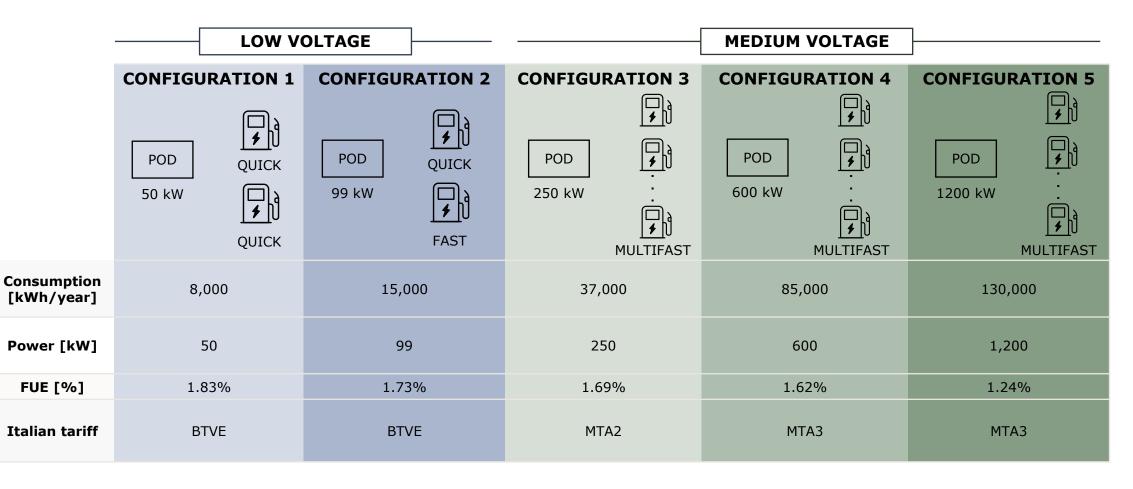
Sources: AFRY analysis, CRE, RTE

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Five typical EV charging configurations have been considered in the analysis to identify and evaluate differences between the related electricity tariffs



Notes: values agreed with Motus-E. No storage systems and/or secondary energy sources in addition to the electricity grid





4. INDIVIDUAL CONFIGURATION ASSESSMENT Configuration 1

		-		
Applied tariff	BTVE	Household- equivalent	3.0 TDVE	BT ≤36 kVA
Components [€/kWh]				
Energy	0.14	0.10	0.03	0.04
System charges	0.06	0.13	0.09	0.10
General charges and other components	0.07	0.00	0.00	0.01
Takes & others (no VAT)	0.01	0.04	0.00	0.00
Total	0.28	0.27	0.13	0.15
Fixed cost term	0.00	0.05	0.00	0.02
Power term	0.00	0.04	0.04	0.06
Energy term	0.28	0.18	0.08	0.08

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		-			Configuration specifics
Applied tariff	BTVE	Commercial	3.0 TDVE	BT ≤36 kVA	Consumption [kWh/year]
Components [€/kWh]					15,000
Energy	0.14	0.10	0.03	0.04	Power [kW]
System charges	0.06	0.11	0.09	0.17	
General charges and other components	0.07	0.00	0.00	0.03	99
Takes & others (no VAT)	0.01	0.03	0.00	0.00	FUE [%]
Total	0.28	0.24	0.13	0.24	1.73%
Fixed cost term	0.00	0.03	0.00	0.06	Italian tariff
Power term	0.00	0.04	0.05	0.10	
Energy term	0.28	0.17	0.08	0.08	BTVE





		-			Configuration specifics
Applied tariff	MTA2	Commercial	3.0 TDVE	HTA	Consumption [kWh/year]
Components [€/kWh]					37,000
Energy	0.14	0.10	0.03	0.04	Power [kW]
System charges	0.22	0.03	0.09	0.11	
General charges and other components	0.18	0.00	0.00	0.02	250
Takes & others (no VAT)	0.01	0.03	0.00	0.00	FUE [%]
Total	0.55	0.22	0.13	0.17	1.69%
Fixed cost term	0.03	0.01	0.00	0.04	Italian tariff
Power term	0.33	0.04	0.05	0.07	
Energy term	0.20	0.17	0.08	0.07	MTA2





		-			Configuration specifics
Applied tariff	MTA3	Commercial	6.1 TDVE	НТА	Consumption [kWh/year]
Components [€/kWh]					85,000
Energy	0.14	0.10	0.03	0.04	Power [kW]
System charges	0.19	0.08	0.14	0.10	
General charges and other components	0.17	0.00	0.00	0.02	600
Takes & others (no VAT)	0.01	0.03	0.00	0.00	FUE [%]
Total	0.51	0.21	0.18	0.16	1.62%
Fixed cost term	0.01	0.00	0.00	0.03	Italian tariff
Power term	0.30	0.04	0.08	0.07	
Energy term	0.20	0.17	0.09	0.06	MTA3





					Configuration specifics
Applied tariff	MTA3	Industrial	6.1 TDVE	HTA	Consumption [kWh/year]
Components [€/kWh]					130,000
Energy	0.14	0.10	0.03	0.04	Power [kW]
System charges	0.24	0.09	0.17	0.12	
General charges and other components	0.20	0.00	0.00	0.00	1,200
Takes & others (no VAT)	0.01	0.02	0.00	0.00	FUE [%]
Total	0.60	0.21	0.20	0.19	1.24%
Fixed cost term	0.01	0.00	0.00	0.03	Italian tariff
Power term	0.39	0.05	0.11	0.09	
Energy term	0.20	0.16	0.09	0.06	MTA3



The AFRY team brings together expert knowledge of electric mobility and energy markets



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Orazio is a senior expert of mobility services operated through BEV fleets. Before joining AFRY he led car2go (Share Now) Iberia operating the car sharing business through a BEV fleet of 800 Smart EV; he oversaw business development for Acciona Mobility operating a fleet of 8,000 electric mopeds in Europe; as consultant he led projects on EV charging, fleet management, among others. Orazio was also involved in UI design and system integration projects



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Paolo has been part of the Milan office since 2015 and is responsible for forward looking market analysis projects in Italy. Paolo has led a large number of projects focused on the assessment of power price evolution at both wholesale and retail level. In parallel, he has also been responsible for valuation activities on power generation assets including RES, storages, thermal and hydro



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