

## Electric Vehicle and Charging Infrastructure Projection Prepared by the Turkish Energy Market Regulatory Authority has Been Published

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The Turkish Energy Market Regulatory Authority ("**EMRA**"), in its April 2024 publication of the Electric Vehicle and Charging Infrastructure Projection ("**Projection**"), initially presented information on the evolution and fundamental structure of the electric vehicle and charging service market, followed by forecasts for the years 2024 to 2035.

## **1. EMRA's efforts on the electric vehicle and charging service market**

EMRA has identified increasing the number of electric vehicles and rapidly expanding the charging infrastructure across the country as a strategic objective. To fulfill this objective, EMRA has been working in cooperation with institutions and sector representatives operating in the electric vehicle and charging services market for a long time and closely monitoring activities carried out in Türkiye. EMRA has worked on the development of charging service legislation, and its main work, the Regulation on Electric Vehicle Charging Services, includes provisions on charging network operator licensing, licensing process, establishment and development of the charging network, rights and obligations of the licensee, establishment and operation of charging stations, pricing, monitoring and reporting rights and obligations of electric vehicle users, and sanctions.

**a. Şarj@TR mobile application:** EMRA developed the Şarj@TR mobile application for electric vehicle users. Through this application, electric vehicle users will be able to instantly monitor the prices of charging services and reach their preferred charging stations smoothly and comfortably. More information can be accessed regarding the Şarj@TR mobile application via the following link: [Şarj@TR](#)

**b. Green charging stations:** Electric vehicles are environmentally friendly and increase energy efficiency. Accordingly, EMRA has added the concept of "green charging station" to the legislation, which certifies that all the electricity supplied to electric vehicles is generated by renewable energy sources, and approximately half of the charging stations in Türkiye provided by licensed charging network operators are within this scope.

## **2. Operation of the Charging Network**

Companies wishing to engage in charging network operations must apply to EMRA for a charging network operator license. Charging network license holders are expected to establish a charging network consisting of at least 50 charging units in at least 5 different districts within 6 months after obtaining a license.

## **3. Pricing of Charging Service**

In Türkiye, the pricing of the charging service is applied in terms of the unit energy cost transferred to the electric vehicle user (TRY/kWh), and no additional charge is demanded under any other name other than the price calculated based on the unit energy cost and service price.

## **4. Projections for Electric Vehicle and Charging Service Markets**

Before the establishment of the legal infrastructure for charging service activities, only 5 companies were operating in the market, whereas 176 companies are operating in the market as of April 2024. In addition, while there were 14.896 electric vehicles in Türkiye at the beginning of 2023, this number increased to 93.973 by April 2024. Thanks to the investments made by licensed charging network operators, the number of charging points in Türkiye increased from 3.081 in early 2023 to 17.233 by April 2024.

EMRA has formed its estimates of the number of electric vehicles and charging points based on (i) new vehicle demand, (ii) population growth with a high density of young people, (iii) growth in the automotive market, (iv) potential incentives, (v) access to electric vehicles, (vi) the speed of addressing concerns of electric vehicle users, and (vii) the pace of transitioning to electric technologies in automotive manufacturers. In this regard, the 3 main scenarios, namely low, medium and high, are presented below:

### **a. Electric vehicle projection**

Year	Electric Vehicle Projection		
	Low	Medium	High

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