

A man in a blue suit is charging a red electric car. The background is a blurred city street with other cars. A large orange graphic element is overlaid on the left side of the image.

**LeasePlan**

# EV Readiness Index 2019

LeasePlan

January 2019



# Context

- Transport is the fastest-growing contributor to climate change, with road transport accounting for approximately 20% of carbon dioxide emissions in the EU alone
- c. 50% of vehicles on the road today are registered to corporate organizations. Corporates are therefore incredibly important in leading the transition to a more sustainable transport system
- Making the switch to a low-emission fleet is one of the easiest ways for businesses to lower their overall emissions footprint and to help tackle climate change. It can be done with the stroke of a pen: no change of strategy is required.



# About the EV Readiness Index 2019

- LeasePlan's EV Readiness Index 2019 is a comprehensive analysis of the preparedness of 22 European countries for the electric vehicle revolution.
- The Index is based on four factors: the maturity of the EV market (also including plug-in hybrids), the maturity of EV infrastructure, government incentives and LeasePlan's experience with EVs in each country.
- The 22 countries included in the LeasePlan EV Readiness Index 2019 are: Austria, Belgium, the Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Luxembourg, the Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Spain, Sweden, Switzerland and the United Kingdom.



# Key findings

## EV Readiness Index 2019 (1 of 2)

- The EV Readiness Index 2019 shows that Norway, the Netherlands, Sweden and Austria are now the best prepared countries in Europe for the electric vehicle revolution.
- For the first time, all countries in the index have shown an improved score compared to last year, signalling increased EV readiness across the continent.
- Not all countries are improving at the same pace, reflecting a lack of action by policymakers on key EV enablers, such as charging infrastructure, purchase subsidies, registration tax benefits, ownership tax benefits, company tax benefits and VAT benefits.



# Key findings

## EV Readiness Index 2019 (2 of 2)

- Finland (+7 places) Germany (+4) and Portugal (+4) improved their ranking significantly, as a result of better charging infrastructure, a higher percentage of EV registrations and more attractive government incentives.
- The Netherlands has the most public charging plugs available (83,196), followed by Germany (37,405) and France (34,558). When adjusted for population size, the top three countries are now the Netherlands (4.8 charging plugs per 1,000 inhabitants), Norway (4.5) and Luxembourg (1.9).
- Austria, Ireland, Germany and the Netherlands scored the highest in terms of government support for EVs, including purchase subsidies, registration tax benefits, ownership tax benefits, company tax benefits and VAT benefits.

# LeasePlan EV country readiness index 2019



Country	Total scoring	EV maturity	Charging maturity	Government incentives	LeasePlan maturity
Norway	34	12	7	7	8
Netherlands	33	9	8	8	8
Sweden	29	9	6	7	7
Austria	28	7	6	9	6
Finland	26	7	6	6	7
Germany	25	7	5	8	5
United Kingdom	25	5	6	7	7
Portugal	24	7	5	5	7
Belgium	23	7	5	5	6
Luxembourg	23	7	6	5	5
Ireland	23	7	5	8	3
France	22	7	5	4	6
Switzerland	22	8	6	3	5
Denmark	20	6	6	1	7
Spain	20	4	4	6	6
Hungary	19	5	5	6	3
Italy	17	5	4	3	5
Romania	12	2	4	5	1
Slovakia	12	2	5	4	1
Czech Republic	11	4	5	1	1
Greece	10	2	2	4	2
Poland	9	3	3	2	1



# EV Readiness Index rankings are determined using four key factors

Category	Weighting	KPI	Max. points per KPI
1) Maturity of <b>electric vehicle market</b> in a country	32%	• # EVs registered in 2018 / total population	5
		• Marketshare of EVs from all vehicles registered in 2018	5
		• Share of full electric (BEV) in the sales of EVs	2
2) Maturity of <b>charging infrastructure</b> in a country	26%	• # available public charge plugs / total population	5
		• # public charge plug per EV registered	2
		• % of fast chargers (>22KW) of total charging plugs	3
3) <b>Government incentives</b>	21%	• Score of all government incentives currently in place	5
		• Score of benefit-in-kind taxation benefits for the EV drivers	3
4) <b>LeasePlan Maturity</b>	21%	• Score of the EV facilitation and providing of end-to-end EV services of the LeasePlan country organization	5
		• % of EV in total orders 2018 and expected for 2019, split in full-electric and plugin-hybrid	3

#### Sources used:

- ACEA - European Automobile Manufacturers' Association
- EAFO - European Alternative Fuels Observatory
- Eurostat
- Plugsurfing
- Chargemap.com
- LeasePlan consultancy services



# Factor 1: EV market maturity

Country	Population 2018	EV registrations <sup>1</sup> (q1-q3 2018)	EV per inhabitant (x1000)	Scoring EV per population	EV market share 2018 <sup>2</sup>	Scoring EV market share	BEV sales 2018 <sup>3</sup>	% of BEV 2018	Scoring BEV Share
Austria	8,822,267	6,125	0.694265998	3	2.27%	2	4486	73%	2
Belgium	11,413,058	10,508	0.920699781	4	2.39%	2	2413	23%	1
Czech Republic	10,610,055	699	0.065880903	1	0.35%	1	469	67%	2
Denmark	5,781,190	3,579	0.619076695	3	2.11%	2	933	26%	1
Finland	5,513,130	4,494	0.815144936	4	5.16%	3	541	12%	0
France	67,221,943	31,113	0.462839939	3	1.95%	2	20256	65%	2
Germany	82,850,000	50,245	0.606457453	4	1.94%	2	24678	49%	1
Greece	10,738,868	231	0.021510647	1	0.29%	1	56	24%	0
Hungary	9,778,371	1,457	0.149002324	2	1.45%	1	867	60%	2
Ireland	4,838,259	1,859	0.38422912	3	1.60%	2	1174	63%	2
Italy	60,483,973	7,208	0.119172066	2	0.55%	1	3580	50%	2
Luxembourg	602,005	604	1.003313926	4	1.90%	2	217.44	36%	1
Netherlands	17,181,084	17,349	1.009773307	4	5.09%	3	15330	88%	2
Norway	5,295,619	52,038	9.826613282	5	52.78%	5	31406	60%	2
Poland	37,976,687	958	0.025226002	1	0.25%	1	411	43%	1
Portugal	10,291,027	5,487	0.533182937	3	3.12%	2	2805	51%	2
Romania	19,523,621	468	0.023970963	1	0.46%	1	58	12%	0
Slovakia	5,443,120	222	0.040785432	1	0.30%	1	40	18%	0
Spain	46,659,302	7,456	0.159796647	2	0.77%	1	3393	46%	1
Sweden	10,120,242	19,949	1.971197922	5	7.60%	4	3983	20%	0
Switzerland	8,482,152	6,491	0.765253912	4	2.99%	2	3503	54%	2
United Kingdom	66,238,007	44,883	0.677601909	3	2.44%	2	11299	25%	0

Sources used:

Eurostat

ACEA

ACEA

ACEA

<sup>1</sup> Definition EV: = BEV + FCEV + PHEV + EREV

<sup>2</sup> Definition market share:  
entire car market; including B2C sales

<sup>3</sup> Definition BEV:  
Full electric vehicle





## Factor 2: Charging infrastructure maturity

Country	#Total public charge plugs	#Total public charge locations	# charging plugs per inhabits (x1000) 2018	scoring charging points per population	# of stations per EV registered	scoring chargestation per EV	# of fast charge locations	% of fast chargers locations <sup>1</sup>	Scoring % fast chargers
Austria	11826	3640	1.340471786	3	1.93077551	2	309	8.5%	1
Belgium	6122	4213	0.536403127	2	0.58260373	1	282	6.7%	2
Czech Republic	1396	464	0.131573305	1	1.99713877	2	126	27.2%	2
Denmark	2610	733	0.451464145	2	0.729253982	1	162	22.1%	3
Finland	2451	602	0.444575042	2	0.545393858	1	126	20.9%	3
France	34558	16456	0.514082135	2	1.110712564	2	1053	6.4%	1
Germany	37405	13043	0.451478576	2	0.744452184	1	1513	11.6%	2
Greece	159	115	0.01480603	0	0.688311688	1	6	5.2%	1
Hungary	1562	590	0.159740308	1	1.072065889	2	74	12.5%	2
Ireland	1160	577	0.239755664	2	0.623991393	1	88	15.3%	2
Italy	8137	3429	0.134531506	1	1.128884573	2	219	6.4%	1
Luxembourg	1171	362	1.945166568	3	1.938741722	2	3	0.8%	1
Netherlands	83196	39617	4.842284689	5	4.795417603	2	792	2.0%	1
Norway	23848	11356	4.503269589	5	0.458272801	1	602	5.3%	1
Poland	850	342	0.022382153	0	0.887265136	1	127	37.1%	2
Portugal	1980	741	0.192400622	2	0.360852925	1	74	10.0%	2
Romania	479	103	0.024534383	0	1.023504274	2	24	23.3%	2
Slovakia	535	185	0.098289216	1	2.40990991	2	83	44.9%	2
Spain	4265	1493	0.091407283	1	0.572022532	1	228	15.3%	2
Sweden	5335	1588	0.527161307	2	0.267431951	1	319	20.1%	3
Switzerland	11089	3691	1.307333328	3	1.708365429	2	244	6.6%	1
United Kingdom	18158	6500	0.274132644	2	0.404562975	1	1502	23.1%	3

<sup>1</sup> Fast charger =  
>22KW



# Factor 3: Government incentives

Country	Purchase Subsidies	Registration Tax Benefits	Ownership Tax Benefits	Company Tax Benefits	VAT Benefits	Other Financial Benefits	Local Incentive s	Infrastructure Incentives	Scoring Government incentives	Scoring driver taxation
Austria		y	y	y	y		y	y	4	5
Belgium			y	y					2	3
Czech Republic		y	y						1	0
Denmark		y		y					1	0
Finland		y	y			y		y	3	3
France	y	y	y	y			y	y	4	0
Germany	y		y	y		y	y	y	4	4
Greece		y	y			y			2	2
Hungary	y	y	y	y			y	y	4	2
Ireland		y	y	y			y		3	5
Italy		y	y				y	y	3	0
Luxembourg			y	y					2	3
Netherlands		y	y	y			y	y	3	5
Norway		y	y	y			y		3	4
Poland									0	2
Portugal	y	y	y	y			y		3	2
Romania	y	y	y					y	3	2
Slovakia	y	y					y		2	2
Spain	y	y	y				y	y	3	3
Sweden	y		y	y				y	3	4
Switzerland			y			y	y		2	1
United Kingdom	y	y	y	y			y	y	4	3

## Explanation: Government incentives

We calculated the net costs for a driver of driving an EV compared with a diesel vehicles.

This is calculated based on the following vehicles:

- EV: Nissan Leaf Acenta (40kwh)
- Diesel: Ford Focus 1.5 titanium business edition

In addition the following assumptions were used:

- Employee drives 50% business, 50% private
- The commuting (home-work) distance is 25km one way
- The gross annual salary of the employee is 60,000 euro
- The employee is married and the spouse has no own income

# Factor 4: LeasePlan maturity



Country	Scoring LeasePlan Charging readiness	Scoring LeasePlan EV orders
Austria	4	2
Belgium	5	1
Czech Republic	1	0
Denmark	5	2
Finland	4	3
France	5	1
Germany	4	1
Greece	2	0
Hungary	2	1
Ireland	3	0
Italy	3	2
Luxembourg	3	2
Netherlands	5	3
Norway	5	3
Poland	1	0
Portugal	5	2
Romania	1	0
Slovakia	1	0
Spain	5	1
Sweden	4	3
Switzerland	3	2
United Kingdom	5	2

## Explanation: LeasePlan Maturity

### LeasePlan Charging Readiness

The countries are ranked according to how well they are able to provide the full range of LeasePlan charging services. This consist of providing, within the lease budget, a home charger, a workplace charger and a charge card for public chargers.

### LeasePlan EV orders

The countries are compared based on EV order intake.

The image features a vibrant orange background with several overlapping, semi-transparent, rounded shapes in various shades of orange and red. The shapes are arranged in a way that creates a sense of depth and movement. In the center-left of the image, the word "LeasePlan" is written in a bold, white, sans-serif font. Below it, and slightly to the right, the phrase "What's next?" is written in a smaller, white, sans-serif font.

**LeasePlan**

What's next?