INTERVIEW

Charging Infrastructure in Transition: Where Viable Business Models Emerge and Where Expectations Prevail

Short interview on customer needs, location logic, operator and service models, as well as international differences in the charging infrastructure market

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Short interview on customer needs, location logic, operator and service models, as well as the strategic importance of local market knowledge in the international charging infrastructure market

Interview with David Bacher

Junior Project Manager | DTO – B2B Research & Strategies

In the interview, David Bacher explains why the profitability of charging infrastructure does not depend solely on the number of installed charging points, what role location, utilization and operator model play, and why international market strategies need to be validated locally.

> "Charging infrastructure succeeds not through the number of charging points alone, but through utilization, location quality and a suitable operating model."

Question: Why is charging infrastructure today more than simply a question of expansion?

Answer: Because expansion alone says nothing about whether infrastructure is actually used. A fast charger on a motorway serves different needs than charging points at a workplace or depot. The key is therefore to understand the specific usage context: Who charges there, how long does the vehicle remain parked, and how reliable is demand? Only when location, grid connection and operations fit this context does a charging point become a functioning offering.

Question: In which segments can particularly viable business models emerge?

Answer: Situations in which demand is highly predictable are particularly interesting. For fleets or depots, for example, it is often possible to estimate quite accurately when vehicles will return and how much energy will be required. High-traffic locations can also be attractive if enough users actually charge there. In the end, however, the segment label matters less than whether usage, pricing and operations fit together economically.

Question: How important are location quality and utilization for economic success?

Answer: Location and utilization often determine whether the business model is viable. A modern charging hub can disappoint economically if it is difficult to reach or hardly fits typical driving and dwell patterns. Conversely, a smaller location can work very well if the same users come regularly. That is why companies should not look only at general traffic figures, but understand how demand actually behaves at the specific location and what alternatives already exist there.

Question: How do the business models around hardware, operations, software and energy differ?

Answer: That is precisely what makes the market so interesting: not every provider earns money at the same point. A hardware manufacturer depends more on the sale and servicing of the technology, an operator on usage over many years, while software or billing providers have yet another revenue logic. A model succeeds when these roles work together cleanly and create a simple, reliable charging process for the user. Unclear responsibilities or complicated interfaces, by contrast, can quickly become a problem.

Question: Why do projects fail despite generally positive market expectations?

Answer: Because strong market growth does not guarantee a good individual project. Business cases often assume rising numbers of electric vehicles, while the actual utilization of a specific location is much more uncertain. Grid connection issues, high ongoing costs or poorly coordinated partners can put additional pressure on profitability. A project should therefore always be assessed for its specific location and target group - regardless of how positive the overall market forecast may be.

Question: What should companies examine before investing in charging infrastructure or entering the market?

Answer: I would first ask: Who is actually supposed to charge there, and why at this particular location? A great deal follows from that. If expected usage is plausible, competition, price levels, cost structure and potential partners can be assessed meaningfully. It is also important to have a realistic reason why users will keep coming - for example, because the location fits their route, a fleet is tied to it, or an additional service provides genuine added value. Only then does a market opportunity become a robust business model.

Question: How do charging infrastructure markets differ globally?

Answer: Very significantly. A concept that works in Germany cannot automatically be transferred to the US, China or Southern Europe. Housing types and private parking alone change how much public charging is needed. There are also differences in electricity markets, grids and regulatory frameworks. Customers also have different expectations by market regarding payment, charging speed and digital services. The technical platform may therefore be internationally scalable, but location strategy, partners and business model need to be validated locally.

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Interviewee

David Bacher

Junior Project Manager | DTO – B2B Research & Strategies

David Bacher has been working at DTO as a Junior Project Manager since 2025. With a master's degree in Applied Cognitive and Media Science with a focus on Business Psychology, he specializes in the structured analysis of complex issues. In the interview, he examines the charging infrastructure market particularly from the perspective of user needs, business models and international market differences.