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Towards Effective Economic Oversight of Electric Vehicle Charging Services in Ghana: Policy and Regulatory Principles

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KEY HIGHLIGHTS

- Ghana's EV charging market is emerging, with PURC's introduction of a dedicated EV charging tariff marking an important first step toward formal economic regulation
- Notwithstanding this progress, existing tariff frameworks remain largely designed for traditional electricity consumption and do not fully capture the unique demand characteristics and commercial structure of EV charging services.
- As the market expands, unresolved regulatory gaps may give rise to risks such as inefficient pricing, localized grid stress, and the potential for market power in areas with limited charging alternatives
- A coherent regulatory approach should be guided by key principles, including regulatory clarity, cost reflectivity, efficient price signals, beneficiary-pays cost allocation, proportionate market oversight, and consumer protection and transparency.
- These principles underscore the need for the development of structured regulatory instruments to support PURC's evolving oversight, including enhanced tariff design, cost allocation frameworks, and consumer protection measures

1. Policy Context And Rationale

This regulatory brief examines the emerging electric vehicle (EV) charging market in Ghana and sets out the policy and regulatory principles necessary to guide the Public Utilities Regulatory Commission's (PURC's) economic oversight of the sector. As EV adoption gradually increases and charging infrastructure begins to develop, the absence of a clearly defined economic regulatory framework presents both risks and opportunities, which necessitates deliberate regulatory positioning within Ghana's electricity sector.

Accordingly, the brief seeks to define the scope of PURC's regulatory role within the EV charging ecosystem by establishing foundational policy principles for its economic regulation. It further identifies key consumer protection and transparency requirements and proposes directions for the development of some regulatory instruments to support the EV market.

To achieve these objectives, the brief draws comprehensively on a desk review of academic literature, policy documents, and industry reports relating to EV deployment and economic regulation. Insights from these sources are synthesized to develop context-specific policy and regulatory principles aimed at fostering an efficient, transparent, and consumer-oriented EV charging market in Ghana.

Ghana's Emerging EV Charging Market Landscape

The EV charging ecosystem in Ghana is emerging and is beginning to constitute a new category of electricity consuming-economic activity within Ghana's power sector. Although the market remains at an early stage, the increasing uptake of EVs and the gradual roll out of charging infrastructure signals a shift in electricity consumption patterns. Unlike conventional electricity use, EV charging services combine electricity supply with infrastructure provision and digital service platforms, thereby giving rise to a distinct commercial service market built around electricity use (Hall and Lutsey, 2017).

Currently, EV charging infrastructure in Ghana is limited, but steadily expanding, primarily within the capital city, Accra, where early adopters and pilot projects are concentrated. Available market assessments indicate that Ghana has approximately seven (7) public EV charging stations nationwide, all of which are located in Accra,[1] despite a government target of 1,000 charging stations nationwide by 2028.[2] These charging stations are operated by a small number of private companies, including iJANU, POBAD International, Porsche Ghana, and Silver Star Tower. Most of the existing charging installations are Level 2 AC chargers, which are suitable for medium-duration charging. Only one publicly available DC fast charger with a capacity of about 60 kW has been identified in the country (UNDP, 2025). While modest, this level of deployment is consistent with the nascent stage of market development.

Notably, recent regulatory developments indicate that the economic dimension of the EV charging market is beginning to receive policy attention. In its March 2026 Quarterly Tariff Review, the Public Utilities Regulatory Commission (PURC) introduced a dedicated electricity tariff line applicable to EV charging services. This represents an important first step toward recognizing EV charging as a distinct electricity end-use category within Ghana's tariff structure.

Regulatory Gaps in Ghana's EV market

Despite these initial developments, the EV charging market continues to evolve without a fully articulated economic regulatory framework. While PURC's introduction of a dedicated EV charging tariff line marks a significant milestone, it remains an initial measure or piloted project which does not constitute a comprehensive framework governing pricing, cost recovery, and market conduct. Existing literature on EVs underscores that the development of a robust EV ecosystem requires coordinated policy and regulatory support, including charging infrastructure planning, consumer incentives, and mechanisms to address pricing and consumer protection concerns (Hall and Lutsey, 2017). While Ghana has made progress in establishing technical and policy foundations for EV deployment, the broader economic regulatory architecture remains underdeveloped.

The Energy Commission, Ghana's technical regulator of the electricity sector, is in the process of finalizing a comprehensive EV Charging Regulation and Framework to govern the installation, safety, and operation of charging systems. Draft regulations covering charging infrastructure and battery swap systems are also awaiting parliamentary approval, while technical standards for charging infrastructure, vehicle and batteries have been developed by the Energy Commission in collaboration with the Ghana Standards Authority.[3] Although these initiatives address licensing, safety, and technical compliance requirements, they do not fully address the economic regulator's issues associated with EV charging services.

To this end, PURC's recent tariff decision provides an entry point for broader regulatory engagement but also raises a number of follow-on questions. These include how the EV tariff will be structured over time (e.g. flat rate vs. time-of-use), the extent to which it reflects underlying cost drivers, and how it will evolve as demand scales. Furthermore, clarity is required on whether the tariff applies uniformly across different charging technologies (AC vs. DC fast charging) and business models. Evidence from a recent market study conducted by UNDP (2025) in Ghana further highlights several structural constraints affecting the growth of the EV charging market in Ghana, including low EV penetration, high upfront capital costs, power reliability concerns, and historically high electricity input costs. Prior to the introduction of the EV-specific tariff line, charging stations were classified under non-residential tariffs, increasing operational costs and affecting commercial viability. While the

[1] Electric vehicle charging points sited in Accra alone - Report (Graphic Online Report, 2025)

[2] Ghana's Electric Vehicle Push Gains Momentum Amid Infrastructure Gaps: expert says (Sino-Africa Insider, 2025)

[3] Energy Commission Board engages on draft EV charging infrastructure regulations. https://www.ghanabusinessnews.com/2026/02/23/energy-commission-board-engages-on-draft-ev-charging-infrastructure-regulations/

new tariff line may help address this constraint, its effectiveness will depend on its design and alignment with market realities.

Beyond tariff design, additional regulatory gaps persist. There are currently no clearly defined rules governing how grid reinforcement or network upgrades required to support EV charging infrastructure should be financed. In the absence of such rules, there is a risk these costs may be socialized across the broader electricity consumer base (Li and Jenn, 2024). Similarly, consumer protection standards specific to EV charging, such as pricing transparency, billing clarity, and minimum service quality, remain underdeveloped. The introduction of a tariff category alone does not address these issues, underscoring the need for complementary regulatory instruments. These gaps point to the need for a more comprehensive and forward-looking regulatory framework. Emerging international practice, supports EV-specific regulatory approaches, including tariff frameworks that reflect time-of-use (TOU) pricing and capacity considerations, beneficiary-based cost allocation rules for network upgrades, and clear service quality and billing standards to manage grid impacts while safeguarding consumers as the market expands.[4]

Following this introduction, Section 2 examines the case for establishing a distinct economic regulatory framework for EV charging services in Ghana, and articulates the rationale for PURC's proactive engagement in this emerging market. Section 3 sets out the core policy and regulatory principles that should guide PURC's oversight of the sector. Building on these principles, Section 4 proposes a set of regulatory instruments that PURC may develop to operationalize its economic regulation of EV charging services in Ghana, including approaches to tariff design, cost recovery, and consumer protection. Finally, Sections 5 and 6 outline the key policy recommendations and the proposed next steps to support the development of a coherent, efficient, and forward-looking regulatory framework for EV charging in Ghana.

2. The Case for Economic Regulation of Electric Vehicle Charging in Ghana

The need for economic regulation of EV charging services in Ghana principally arises because, existing electricity tariff frameworks and regulatory instruments were designed for traditional end-use electricity consumption by households, commercial entities, and industry. Current tariff structures do not fully account for the distinct nature of EV charging services. Emerging evidence indicates that EV charging involves high-capacity demand, particularly with fast chargers, combined with business models that integrate electricity resale, infrastructure provision and digital service platforms (Anggraini et al., 2025). Fast charging, in particular, can generate concentrated demand over short periods, increasing peak loads on distribution networks and if not properly managed through appropriate tariff design and connection policies, this may accelerate the need for costly network upgrades (Li and Jenn, 2024; Diouf et al., 2025).

EV charging thus operates at the intersection of utility regulation, commercial service provision, and infrastructure development, an interface not comprehensively addressed by existing regulatory frameworks in Ghana. Charging operators, while typically private entities, rely on regulated grid infrastructure and influence system costs through their demand profiles. This places them outside the traditional category of passive electricity consumers and raises important questions regarding pricing, cost recovery and the appropriate scope regulatory oversight (Anggraini et al., 2025).

Consumer protection concerns may also arise where pricing is not transparent and billing practices are difficult for users to interpret (Faruqui and Sergici, 2010). Unclear pricing formats and models, non-disclosure of pricing information, and limited dispute resolution mechanisms can create information asymmetries and expose users to unfair charges.[5] Studies on EV charging markets

[4] US Department of Energy (2024). Impact of Electric Vehicles on the Grid. Report to Congress. June 2024

[5] The state of EV charging in America: Harvard research shows chargers 78% reliable and pricing like the 'Wild West'. Havard Business School, June 2024

indicate that inconsistent pricing structures, opaque fee components, and inconsistent charging cost information can confuse users and reduce consumer trust, which may hinder market adoption, particularly in early-stage markets.[6] More broadly, the absence of a structured economic regulatory framework may result in inefficient pricing outcomes that fail to reflect peak demand costs, unintended cross-subsidization where general consumers bear EV-related system costs, and localized grid stress arising from uncoordinated high-load charging (Li and Jenn, 2024; Diouf et al., 2025). While the introduction of a dedicated EV charging tariff line by PURC represents an important initial step toward addressing these issues, it does not, in itself, resolve the broader set of regulatory challenges. Key questions remain regarding tariff structure, cost allocation, consumer protection, and long-term market oversight. Addressing these risks falls squarely within PURC's statutory mandate to ensure fair, transparent, and cost-reflective tariffs, while protecting consumer interests and supporting efficient utility operations. Accordingly, there is a clear need to establish a comprehensive economic regulatory framework tailored to the evolving EV charging market.

Finally, specific tariff design elements such as demand charges, present additional regulatory considerations. Demand charges, which are based on the highest level of power drawn during a billing period, can significantly increase fixed capacity costs for charging operators, particularly, those operating fast charges.[7] At the same time, EV charging infrastructure is often location-specific, with limited alternatives available to users in certain areas. This can create localized market power, enabling operators to exert pricing discretion. The combination of high fixed costs and limited competition may result in inefficient or excessive pricing outcomes (Greaker, 2021). These dynamics collectively justify the need for a structured economic regulatory framework to promote transparent and cost-reflective pricing, protect consumers from exploitative practices, and provide regulatory certainty for investment as the market develops.

3. Economic Regulation of EV Charging: Policy and Regulatory Principles

Drawing on established literature in regulatory economics and governance, this section articulates six foundational principles to guide PURC's economic oversight of EV charging services in Ghana, ensuring that regulation remains efficient, proportionate and responsive to market development.

Principle 1: Regulatory Clarity and Scope

Adapting OECD's (2014) first principle of good governance of regulators, the principal requirement for effective oversight of EV charging services in Ghana is role clarity and clear regulatory classification. That is, recognizing EV charging as a regulated electricity-based commercial service by providing an appropriate legal and economic framework within PURC's mandate. Although charging operators are often private entities rather than licensed utilities, they rely on regulated grid infrastructure and influence system costs through peak demand and network usage. Economic literature on electricity regulation emphasizes that activities that affect network costs and consumer pricing fall within the scope of economic regulation (Joskow, 2008). Thus, a clear classification of the EV charging activity will ensure that pricing practices, cost recovery mechanisms, and service standards remain aligned with principles of cost reflectivity, efficiency, and consumer protection.

Regulatory Implication: This principle indicates that PURC should formally define EV charging as a distinct, electricity-based commercial service within its regulatory remit, establish clear guidelines and economic framework to guide pricing, cost recovery, and service standards as the market scales.

[6] FIA Region I. (2025). Expert study on public EV charging in Europe: Market dynamics and consumer perspectives

[7] Demand Charges & Electric Vehicle Fast-Charging An Intermountain West Assessment October 2021

Principle 2: Cost Reflectivity and Fairness

The principle of cost reflectivity is grounded in established public utility regulation theory (Kahn, 1970; Joskow, 2008; Pérez-Arriaga, 2013). It originates from the economic idea that prices in regulated network industries should reflect the underlying costs of providing the service, including both marginal energy costs and capacity-related network costs. Adapting this principle to EVs implies that tariffs applied to EV charging should reflect the actual costs of energy supply, network usage, and infrastructure provision. In the context of EV charging, this includes energy costs, transmission and distribution network charges, and capacity-related costs driven by peak demand, particularly from fast chargers (Li and Jenn, 2024). Equally important is the principle of fairness in cost allocation (Pérez-Arriaga, 2013). The expansion of EV charging infrastructure may require network reinforcements, transformer upgrades, or new connections. However, if upgrades related to EVs are indiscriminately socialized across all electricity consumers, non-EV users may effectively end up subsidizing EV charging infrastructure. This would undermine tariff equity and public acceptance of electrification policies.

Regulatory Implication: PURC should therefore ensure that EV charging tariffs and cost allocation methodologies are cost-reflective, transparent, and equitable, while preventing cross-subsidization and safeguarding non-EV consumers from bearing EV-specific system costs.

Principle 3: Efficient Price Signals

The principle of efficient price signals is grounded in marginal cost pricing and dynamic electricity tariff theory (Kahn, 1970; Borenstein, 2005; Joskow, 2008; Faruqui and Sergici, 2010). Applying this principle means that an effective regulatory framework for EV charging should incorporate pricing mechanisms that send efficient signals to users about when and how to charge. This principle is operationalized through differential pricing mechanisms such as time-of-use (TOU) pricing, which can encourage consumers to shift consumption to off-peak periods, thereby reducing system stress and improving overall efficiency (Faruqui and Sergici, 2010; Borenstein, 2005). Thus, in the context of EV charging, TOU tariffs can incentivize charging during periods of lower demand, such as at night, when spare system capacity is available. Efficient price signals are also important to discourage peak-time grid stress. Fast chargers, in particular, can create significant localized demand spikes if deployed without coordinated pricing mechanisms (Li and Jenn, 2024).

Regulatory Implication: This principle implies that PURC must use demand-based pricing mechanisms, such as TOU tariffs, as a tool to influence charging behaviour, and to manage grid impacts efficiently.

Principle 4: Beneficiary-Pays Cost Allocation

The beneficiary-pays principle is grounded in established cost-causation theory in public utility regulation. Proponents of this principle argue that the cost of providing service should be borne by the customers or customer classes who cause those costs to be incurred (Matisoff et al, 2020). Applying this principle to EV charging regulation, implies that, grid reinforcements and upgrades occasioned specifically by EV related demand, should be financed primarily by the beneficiaries of those investments. According to Li and Jenn (2024), such upgrades may be required because EV charging predominantly occurs within the distribution grid, where insufficient capacity may lead to congestion and reliability risks, risking power quality and reliability of the local network. Therefore, in cases where such grid upgrades or investments are directly attributable to EV charging demand, allocating costs to charging operators or EV users will help maintain tariff equity and prevent cross-subsidization from non-EV electricity consumers.

Regulatory Implication: This principle implies that PURC must develop transparent methodologies to distinguish between EV specific upgrades and general system investments, and ensure that, EV related grid upgrade costs are allocated primarily to those who benefit from the service. This would prevent cross-subsidization and protect non-EV consumers from unintended financial burdens.

Principle 5: Proportionate Market Oversight

The principle of proportionate market oversight is grounded in regulatory governance and market failure theory (Kahn, 1970; Joskow, 2008; OECD, 2014), and has been applied to EV charging infrastructure in the context of local monopoly risks (Greaker, 2021). Economic regulation of EV charging services should be proportionate to prevailing market conditions. In locations where EV charging infrastructure exhibits characteristics of local monopoly, such that it is only available at distinct locations such as highways or remote corridors, stronger oversight may be necessary to prevent excessive pricing and protect consumers (Greaker, 2021). This necessitates the use of monitoring and information gathering before imposing rigid controls, particularly in such a nascent market where competition dynamics are still evolving (OECD, 2014). Preliminary oversight can focus on data collection, market surveillance, and consumer protection standards, to allow the regulatory framework to adapt as the market matures.

Regulatory Implication: PURC should adopt a phased and evidence-based approach to regulation, prioritizing market monitoring, data collection, and targeted interventions, while retaining the flexibility to introduce stronger controls where market power or consumer risks emerge.

Principle 6: Consumer Protection and Transparency

The principle of consumer protection and transparency is grounded in information asymmetry theory and consumer welfare regulation (Akerlof, 1970; Kahn, 1970) and is reinforced in modern regulatory governance frameworks (OECD, 2014). Consumer protection and transparency are essential components of an effective economic regulatory framework for EV charging services. As EV charging markets evolve, users interact with varied pricing models, digital payment platforms, and different charging technologies. Clear and standardized pricing formats, preferably based on energy consumed such as cost per kilowatt-hour (kWh) would enhance comparability, improve consumer understanding, and reduce the risk of misleading or opaque charges (Hall and Lutsey, 2017). Billing clarity and accessible complaint and dispute resolution mechanisms would further strengthen consumer confidence (Faruqui and Sergici, 2010). Transparent breakdowns of energy charges, network components, and any additional service charges would help mitigate information asymmetry between providers and users.

Regulatory Implication: This principle requires PURC to establish standardized and transparent pricing formats, and develop clear consumer protection and dispute resolution mechanisms for EV charging users. This is important to reduce information asymmetry, protect consumers from unfair pricing practices, and build public confidence as the sector develops.

4. Recommended Regulatory Instruments to Develop for EV Regulation

The proposed regulatory instruments outlined in this section are grounded in established principles of public utility regulation, regulatory governance, and welfare economics. These theoretical foundations justify the development of structured regulatory instruments to operationalize PURC's economic oversight of EV charging services in Ghana.

4.1 Development of EV Charging Tariff Guidelines and Cost Allocation Methodologies

Following the works of Kahn (1970); Joskow (2008) and Pérez-Arriaga (2013), it is important PURC develops tariff guidelines tailored specifically to EV charging services, and ensure cost reflectivity, transparency, and consistency in pricing structures. Given that EV charging differs from traditional electricity consumption in its demand profile and business model, clear guidelines would define allowable cost components, treatment of demand

charges, and pricing transparency obligations. These guidelines should also build on PURC's recent introduction of an EV-specific tariff line by providing a structured methodology for its evolution as the market matures

4.2 Time-of-Use (TOU) Pricing Frameworks

Given that PURC has already initiated steps toward the adoption of TOU pricing, it is important for the Commission to finalize and operationalize this framework to facilitate its effective application within EV charging regulation. Integrating a structured TOU framework into EV charging tariffs would support system reliability and promote more efficient electricity consumption patterns, particularly as fast-charging infrastructure expands. PURC can position TOU pricing not only as a tariff mechanism but as a strategic system management tool to align EV demand with available system capacity (Faruqui and Sergici, 2010).

4.3 Reporting and Disclosure Requirements

Reporting and disclosure requirements are informed by regulatory governance theory, which underscores transparency and accountability as mechanisms for effective oversight (OECD, 2014). To monitor market development and ensure compliance, PURC should establish service quality and billing standards to protect consumers, ensure reliability, and enhance trust in the EV charging market. Regulatory governance literature highlights that data transparency and periodic reporting strengthen oversight and accountability in infrastructure sectors (OECD, 2014). Reporting may include pricing structures, utilization rates, demand peaks, and consumer complaints.

4.4 Service Quality and Billing Standards

As part of its regulatory tools to develop, PURC should establish service quality and billing standards that would protect consumers and enhance trust in the EV charging market. Such standards would reduce information asymmetry and safeguard consumer interests as the market matures (Akerlof, 1970; OECD, 2014).

5. Key Policy Recommendations

Building on the regulatory principles and market gaps discussed in the preceding sections, this section outlines key policy actions that PURC should consider to operationalize its economic oversight of EV charging services in Ghana

5.1 Adopt Formal Policy Principles for EV Charging Economic Oversight

PURC should formally adopt a set of policy principles to guide its economic regulation of EV charging services. These principles, covering regulatory clarity, cost reflectivity, efficient price signals, beneficiary-pays cost allocation, proportionate oversight, and consumer protection, should be clearly articulated in an economic framework document.

5.2 Develop EV Specific Tariff Design Guidelines and Cost Allocation Rules

PURC should develop tailored tariff guidelines for EV charging services that reflect their distinct demand characteristics and commercial models. The guidelines should:

a. Define allowable cost components, treatment of demand and capacity charges, application of TOU pricing, and transparency requirements including differentiation across charging technologies (e.g., AC vs. DC fast charging), where appropriate.

b. Determine how grid reinforcements and connection upgrades occasioned by EV charging demand are financed.

c. Include cost-causation principles to ensure that incremental network costs are primarily borne by charging operators or EV users, except where broader system benefits justify shared recovery.

5.3 Introduce Transparency and Billing Standards Early

To build consumer confidence and prevent future disputes, PURC should introduce standardized pricing formats, clear billing requirements, and accessible complaint and dispute resolution mechanisms at an early stage of market

development. Early intervention in transparency standards will reduce information asymmetry, enhance trust, and support sustainable market growth.

5.4 Implement Proportionate Market Monitoring Mechanisms

PURC should prioritize structured market monitoring and data collection during the early stages of EV market development. Reporting obligations for charging operators should include pricing structures, demand peaks, utilization rates, and consumer complaints ensuring that regulatory intervention remains proportionate, adaptive, and evidence-based.

6. Conclusion and Way Forward

The emergence of EV charging services in Ghana represents a structural evolution of the electricity sector, linking power system operations with the broader transport electrification agenda. While PURC's initial introduction of an EV-specific tariff line marks a critical first step, a more comprehensive and forward-looking economic regulatory framework is required to ensure efficient market development, protect consumers, and support sustainable investment.

To translate the core principles into actionable measures, the following next steps are recommended:

- Initiate structured stakeholder consultations with charging operators, utilities, the Energy Commission, EV consumer groups, and investors to refine the EV tariff design/structure, cost allocation methodologies, and reporting requirements;
- Develop Draft EV tariff guidelines and cost allocation frameworks to guide pricing and investment signals in the sector;
- Establish robust data collection and market monitoring systems to capture information on pricing structures, utilization patterns, demand impacts, and consumer complaints;
- Strengthen institutional coordination with the Energy Commission to ensure coherence in the overall EV regulation framework to minimize regulatory overlaps; and
- Consider piloting EV specific tariff models and monitoring frameworks in selected locations to test their effectiveness before full-scale implementation.

Building on the foundations established in this brief, the next edition of the regulatory brief (Issue RES/004/2026) will focus on drawing comparative lessons from selected African countries that have made notable progress in developing economic regulatory frameworks for EV charging services. The objective will be to identify relevant regulatory approaches, tariff structures, and market oversight mechanisms that can inform the design of a robust, context-specific economic regulatory framework for EV charging in Ghana.

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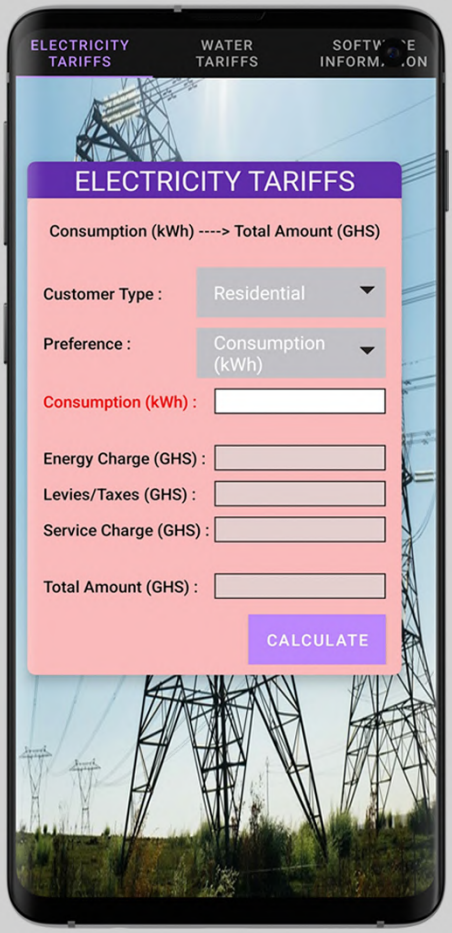

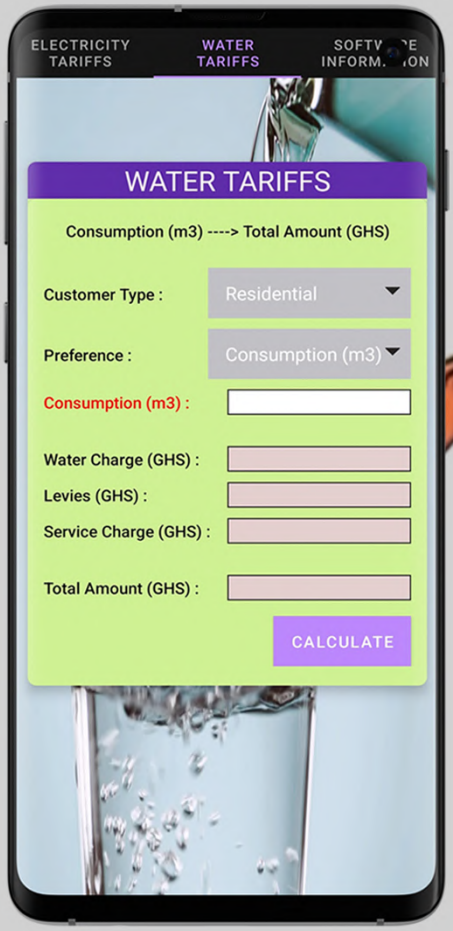

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OUR CONTACTS

HEAD OFFICE
2nd Floor Olympic Committee Building
No. 53, Liberation Road, Ridge
P. O. Box CT 3095Cantonments, Accra
Digital Address: GA-052-9469
Tel: (233-302) 244180, 218300
WhatsApp: (233-558) 082547
Email: info@purc.com.gh
Website: http://www.purc.com.gh

Greater Accra Regional Office
Ground Floor, GNAT Heights
Opposite Zenith Bank, Liberation Road
Tel: (233-302) 240046
WhatsApp: (233-540) 126201

KUMASI
1st Floor Cocobod Jubilee House
P. O. Box 1001, U.S.T
Kumasi, Ashanti Region
Tel: (233-322) 037510
WhatsApp: (233-540) 126202

TAKORADI
2nd Floor, GPHA Credit Union House
Behind Bank of Ghana
P. O. Box AX 1985
Takoradi, Western Region
Tel: (233-312) 024010
WhatsApp: (233-540) 126203

TAMALE
1st Floor, NCA Building
Opposite Regional Coordinating Council,
P. O. Box TL 1870
Tamale, Northern Region
Tel: +233-372) 026380
WhatsApp: (233-540) 126204

KOFORIDUA
Galloway, Near Jubilee Park Koforidua
P. O. Box KF 2781
Koforidua , Eastern Region
Tel: (233-342) 020770
WhatsApp: (233-540) 126205

HO
2nd Floor, GERCO Plaza, Opposite SG-Bank
P. O. Box HP 1373
Ho, Volta Region
Tel: (233-362) 028607
Fax: (233-362) 028608
WhatsApp: (233-540) 126206

SUNYANI
Plot 15/16 South Industrial Estate
Sunyani Maganzine
P. O. Box SY 1003
Sunyani, Bono Region
Tel: (233-352) 021651
(233-352) 021653
WhatsApp: (233-540) 126207

CAPE COAST
First Floor Data Bank Building
Tantri Road
P. O. Box CC 453
Cape Coast, Central Region
Tel: (233-332) 137926
WhatsApp: (233-540) 126208

WA
2nd Floor Stanbic Bank Building
Opposite Societe Generale
P. O. Box 445
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WhatsApp: (233-540) 126210

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1st Floor, Williams Residence
Close to TTH 316
Techiman, Bono East Region
Tel: 0531031443

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