



futurice

Electric 40

Who's who in the EV revolution

Spring 2026

From rollout to resilience: the new face of eMobility

Electric mobility is no longer a fringe story. Nearly half a million new BEVs were registered in 2025, with one in four buyers going electric, a leap that cements the UK as one of Europe's most dynamic EV markets. Public charging infrastructure is scaling in parallel, with nearly 90,000 public charge points now installed across the UK, according to Zapmap. Grants, charging subsidies and EV tax incentives spanning the electric car plug-in grant to home and workplace charge point support have helped sustain demand, while updates to the ZEV mandate offer manufacturers much needed flexibility.

Yet, many industry leaders argue the changes still fall short, as OEMs continue to face mounting pressure under what some describe as "unachievable" targets. This tension is amplified by the EU's recent moves around its 2035 internal combustion engine phase-out and the introduction of mandatory low-emission targets for large corporate fleets.

Behind the headlines, however, the real story is unfolding at the level of **infrastructure and intelligence**. EV adoption means little without robust charging networks, flexible tariffs and smarter battery systems. These are no longer nice-to-haves, they are the foundations for scaling to millions of vehicles without overloading grids or leaving communities behind.

That's why the 2026 **Futurice Electric 40** takes a different tack from earlier editions. Where previous rankings emphasised hardware rollout and visible network scale, this year's methodology leans into **digital integration, systems agility and customer impact** – reflecting the growing importance of software maturity, interoperability and operational resilience across the EV and energy ecosystem.

How the Electric 40 ranking works

The Electric 40 ranks UK eMobility companies, alongside global players operating in the UK, across four core metrics:

- **Market execution:** how effectively a company delivers its solution at scale.
- **Market innovation:** originality in business model and market approach.
- **Technology capability:** the strength and sophistication of its tech offering.
- **Technology impact:** how far its solutions move the needle on the electric mobility transition.

A new market dynamic

In this new digital-first value map, our focus is shifting from the EV itself to the technologies that optimise how vehicles are used, charged and integrated with the grid. This year's number one Electric 40 company, [Axle Energy](#), epitomises that shift.

Founded in 2023, the London-based startup already connects more than [100,000 devices](#) – from EV chargers to home batteries – into UK energy markets. Its one-API approach rapidly turns hardware into grid-responsive assets, enabling households to earn revenue from flexibility with minimal friction.

In second place, [Octopus Energy](#) underlines the importance of reach and consumer simplicity. Now Britain's [largest domestic energy supplier](#), it provides a significant share of the power behind public EV charging. Its [Electroverse](#) roaming platform connects more than one million chargers worldwide, while its new vehicle-to-grid (V2G) ["Power Pack" tariff](#) offers a blueprint for smart, consumer-led integration.

Taking third-place on the podium, [ev.energy](#) has grown from a UK smart-charging app into a global flexibility platform spanning [more than 80% of Europe's major EV and smart-charger brands](#). A September 2025 partnership with [Flexitricity](#) enables UK drivers to trade directly in wholesale energy markets.

With around 47 million customers, [E.ON](#) ranks fourth, proof that not all groundbreakers in today's EV landscape are startups. In the UK, the company announced [six new ultra-rapid hubs in Scotland](#) and piloted a [£20,000 low-carbon home-tech package](#) with zero upfront cost.

Rounding out the top five, [Fastned](#) is defining what premium public charging can look like. With more than 400 locations across Europe, ultra-rapid 400 kW charging speeds, revenues up 44% and a [fresh €200m raise](#) to expand its footprint, it is setting a pace few national players can match.

The AI edge

This year's frontrunners point to a wider truth about the next phase of EV leadership: the deepening convergence of mobility and energy. The companies gaining ground are blending transport infrastructure with intelligent energy systems, turning electrification into a platform, rather than a product.

Data-layer innovator [Volteras](#) illustrates the shift. By stitching together real-time data from more than 30 OEMs, it enables fleets to operate as grid resources. Meanwhile, [Dynamon's](#) predictive software is guiding some of the UK's largest logistics operators through electrification, cutting emissions, while potentially unlocking millions in energy savings. Together, they show how fleet electrification is becoming a proving ground for operational intelligence.

Not surprisingly, AI is now central to this picture. [Eatron Technologies](#) is embedding AI into battery architecture to predict faults before they occur, work that aligns closely with new EU [battery passport regulations](#) on lifecycle data and sustainability reporting.

Blazing a trail with batteries

As the EV market matures, investor focus is shifting from surface-level applications to deep optimisation at the intersection of vehicles, batteries and energy systems. Battery intelligence, in particular, is central to sector resilience.

With Europe setting its sights on [battery localisation](#), British universities continue to lead with cutting-edge ideas. [Breathe Battery Technologies](#) is building a modular software toolchain that enhances battery performance across both EV design and broader energy applications. Then there's [About:Energy](#), a battery modelling startup that is helping operators make faster, more informed decisions around cell selection and lifetime durability. Both spin-outs from [Imperial College London](#), they exemplify the UK's growing influence in a fiercely competitive global field.

Yet, EV adoption remains a game of scale. Mass-market success depends on affordability, keeping incentives such as tax breaks, [salary-sacrifice schemes](#), and price parity firmly in the spotlight.

A new public charge point now appears [roughly every half hour in](#) the UK. But just as critical is the software that connects charging, fleets, and freight into coherent systems, and the trust that makes those systems usable at scale.

Alongside the report, we spoke to some of the leading voices shaping Europe's eMobility future. Chief Content Officer, Presenter and Producer of Fully Charged Show [Imogen Bhogal](#); IONITY's Head of Digital Strategy and Customer Success [Johanna Heckmann](#); Zapmap's Co-founder and COO [Melanie Shufflebotham](#); Energy Park Founder and COO [Gavin Malone](#); EZ-Charge CEO [Philip Shadbolt](#) OBE and Electric Miles Founder and CEO [Arun Anand](#) reflect on how policy, market design and digital infrastructure are redefining EV leadership, shifting the sector from visible rollout to the less visible, but decisive, work of building interoperable, software-led systems that can perform reliably at scale.

The companies featured in this report are rising to that challenge. Whether turning vehicles into grid assets, layering intelligence into batteries or making charging frictionless, each Electric 40 company is working toward an EV future that gives back more than it takes.



David Mitchell
Chief Growth Officer
Futurece

The Electric 40

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1

Axle Energy



Axle Energy claims the top spot in the Electric 40, recognised for its breakthrough in connecting flexible energy assets at scale. With \$9m in seed funding and partnerships with SolarEdge and GivEnergy, Axle's dynamic approach places it centre stage in reshaping the UK grid model.

Founded
2023

Specialism
Home energy flexibility and market integration

Headquarters
London, UK

Website
axle.energy

Axle Energy

A new form of energy flexibility

Our first-placed entrant, Axle Energy opens a new chapter in eMobility by treating EVs not just as vehicles, but as intelligent grid resources. Founded in 2023 and based in London, the company has quickly placed itself at the frontier of domestic flexibility, enabling electric vehicles, home batteries and heat pumps to shift their energy use in response to real-time market signals.

In 2024, it secured \$9m in seed funding, led by Accel with backing from Picus Capital and Eka Ventures. The investment is being used to deepen Axle's market access and expand its partnerships with hardware manufacturers – enabling devices already in homes to participate in local and national electricity markets without user intervention.

The platform works through a unified, modular API. Manufacturers of EV chargers, batteries or solar systems can integrate with Axle and offer customers the chance to earn by flexing consumption or selling spare capacity. It's a compelling proposition that is catching on fast.

100,000 devices, and counting

Just two years after launch, Axle now connects more than 100,000 devices and has landed a string of partnerships that bring flexibility into the mainstream.

In November 2024, Axle launched Flexible Grid Services in partnership with SolarEdge. For the first time, domestic battery owners could earn up to £250 over the winter for supporting the grid at peak times. The initiative built on Axle's earlier collaborations with myenergi, Pod Point, GivEnergy, and Puredrive – all of which now offer Axle-powered flexibility services to EV drivers and battery users. In January 2026, Axle partnered with energy storage manufacturer FoxESS to help customers earn cash from their residential energy products, regardless of their supplier or tariff.



Market execution

Axle has onboarded over 100,000 devices and secured major partnerships.



Market innovation

The startup is pioneering a unified API approach to EV flexibility and OEM integration.



Technology capability

The firm boasts advanced forecasting and multimarket access with DSO and ESO participation.



Technology impact

Axle is making domestic flexibility income-generating and operational at national scale.

Axle Energy

The scale-up is significant. With EV uptake rising and millions of devices now capable of shifting load, the UK energy system is hungry for aggregated, trusted flexibility – and Axle is one of the few platforms turning that into reality, at speed.

Dynamic charging and earning

For EV drivers, Axle's proposition is simple: charge when it's cheap, sell when it's not. Through its partnerships, the platform automates charge times based on grid conditions, enabling vehicle-to-home or vehicle-to-grid exports when prices are high or the grid is under stress. This is where Axle's strength lies. Its platform handles the uncertainty of domestic assets and predicts, via probabilistic models, whether a car will stay plugged in or a battery will have capacity. Using machine learning algorithms, it aggregates those predictions into bids that energy system operators can rely on.

That real-world credibility is already generating revenue. Drivers and households enrolled via Axle-powered services are now participating in the UK's flexibility markets – from local Distribution Network Operator (DNO) trials to Electricity System Operator (ESO) schemes – often without lifting a finger.

Grid balancing in focus

Axle's traction with OEMs may be its biggest strength. By allowing hardware manufacturers to turn products into market-facing assets with a simple integration, Axle helps remove a major friction point in the flexibility landscape. The proof of this came in October 2024, when EV chargers entered the capacity market for the first time, powered by a secondary trade between Axle Energy and Oaktree Power.

The company is expanding its routes to market, developing new revenue-stacking capabilities, and building towards real-time dispatch of distributed assets across different geographies. It's also forging ahead with efforts to shape UK energy policy in support of a greener, cheaper grid. With most of the UK's EV fleet still untapped for flexibility, there's huge potential. The difficulty, as always, is scale. Grid participation needs rules, guarantees and a long list of backend integrations. But Axle is proving that with the right tech, and the right partnerships, flexibility can move the dial from pilot to product.

Drivers and households enrolled via Axle-powered services are now participating in the UK's flexibility markets, often without lifting a finger



Imogen Bhogal

Chief Content Officer,
Presenter and Producer at
Fully Charged Show and
Everything Electric Show

[fullycharged.show](https://www.fullycharged.show)

[LinkedIn](#)

How would you describe the current state of the UK and European eMobility market?

The landscape is becoming far more competitive and complex. One of the biggest shifts we're seeing is the growing presence of Chinese OEMs entering the European market with a very different strategic approach. BYD, in particular, is pursuing brand recognition alongside volume, offering vehicles across almost every price point, from entry-level models through to premium performance. That breadth of offering is something we haven't historically seen from European manufacturers, who have tended to operate within more defined niches.

How significant is that competitive pressure for established European manufacturers?

It's very significant. European OEMs are under pressure to compete simultaneously at both ends of the market. At the same time, some legacy manufacturers are moderating their electrification timelines and continuing to develop hybrid and alternative powertrain solutions, partly as a hedge against evolving legislation and adoption rates that, in some regions, have been slower than initially forecast.

What role does Everything Electric play within the wider eMobility ecosystem?

Our role is centred on consumer education and exposure. Through our YouTube platform, we review EVs and associated technologies, offering honest, independent advice to help people navigate what is still a complex purchasing decision. But our live events are equally important. We run large-scale exhibitions around the world that include extensive EV test-drive programmes.

Electrification is becoming the default pathway for the automotive sector

These events allow attendees to experience a wide range of vehicles in one place, something that simply isn't possible within the traditional dealership model. That breadth of exposure helps build real consumer confidence.

Why are test-drive programmes so influential in accelerating adoption?

Because many drivers still haven't spent any meaningful time in an EV. There's a perception gap that only direct experience can close. When people can compare vehicles side by side, understand charging practically and experience performance first hand, it demystifies ownership. It shifts the conversation from abstract concerns about range or charging to real-world usability.

Where do you see the biggest opportunities for growth and innovation?

There are two major areas. The first is deeper integration with energy services. When households combine EVs with solar generation, battery storage and heat pumps, the financial and efficiency benefits become far more compelling. We've seen examples of fully electrified homes, such as with solar panels, batteries and two EVs, achieving annual energy costs as low as around £120.00, where households are not only not paying a bill but getting paid.

That kind of integrated ecosystem highlights what's possible when mobility and energy are designed to work together. The second opportunity lies in communication. The language around electrification can still feel overly technical or politicised. To reach mainstream consumers, messaging needs to simplify and focus on practical benefits, including cost-savings, convenience and lifestyle improvements, rather than leading with powertrain technology or environmental virtue signalling.

How important are vehicle-to-grid (V2G) and vehicle-to-home (V2H) technologies in enabling that ecosystem?

They're key enablers, although still emerging. V2G and V2H technologies allow vehicles to store and export energy, turning them into active components of the household energy system. That creates opportunities for significant cost-savings and grid flexibility. However, deployment has been slower than expected, largely due to communication protocol challenges between vehicles, chargers and the grid. Once those technical barriers are resolved, uptake is likely to accelerate.

What new business models are emerging as mobility and energy converge?

Energy services are becoming central. One example is the use of LFP batteries in commercial electric trucks, where their high cycle durability allows the same batteries to be repurposed for energy storage at charging hubs. That kind of dual-use model reflects a more strategic approach to energy ecosystems, where vehicles, charging infrastructure and storage assets are designed to work in tandem, rather than as standalone components.

How are regulatory frameworks shaping the competitiveness of the UK and European EV market?

Rules of origin will be hugely influential. To avoid tariffs – typically around 10% – a certain proportion of an EV's value, including battery components, must be sourced within the UK or EU. As these requirements evolve, they create real challenges for manufacturers reliant on globalised supply chains and reinforce the need to develop more domestic production and sourcing capability.

What role could battery recycling play in strengthening regional competitiveness?

Battery recycling is a critical opportunity. Developing the capability to recover and reuse battery materials locally helps create a native supply chain for critical minerals and components. That reduces reliance on imports and strengthens long-term resilience as EV production scales.

Looking ahead, what gives you confidence about the trajectory of electric mobility?

Despite the competitive and regulatory challenges, the direction of travel is clear. Electrification is becoming the default pathway for the automotive sector. As infrastructure expands, energy integration deepens and communication improves, EV ownership will become more practical and financially compelling for a broader audience.

2

Octopus Energy



Octopus Energy comes second in the Electric 40 after strong growth across EV charging, smart tariffs and leasing. It now leads in public charging and runs one of Europe's largest roaming networks. With £2bn funding, and early vehicle-to-grid tariffs, Octopus is reshaping the EV value chain.

Founded
2015

Specialism
Renewable energy and eMobility services

Headquarters
UK

Website
[octopus.energy](https://www.octopus.energy)

Octopus Energy

Driving the charge

Octopus Energy secures the number-two slot following a milestone year in which it tightened its grip on the EV ecosystem. Used by one in four households, [it toppled British Gas](#) to become Britain's [largest household energy supplier](#). From charging and tariffs, to leasing and grid flexibility, its digital-first approach continues to redraw the boundaries of what an energy provider can be.

At the centre is Electroverse, [now Europe's largest EV roaming platform](#), which has been expanding rapidly in the past two years. It connects drivers to [more than 1.3 million chargers worldwide](#), including 80% of Europe's public network, and continues to innovate at pace. In May 2024, it introduced [Plunge Pricing](#), a UK first, which passes on negative wholesale prices to consumers during periods of high renewable generation. Soon after came [Plug & Charge](#), which enables frictionless, card-free charging on compatible vehicles. But reach matters as much as features. In 2025, [InstaVolt](#) switched its 1,700+ rapid chargers to Octopus's green energy supply, while [Addison Lee](#) brought its 2,000-strong London EV fleet on to the platform. [AeroVolt](#) also signed on to support electric aircraft.

Grid-smart by design

EVs are more than transport, they're part of the energy infrastructure. Octopus is one of the few players to treat them as such. Its [Intelligent Octopus Go](#) tariff continues to anchor its smart charging offer, automatically shifting EV charging to off-peak hours. [More than 200,000 customers](#) (roughly one fifth of UK electric car drivers) have signed up to its specialist EV tariffs.

The more radical move comes with [Power Pack](#), a vehicle-to-grid tariff launched in February 2024, which enables free charging in exchange for exporting energy back at peak times. In June 2025, the service was amplified with the launch of the [Power Pack Bundle](#), an Octopus-BYD partnership featuring a leased V2G-ready BYD Dolphin, a bi-directional Zaptec Pro charger and access to free home charging for £300 a month.



Market execution

Octopus Energy manages delivery across charging and leasing at scale and is now Britain's largest domestic energy supplier.



Market innovation

The company has introduced a series of UK firsts, including Plug & Charge and a mainstream V2G/bundle tariff.



Technology capability

Spin-off Kraken Technologies, [valued at \\$8.65bn](#), orchestrates more than 500,000 devices.



Technology impact

Octopus supplies a third of UK public charging electricity and Electroverse is Europe's largest EV roaming platform.

Octopus Energy

Enabling this is Kraken, Octopus's real-time energy entity that underwent a spinoff in December 2025, becoming a standalone company with a valuation of \$8.65bn (and the UK government taking a £25m stake). Octopus sold a \$1bn stake in its AI-based division, responsible for 2 GW of flexible capacity across more than 500,000 devices. Claiming to be the world's largest residential virtual power plant (VPP), Kraken optimises EV load in line with grid conditions – creating a glimpse into how energy systems and transport may co-evolve.

The salary sacrifice factor

Electroverse covers chargers and Kraken balances the grid; while Octopus Electric Vehicles make getting behind the wheel easier and cheaper. In December 2023, it celebrated a £550m securitisation deal with Lloyds Bank, extended by a further £500m in 2025, with a total EV funding of £2bn. Its fleet is now valued at over £450m and it plans to double its size over the next year to around 60,000 cars.

Doing so would make it Britain's biggest provider for salary sacrifice – the tax-efficient benefit that enables employees to lease EVs at a reduced cost. And a September 2024 collaboration with HSBC UK extended the scheme to the bank's influential corporate client base (including PepsiCo, WPP and Luceco).

Smooth operator

Octopus already supplies a third of electricity on Britain's public charging network. It's also recently entered the US – a sign of global intent.

Yet what sets it apart isn't just scale, it's integration. Where others focus on specific areas of the EV ecosystem, Octopus links tariffs, infrastructure and user experience into a single, supercharged bundle.

The mission ahead is continued execution: expanding Power Pack, keeping Electroverse competitive, and ensuring Kraken can support an increasingly complex and global smart grid. But few companies are better positioned to make clean energy work.

Where others focus on specific areas of the EV ecosystem, Octopus links tariffs, infrastructure and user experience into a single, supercharged bundle

3

Ev.energy



Claiming third place, ev.energy has scaled rapidly to become a global leader in smart charging. With more than 120,000 users, \$41m in grant funding and major utility and OEM partners, it is driving affordable, flexible EV charging across Europe and the US.

Founded
2018

Specialism
EV smart charging and virtual power plant integration

Headquarters
UK

Website
[ev.energy](https://www.ev.energy)

Ev.energy

Tapping into grid value

Award-winning B Corp ev.energy has spent the past seven years quietly building one of the world's most connected EV charging platforms. [It now manages over 120,000 drivers across North America and the UK](#), enabling individuals and businesses alike to unlock grid value via scalable and flexible solutions.

The core idea is simple: enable EV drivers to charge at the greenest and cheapest times (saving customers up to [£700 a year](#)), while allowing electricity grids to balance demand. But the execution is increasingly sophisticated. With [direct integrations into car APIs](#) and home chargers, ev.energy's platform automates charging sessions based on real-time grid conditions, electricity prices and user preferences – all while remaining invisible to the end user.

In 2024, ev.energy's [Pando](#) fleet management tool gained traction with logistics and commercial operators in the UK when it unveiled the same smart-charging features at fleet scale.

Affordable access for all

EV.energy oversees more than 120,000 EVs on its platform each day, and institutional backing is helping to accelerate its reach. A [\\$41m grant](#) from the California Energy Commission in 2024 marked one of the largest awards to date for a UK-headquartered energy tech company.

The grant is now fuelling the rollout of [ChargeWise](#), [ev.energy's managed charging programme for US utilities](#), developed in partnership with leading Californian providers including MCE, Silicon Valley Clean Energy and Peninsula Clean Energy. Partners will focus specifically on reaching customers within low-income or disadvantaged communities.

Its broader grid credentials are growing – ev.energy is now achieving demand response and load-shifting services through pilots with [Hawaiian Electric](#), [El Paso Electric](#) and [Clean Power Alliance](#).



Market execution

Ev.energy has forged major partnerships in the UK and US, and is a \$41m grant recipient.



Market innovation

The firm combines solar, fleet and demand response into a unified smart-charging platform.



Technology capability

Ev.energy tech supports V2G, real-time grid response and utility-grade integration.



Technology impact

The company's global footprint is growing fast with market coverage across 80% of Europe's major EV and smart-charger brands.

Ev.energy

The results are promising. So far in the UK, ev.energy's smart charging sparked an average £166 saving for drivers and removed 489 tonnes of CO₂e in the 12 months to May 2025. In California, meanwhile, the same system transferred up to 45% of daytime charging to off-peak times. A trial in the Netherlands is leveraging ev.energy to deliver cheaper EV charging based on real-time market prices (plus solar energy, where available).

Powering real-time reach

One of ev.energy's strengths is its ability to speak the language of both utilities and drivers. The user-facing app supplies automated charging, emissions tracking and real-time rewards, including cash, credits or bill savings. At the same time, the platform generates fine-grained control and analytics to energy providers via a unified API. Its smart-charging engine is supplying real-time flexibility services across local and national markets, helping to ease strain during peak demand and integrate more renewable energy into the grid.

Recently, it partnered JLR on "a seamless, cost-effective smart charging experience". An August 2025 alliance with Volteras followed, paving the way to even wider reach for ev.energy, driven by the energy data platform's OEM integrations and real-time data streaming capabilities. In September 2025, ev.energy and Flexitricity achieved a new milestone enabling EV drivers to participate directly in wholesale power trading, a significant step towards developing a smarter, more flexible energy grid. A January 2026 integration with XPENG vehicles means ev.energy's market coverage now extends to over 80% of Europe's major EV and smart charger brands.

A commanding presence

Ev.energy's technology has now been recognised by the US Department of Energy as part of a multi-vendor rollout of advanced managed charging systems. The \$12m initiative places the startup at the forefront of grid-integrated mobility infrastructure.

In the UK, where it maintains its core engineering base and primary customer footprint, ev.energy continues to work closely with system operators and distribution network operators on smart grid pilots, solar integration and policy alignment. Its public advocacy, including work with BEAMA and the REA, helps craft industry standards on interoperability and data privacy. The next phase of growth will test whether ev.energy's model can continue to thrive in disparate energy markets.

One of ev.energy's strengths is its ability to speak the language of both utilities and drivers ... helping to ease strain during peak demand

4

E.ON



E.ON's fourth placing reflects its growing status in EV infrastructure. With new ultra-rapid hubs rolling out across Scotland, smart EV tariffs and affordable low-carbon tech via E.ON Next, the energy giant is becoming an important partner in propelling the UK towards its 2030 charging targets.

Founded
2000

Specialism
EV infrastructure and tariffs

Headquarters
Germany

Website
[eon.com](https://www.eon.com)

E.ON

Incentivising smart choices

E.ON's UK presence is growing rapidly, focused on ultra-rapid public charging and home energy tariffs that reward smart behaviour. In 2025, it announced plans to install [six new charging hubs across Scotland](#), including 42 ultra-rapid charge points to boost regional access and support the UK government's target of [300,000 public charge points](#) by 2030.

The company also [struck a major partnership with Ohme](#) to offer adjustable charging via the Next Drive tariff. Designed for EV owners who charge overnight, the plan provides rates as low as 6.7p per kWh, enabling drivers to save hundreds of pounds per year while supporting grid balancing.

Soon afterwards, E.ON unveiled Next Gen Home, a package being trialled in the Midlands that sees customers receive [£20,000-worth of low-carbon tech](#) (including solar panels and an EV charger) at zero upfront cost. The aim is to help the public optimise home energy at minimal cost. These innovations build on E.ON's UK retail energy arm, [E.ON Next](#), which already supplies millions of homes.

Bundles for new adopters

With around [47 million customers](#), E.ON's expertise as one of Europe's largest energy companies gives it a unique edge in consumer EV adoption. In collaboration with [Select Car Leasing](#), the company now offers 12 months of free EV mileage in the form of a £134 energy credit for new lease customers – equivalent to around 8,000 miles. The move positions E.ON as an end-to-end partner for drivers transitioning to electric.

While its German base means much of its infrastructure is continental, E.ON's UK strategy is defined by bundling, bringing together energy supply, charging software and smart hardware to make electric driving more convenient and affordable.



Market execution

E.ON has a proven infrastructure rollout to its name, along with a growing UK presence.



Market innovation

The company is known for sound bundling of tariffs, leasing and charging in the consumer and fleet sectors.



Technology capability

E.ON is thriving through its solid infrastructure, grid integration and V2G innovation, secured by high-profile partnerships.



Technology impact

The firm is making a significant contribution to both UK and EU charging growth, through hubs, freight sites and smart tariffs.

E.ON

Freight and fleet electrification

Beyond the consumer market, E.ON is developing dedicated EV charging for fleet and freight users. It recently opened Germany's [first e-truck charging station](#) at the Port of Hamburg, and operates similar sites in Sweden and Denmark, with further UK sites under consideration. These locations feature 400 kW charge points capable of powering articulated lorries, and are designed to reduce logistics sector emissions. In a separate move, E.ON partnered [Deutsche Bank](#) to simplify EV reimbursements for corporate fleet clients, highlighting its focus on B2B electrification.

Cross-border leadership

With access to more than [500,000 EV charging points](#) across 14 European countries, E.ON operates one of Europe's most extensive charge point networks. Germany remains its core market and, in autumn 2025, it joined forces with BMW Group to unveil Germany's first [commercial V2G service](#) for private customers. The plan is to integrate the technology into a wider energy platform that intelligently connects charging infrastructure, heat pumps and smart home systems.

The UK is another key growth area alongside Sweden and Romania. In Romania, E.ON launched the country's [largest EV charging hub](#) in 2025 as part of the EU-funded DRIVE-E initiative, which aims to install 1,400 charging stations across 13 countries by 2027. The site features 50 chargers ranging from 11 kW to 300 kW and demonstrates the scalability of E.ON's public-private partnerships. Closer to the UK, its [German-Danish border project](#) adds 36 charging points – including ultra-rapid units – supporting tourism and long-distance EV travel.

Buoyed by [positive nine-month results for 2025](#) (marking a 10% EBITDA growth), E.ON's next challenge will be standing out in a fragmented UK charging market where regional operators, mobility specialists and energy companies are all competing for scale. But its ability to tie charging directly to energy retail – and offer compelling tariffs – makes it a powerful player in both domestic and fleet electrification.

E.ON's ability to tie charging directly to energy retail – and offer compelling tariffs – makes it a powerful player in both domestic and fleet electrification

5

Fastned



Fastned continues its rise as a pan-European fast-charging leader, earning the number five spot. With 44% revenue increase in Q4 2025, a new €200m raise and a surging European footprint, the company shows that scale and sustainability can power EV growth.

Founded
2012

Specialism
Fast-charging infrastructure

Headquarters
The Netherlands

Website
fastnedcharging.com

Fastned

Charging into the UK

Fastned is one of the few European charging specialists with a high-calibre expansion strategy that includes significant UK investment. In 2024, the company announced a landmark [£30m joint venture](#) with Places for London to build 25 high-powered hubs across the capital. With a station already in place in one of London's busiest ultra-rapid charging hubs at Greenwich, and plans under way to develop the UK's [first fully indoor ultra-rapid charging hub in Aberdeen](#), Fastned is embedding itself into the UK's charging fabric.

Its presence in the capital marks more than just infrastructure, it signals ambition. Fastned's UK team is collaborating closely with transport authorities and local development bodies to streamline planning approvals (as seen in the venture with Places for London) and bring ultra-rapid public charging hubs to scale. The company is also exploring future opportunities in [grid integration schemes](#) with a view to adding flexibility into its deployment strategy.

This momentum builds on a strong European footprint spanning nine countries. Fastned now operates [406 fast charging stations](#) across Europe (January 2026), including 60 new openings in 2025 and the arrival of its first sites in Italy and Spain. New Fastned stations also launched in Belgium, France, Germany and Switzerland as the company aims to achieve 1,000 fast charging stations across Europe by 2030. In addition, Fastned recorded [a 44% increase in Q4 2025 revenue](#), alongside record quarterly highs in renewable energy delivered.

Funding and partnerships

Fastned's growth is fuelled by strong investor confidence. In January 2026, it secured [€200m in new financing](#) to accelerate its expansion across Europe. This follows a record €39m in a third bond issue of 2025, taking its total to [€110m in funding](#) through its retail bond programme in one year alone. The company also signed a second corporate power purchase agreement (PPA) with Ecorus for a 25 MWp solar park to power its stations and, in Germany, it won a major slot in the prestigious [Deutschlandnetz tender](#) to expand its network.



Market execution

Fastned's record revenues, €200m financing, significant bond issuance and new UK partnerships signal strong performance.



Market innovation

The firm's integrated solar/storage hubs and roaming integrations boost usability and sustainability.



Technology capability

Fastned's ultra-fast chargers (up to 400 kW) and proprietary station design are well matched to EV trends.



Technology impact

The company has achieved impressive charging capacity, along with a strategic role in urban transport infrastructure.

Fastned

In April 2025, Fastned became a founding member of the [Spark Alliance](#), now [ChargeLeague](#), aimed at making EV ownership easier than ever under the umbrella of a central, and frictionless, charging network.

Strategic partnerships are central to Fastned's UK growth. Alongside its Places for London joint venture, Fastned is [working with landowners and developers](#) to host and accelerate deployment of ultra-rapid charging sites across key locations. [The company's ability to pre-finance construction and offer ultra-fast charging speeds of up to 400 kW](#) give it an edge in public infrastructure tenders.

Developing an edge

Technology-wise, Fastned is doubling down on speed, scale and renewables. Its signature yellow-roofed stations are increasingly [integrating solar generation and energy storage](#) alongside ultra-rapid chargers. These 300–400 kW stations are designed for reliability and ease of use, catering to next-generation EVs with high-charge capacities. Fastned has also leaned into digital services, including real-time availability through apps and roaming integrations with partners such as [Octopus Electroverse](#). This makes its network one of the most accessible across the continent.

A born disruptor

Fastned is increasingly shaping the European charging landscape. With ambitious targets in sight, the company is betting on scale, speed and experience. In parallel, it also aims to provide “Europe's most reliable, convenient and joyful charging experience”.

In the UK context, its partnerships and planning wins put it ahead of many domestic players. As the UK looks to scale up charging infrastructure to meet 2030 internal combustion engine (ICE) phase-out goals, companies like Fastned will play a vital supporting role.

Fastned has also leaned into digital services with partners such as Octopus Electroverse. This makes its network one of the most accessible across the continent



6

Breathe Battery Technologies

Breathe Battery Technologies, a spinout from Imperial College London, is reshaping EV charging through smarter battery software. In 2025, it raised \$21m and signed a flagship deal with Volvo Cars. With its large independent battery testing facility, it is becoming a key optimisation platform within the global battery ecosystem.

Founded
2019

Specialism
Physics-based battery management software

Headquarters
London, UK

Website
breathebatteries.com

Breathe Battery Technologies

Smarter charging, longer life

Breathe's core product, [Breathe Charge](#), moves beyond static lookup tables by using real-time, physics-based algorithms to optimise charging. Its software dynamically adjusts current based on battery health, temperature and cell state, aiming to enable faster charge times without accelerating degradation. Unlike conventional battery management system software that relies on fixed charging profiles, Breathe's system adapts continuously to the condition and usage of individual cells.

This pitch gained traction at the start of 2025, when Volvo Cars confirmed it would embed Breathe software into its upcoming [ES90 electric sedan](#). The software enables the car to charge from 10% to 80% in just 20 minutes, a milestone more commonly associated with luxury EV models. While fast-charging makes headlines, Breathe's real value lies in how it extends the battery cycle life, helping OEMs hit performance targets without changing cell chemistry or pack design.

Pushing performance further

In May 2025, Breathe closed a [\\$21m Series B round](#) led by Kinnevik, with continued backing from Lowercarbon Capital and Volvo Cars Tech Fund, to support its evolution into a broader battery software platform.

Alongside [Breathe Charge](#), the company launched three products in 2025: [Breathe Model](#), a simulation tool; [Breathe Map](#), for live fleet performance monitoring; and [Breathe Design](#), which helps manufacturers validate new configurations faster. These innovations form a modular stack – an expanded software toolchain – that's already in use across multiple chemistries and cell formats, with traction building in both EV and stationary storage markets.



Market execution

Breathe's new Volvo partnership, product expansion and Series B funding show strong momentum.



Market innovation

The company's physics-led, software-only approach to battery management sets it apart.



Technology capability

Breathe is supported by robust test labs, live data models and embedded OEM integrations.



Technology impact

The startup is still in the early stages of mass deployment but it is influential in OEM charging strategies.

Breathe Battery Technologies

London innovation factories

What makes Breathe stand out are its two London labs (dubbed “[innovation factories](#)”), which now host more than [696 battery test channels](#), including 150 automotive-grade lines, and log more than 2 million hours of cell-testing data. That dataset is incorporated into [Breathe’s modelling pipeline](#), enhancing its ability to forecast thermal behaviour, degradation trends and charging dynamics. The pitch to OEMs is compelling: rather than pursue major battery redesigns, harness [software calibration](#) to extract better performance from existing cells. In a context of ecosystem consolidation, regulatory constraints and evolving chemistries, [Breathe](#) offers a path to performance gain without starting from scratch.

In 2025, Breathe [expanded its London lab sites](#) with the addition of 6,000 square feet of laboratory capacity boasting new areas of expertise. The move came in response to customer demand for a larger range of battery simulation products.

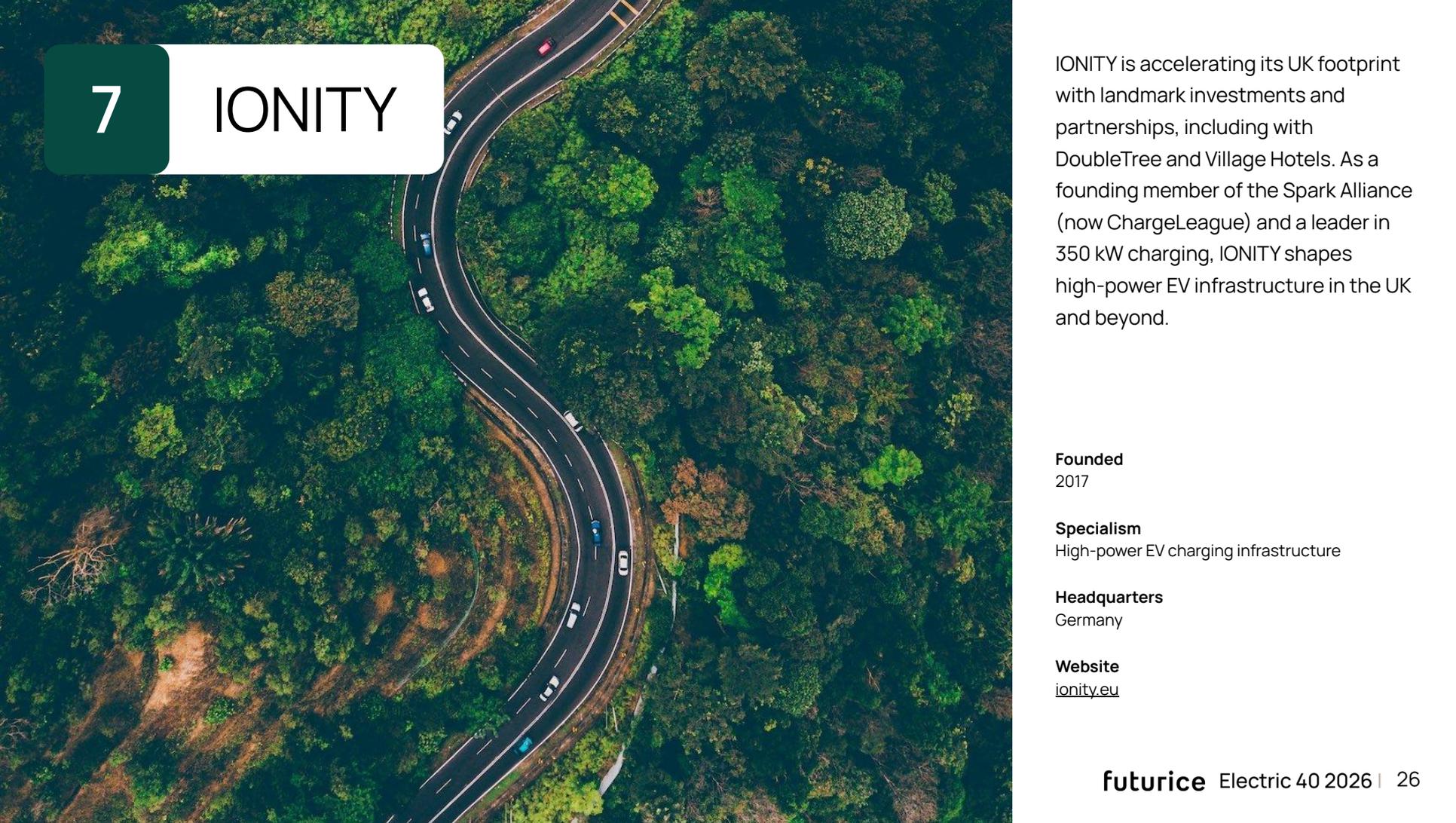
Cell intelligence by design

While automotive is the near-term focus, Breathe is already branching out. [Its modular architecture](#) gives it flexibility across both embedded and [over-the-air applications](#) – useful for partners integrating battery intelligence into broader energy systems. Bang & Olufsen is one such brand now using Breathe’s software to [enhance battery longevity](#) within audio products and beyond.

The company has more than doubled its London footprint and is hiring across embedded systems, battery physics and software engineering. [It continues to position itself not as a consumer-facing brand but as an invisible layer of intelligence](#) inside next-generation battery platforms.

Breathe’s task now is to secure full production rollouts, particularly with second- and third-tier OEMs. As cell design stabilises, and battery management systems become a battleground for competitive advantage, the opportunity is clear: to optimise rather than reinvent and make battery control a software-defined asset class.

What makes Breathe stand out are its two London labs, which now host more than 696 battery test channels and log more than 2 million hours of cell-testing data

An aerial photograph of a winding asphalt road that curves through a dense, lush green forest. Several cars are visible on the road, including a red car, a blue car, and a white car. The road has white dashed lines and a solid white edge line. The forest is thick with various shades of green trees.

7

IONITY

IONITY is accelerating its UK footprint with landmark investments and partnerships, including with DoubleTree and Village Hotels. As a founding member of the Spark Alliance (now ChargeLeague) and a leader in 350 kW charging, IONITY shapes high-power EV infrastructure in the UK and beyond.

Founded
2017

Specialism
High-power EV charging infrastructure

Headquarters
Germany

Website
ionity.eu

IONITY

Driving domestic demand

IONITY may be best known for its pan-European motorway network, but its vision now extends far beyond the autobahn. The joint venture – [backed by BMW, Ford, Hyundai, Kia, Mercedes-Benz, Volkswagen Group and BlackRock](#) – is targeting rapid expansion in the UK, with a string of major infrastructure projects designed to meet growing domestic demand for ultra-fast EV charging.

While its UK footprint remains modest in absolute terms, the company has clearly entered a new growth phase. In February 2025, it launched its largest-ever UK charging hub at [Dartford's DoubleTree by Hilton](#), featuring 24 chargers delivering up to 350 kW each. It's the first of six planned sites in partnership with Henderson Park, expected to add 104 ultra-rapid charge points across key motorway locations including Coventry, Bristol North and Edinburgh Airport.

This builds on an earlier deal with [Village Hotels](#), which will bring 380 charge points to 33 hotel sites across England, Scotland and Wales. The move marks a decisive shift into more urban and semi-urban destinations, in line with IONITY's broader strategy under CEO Jeroen van Tilburg to move "beyond the motorway" and improve access in daily-use areas. IONITY also opened a 24-charger hub at [the Hilton Leicester](#) in July 2025 as part of a Valary Hotels partnership.

A funding record

Backed by some of the world's largest automakers, [IONITY](#) already operates more than 700 charging stations and 5,000 HPC charge points across 24 European countries. In April 2025, it became a founding member of the Spark Alliance, now [ChargeLeague](#) – a cross-border coalition with Atlante, Electra and Fastned – designed to generate a fluid, pan-European charging experience by integrating back-end systems, pricing and roaming agreements.



Market execution

IONITY has a modest UK footprint to date but recent deals suggest that a significant ramp-up is imminent.



Market innovation

The company's strong alliances (ChargeLeague) and urban pivot signal a powerful shift in strategy.



Technology capability

IONITY deploys high-power hubs using Alpitronic HYC1000 hardware that can charge up to eight vehicles simultaneously.



Technology impact

IONITY's larger UK hubs, fleet access and roaming partnerships are helping to make ultra-fast charging simpler to find and use.

IONITY

Financially, IONITY now has firepower to match its aspirations. In May 2025, it secured a [€450m green loan](#) from nine banks, with the option to extend to €600m. The investment will be used to deploy 1,000 new ultra-fast charging sites across Europe, with a significant share expected to land in the UK as planning permissions accelerate. The aim is for IONITY to expand its network to more than 1,300 charging sites by 2030. As part of this uptick, IONITY has unveiled [competitive discounts](#) on its annual plans for ultra-rapid charging in the UK.

First and fast

IONITY's offer hinges on high-power performance and reliability. Its latest chargers use the [Alpitronic HYC1000 system](#) (making IONITY the first charge point operator to procure the hardware for rollout across its system). This enables up to eight vehicles to be charged at the same time, with vehicles able to charge up to 300 kilometres of range in under eight minutes, dramatically reducing drivers' waiting time.

All electricity within IONITY's network comes from 100% renewable energy, reinforcing its sustainability credentials. In March 2025, it launched [IONITY Fleet](#), featuring RFID cards with instant charging for businesses. A full relaunch of its app was planned for late 2025, with improved UX, smart routing and real-time availability.

IONITY has also extended partnerships with retail and hospitality leaders, including [Starbucks](#), [Circle K](#) and [L'Osteria](#), further embedding its charging proposition into consumer-centric locations and diversifying its footprint.

Building brand trust

As the market matures, IONITY will need to invest in visibility, customer experience and pricing transparency to convert latent capability into everyday relevance for UK drivers.

And, for all its firepower, IONITY's UK network is still playing catch-up. But what sets IONITY apart is strategic cohesion and financial depth. Backed by industry giants, it has both the capital and the cross-border partnerships to scale quickly and set the standard for ultra-rapid charging across Europe.

IONITY has both the capital and the cross-border partnerships to scale quickly and set the standard for ultra-rapid charging across Europe



**Johanna
Heckmann**

Head of Digital Strategy
and Customer Success,
IONITY

ionity.eu

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How would you describe the current state of the UK and European eMobility ecosystem?

The ecosystem is growing and strengthening fast, and we can see that in the confidence of consumers. Just last month [January 2026] it was announced that EVs outsold petrol cars in the EU in 2025 for the first time ever.

With that said, charging infrastructure needs to keep pace with the uptake of EVs. The priority is making high-power charging accessible and reliable, so electric driving feels fast, seamless and simple in everyday life.

IONITY operates across 24 European markets and just announced its 700th UK charger in Strathclyde – meaning that we've doubled the size of our UK network for the third year running. It's our mission to provide open, high-power charging for all brands of electric car.

How has the market matured since the early rollout phase?

The landscape is evolving beyond pure scale. Business models are becoming more mature and refined. The industry is moving from a startup phase into a more professional phase. Decision-making is becoming more structured, as operators move from "learning by doing" to running networks based on years of operational data and experience. Some consolidation is already under way.

Mobility will become more interconnected with sectors such as heating and power

Where do data and AI make the biggest difference today?

Data and AI influence the whole value chain. They support growth decisions like scouting locations, deciding where to expand and understanding what power levels are needed at specific sites. They also support day-to-day operations by improving reliability and uptime, which is increasingly important given regulatory expectations in markets like the UK. Operational use cases are strongly focused on prediction, including predictive maintenance, failure analysis and resolving issues remotely, where possible.

How are customer expectations changing, and how are you responding?

Customer experience is becoming more seamless and integrated into everyday routines, often through collaborations with big technology platforms.

For example, Apple Maps integration helps drivers find charging directly in the app.

We are also using AI to improve customer interaction and support, including an AI chatbot to help customers select tariffs and stations, and self-service features such as automated invoice downloads within the app.

What innovations are you most focused on next?

Dynamic pricing is a key area of focus, where automation and AI will be used heavily. While prices are relatively stable today, the ambition is to adjust tariffs more dynamically based on market conditions and customer needs, while keeping it fair and transparent – similar to how pricing works in the fuel industry.

What are the biggest challenges for operators right now?

The market is highly dynamic. Regulatory requirements and reporting standards are changing quickly, and interfaces and data streams from vehicles are evolving, too. Operating across 24 European markets adds complexity because each market has its own ecosystem and requirements. Having internal IT systems helps with flexibility, but translating constant change into a strong customer experience demands real agility in architecture and operations.

What do you need from government and regulators to accelerate rollout?

We need commitment, clarity and a long-term strategy for the transition to renewable energy and electric mobility. Uncertainty, including the ongoing debate surrounding the phasing out of new internal combustion registrations, unsettles the market and slows investment.

It is also important to streamline and harmonise planning and permission processes across Europe, which are currently lengthy, inconsistent, and can block fast infrastructure rollout. Digitalising administrative processes, such as grid connection applications, is an important lever as EV adoption approaches a tipping point.

How important are standards and interoperability in speeding up the transition?

They are crucial. Common communication and technical standards, such as ISO 15118, and roaming protocols, like the Open Charge Point Interface (OCPI), reduce complexity and help the market scale faster.

How do you expect the ecosystem to evolve over the next five years?

Mobility will become more interconnected with adjacent sectors such as heating and power, with greater collaboration around an overarching power infrastructure. There is huge efficiency potential in that convergence. Charging experience should also become leaner and more seamless and we will likely see further consolidation, though not to the extreme levels seen in the fossil fuel industry because electricity markets work differently.

What's your view on vehicle-to-grid and local storage?

Vehicle-to-grid is an exciting efficiency opportunity, particularly for home and workplace charging where vehicles are parked for longer. As a fast-charging operator, our model is less directly affected by vehicle-to-grid applications. We are exploring how the network can optimise energy purchasing, including through virtual energy networks, and are considering the role of local storage in operations.



8

Volteras

With \$11.1m raised and 30-plus OEMs on board with its vision, Volteras is becoming a central player in the zero-emissions industry. Volteras' skill set includes smart fleet integrations, remote diagnostics and real-time energy services, brought together by a deep commitment to interoperability.

Founded
2020

Specialism
Electric vehicle data integration

Headquarters
London, UK

Website
volteras.com

Volteras

Differentiating through data

Volteras is emerging as a key player in the EV ecosystem. It aims to act as the “connective tissue” between EVs, chargers, batteries and energy services, without adding any new hardware. In May 2025, that vision secured the company [\\$11.1m of Series A funding](#), led by Union Square Ventures. Existing backers Exor Ventures and Long Journey Ventures were joined by WEX and Edenred, two of the largest fleet card providers globally. Their investment positions Volteras as a key enabler in the transition to electric fleets.

Volteras has now connected to more than 30 major OEMs, including Mercedes-Benz, BMW, Ford, [Volkswagen Group AG](#) and Stellantis. That breadth gives it an advantage in a market still constrained by fragmented data and infrastructure.

A cross-functional champion

Rather than retrofit hardware or dongles, [Volteras provides a cloud-based API that connects directly to a vehicle's existing systems](#). This allows fleets to onboard and monitor performance in real time across brands and vehicle types. [Hitachi ZeroCarbon](#) is now using the platform to support a new charging management service, enabling its customers to electrify with minimal disruption. Meanwhile, [Octopus Electric Vehicles is tapping into Volteras](#) to optimise leasing and charging propositions across its growing fleet.

What sets Volteras apart is its commitment to interoperability. It doesn't just serve one client category: the platform is already supporting energy retailers, mobility providers, OEMs, leasing firms and insurance companies, creating the kind of data fabric needed for a cohesive electric transition. In that sense, its comparison to [Plaid](#), the fintech data integrator, is well earned.



Market execution

Volteras has proven traction with major fleets, energy companies and OEMs.



Market innovation

The firm's API-based EV integration across more than 30 OEMs give it a clear advantage.



Technology capability

Volteras offers strong and secure cloud architecture but is still building ecosystem depth.



Technology impact

The company influences EV data strategy for partners such as Stellantis and Octopus.

Volteras

This approach is already paying dividends. Mobilisights, Stellantis' data services division, is now working with Volteras to expand access to permissioned vehicle data across new verticals. That includes everything from usage-based insurance to predictive maintenance and EV-focused tariffs.

Experimentation and compliance

Internally, 2025 was a year of build-out. Volteras expanded its product and data-analytics focus and is beginning to deliver embedded insights using vehicle telemetry, for example, through partnerships with ev.energy and Rightcharge, enabling smart charging optimisation and home-charging reimbursement powered directly from the vehicle. Its API now provides real-time EV and charging data to partners, laying the foundation for in-vehicle dashboards and reimbursement tools as it scales.

Volteras is also exploring potential integration with solar and storage partners to support emerging use cases, like V2G functionality. The company is currently in the process of creating "virtual connective tissue" to help EVs return or sell energy back to the grid. Such integrations will be critical for powering true smart energy services for fleet and residential users alike.

Volteras closed 2025 by achieving its ISO/IEC 27001 certification: the internationally recognised standard for information security management. By placing robust data governance at the centre of its operations, and enabling secure access to real-time vehicle and energy data from over 30 OEM partners, the company is positioning itself as a trusted player in the fast-evolving regulatory landscape shaped by the EU Data Act.

In the longer term, Volteras' success will depend on continuing to scale strategically behind the scenes, enabling the next generation of connected, decarbonised mobility without requiring customers to change the way they work. Its main issue will be growth across multiple geographies, while maintaining security, compliance and real-time performance. But if it pulls it off, Volteras could underpin the next wave of EV fleet services in the UK and beyond.

Volteras has now connected to more than 30 major OEMs, giving it an advantage in a market still constrained by fragmented data and infrastructure



9

HIVED

All-electric parcel delivery firm HIVED is growing fast. After raising \$42m and expanding into new depots and cities, it has delivered more than 6.5 million parcels for brands, such as Zara and John Lewis, since launching in 2021. Its electric-first model makes HIVED a rising force in zero-emission logistics.

Founded
2021

Specialism
Electric parcel logistics

Headquarters
UK

Website
hived.space

HIVED

The future of delivery

HIVED's pitch is simple: start with electric, design from scratch and deliver better. The London-based startup has built one of the UK's more distinctive parcel-delivery networks: electric-first, driver-friendly, data-led and designed for scale.

This model is significant because it demonstrates how electrification can be hardwired into logistics rather than layered on top. HIVED's decision to prioritise EVs from inception has enabled the company to optimise routes, infrastructure and energy use with electric drivetrains in mind. This not only improves cost-efficiency but also reduces urban air pollution and noise, reinforcing the value of EV-first delivery networks in dense UK cities.

In July 2025, [HIVED raised \\$42m](#) led by NordicNinja, with participation from Wex Venture Capital, Bain's Future Back Ventures and others. The new capital is supporting continued network growth. In May 2025, HIVED opened a flagship depot in West London at [SEGRO Park Hayes](#), designed to handle up to 40,000 parcels a day. Its middle-mile fleet expanded with the acquisition of [11 Mercedes-Benz eActros trucks](#), a rare move for a logistics player of its size, and last-mile operations have now supported more than 6.5 million parcel deliveries across Greater London.

Parcel power with HIVEDMind

HIVED positions itself not only as an electric delivery company but also as a performance-led one. The company reports [a 99% on-time delivery rate](#). Its proprietary HIVEDMind platform uses real-time data and AI to manage everything from driver scheduling to customer notifications.

Customer experience remains central to the offer. The system has reduced "Where is my order?" queries [by over 90%](#), driven by more transparent updates and tighter delivery windows. High-profile clients include [Nespresso](#), [John Lewis](#), [Uniqlo](#) and [Zara](#). [Nespresso](#) now uses HIVED exclusively for its London deliveries.



Market execution

HIVED is responsible for more than 6.5 million Greater London parcel deliveries, 99% on time, with expansion into new UK cities.



Market innovation

HIVED is leading the way as one of the UK's first fully electric logistics platforms at scale.



Technology capability

The HIVEDMind platform is impressive and its backend integrations are still scaling.



Technology impact

HIVED is focused on reducing parcel emissions, while providing strong client performance.

HIVED

Growth on the inside

Despite its rapid growth, HIVED has maintained a strong internal culture. Around 20% of its more than 120-strong team joined initially as drivers, reflecting [the newly certified B Corp's](#) emphasis on inclusive hiring and career development. The company has also strengthened its leadership team, hiring former executives from [Amazon](#), [DHL](#) and Deliveroo to support operational scaling and routing optimisation.

In July 2024, [HIVED teamed up with The Tyre Collective](#) to address non-exhaust emissions, the particulate pollution generated by tyre wear.

Looking beyond London

[HIVED's model is now rolling out beyond the M25](#). As of the end of 2025, its delivery service is available in [eight new cities and towns](#), including Bristol, Brighton, and Portsmouth, with Birmingham and Manchester to follow in 2026. The startup believes that its "depot-first" approach – securing high-throughput urban hubs and layering in e-vans, bikes and AI optimisation – can be extended nationwide, with coverage in multiple UK locations.

The company continues to focus on ecommerce, particularly mid-sized retailers underserved by larger logistics firms. Its tech stack enables tailored integrations with ecommerce platforms and inventory systems, which could offer a competitive edge in a fragmented market. A recent [collaboration with TEG](#), gives users on the transport and logistics platform instant access to HIVED's 100% electric fleet.

Zero-emission logistics

HIVED aims to demonstrate that zero-emission logistics can compete not just on sustainability, but also on performance and cost. In a sector where electrification is often bolted on to legacy systems, it offers a model built natively around clean mobility, data intelligence and customer experience.

The next challenge is expansion. Scaling into less dense regions could test the efficiency of its London-centric model. But if HIVED succeeds in replicating its approach in new cities, it could provide a viable blueprint for zero-emission last-mile delivery at scale.

If HIVED succeeds in replicating its approach in new cities, it could provide a viable blueprint for zero-emission last-mile delivery at scale

10

Fuuse



Enterprise EV charging platform Fuuse quadrupled in size in 2025. It now serves more than 100,000 active users and 750 clients and processes enough energy, annually, to power the UK for an hour. With enterprise-grade software and grant-backed trials, it positions itself as a trusted operations partner.

Founded

2021

Specialism

Charge point management and energy optimisation

Headquarters

Lancaster, UK

Website

fuuse.io

Fuuse

Making infrastructure the hero

EV infrastructure is often overlooked in favour of flashier front-end services, but Fuuse has made it the core of its business – with enterprise-grade software now supporting more than 750 clients across the UK and Ireland, including SSE, Scottish Power, Siemens and British Airways.

In October 2025, the company closed a £6m investment round from existing investors YFM Equity Partners and Par Equity, following an earlier £8.7m raise in June 2024. The investments accompanied a period of rapid expansion. Fuuse more than doubled recurring revenues since its last raise, and made strategic acquisitions such as Everyday EV's assets. It also marked a seismic 400% growth in the 12 months to June 2024, and now serves more than 100,000 active users.

The platform is designed as an open, hardware-agnostic operating system for enterprise and fleet charging – enabling clients to manage usage, set tariffs, monitor energy loads and integrate with building systems. Fuuse claims that its infrastructure now processes enough electricity annually to power the UK for one hour, underlining its growing role in charging operations.

While many startups target consumer markets, Fuuse has remained focused on B2B, building relationships with utilities, councils, universities and corporates. It recently launched a new automated home charging reimbursement service for fleet EV drivers, to make the process a “more feasible, straightforward option” for public and workplace fleets. This corporate positioning differentiates it from more consumer-led entrants, providing a more predictable growth trajectory.

Flexibility on the grid

Fuuse is also testing how EV infrastructure can support wider energy systems. It is working with EDF and Veolia on V2G projects that enable fleet and depot operators to return energy to the grid during peak demand. These are part of trials, backed by UK Research and Innovation (UKRI) and Innovate UK, aimed at evaluating the potential of EV assets as balancing tools.



Market execution

Fuuse has expanded to more than 750 clients and 100,000 active users.



Market innovation

The company is flexing its strength with V2G projects, inductive charging and grid optimisation tools.



Technology capability

Fuuse has a strong core platform and continues to develop its integration scope.



Technology impact

Fuuse processes enough electricity annually to power the UK for one hour.

Fuuse

The firm is also exploring inductive charging for buses, HGVs and boats, aiming to support transport electrification across heavier – and more demanding – categories. Fuuse's [energy management suite](#) lets operators monitor entire sites, shifting loads to reduce strain and unlock flexibility revenues. The tech stack is modular, enabling it to serve SMEs, councils and large corporate fleets. With grid pressures intensifying and local authorities requiring EV-ready infrastructure, Fuuse has positioned itself to meet a range of market requirements.

Cumbria to Europe and beyond

Based in Lancaster, [Fuuse](#) has grown from a regional software provider into a national B2B charging platform. [Its focus on interoperability – working with dozens of hardware brands](#) – has opened markets from NHS trusts and universities, to logistics providers and car rental firms such as Arnold Clark.

Fuuse is now laying the groundwork for international expansion with [Italy](#), [Sweden](#) and [Ireland](#) all key targets. In May 2025, it announced a partnership with [DKV Mobility](#), one of Europe's leaders in fleet management. With a [network of nearly 1 million charge points](#), DKV provides Fuuse with a pathway into continental markets.

Meanwhile, backing from [Par Equity's Scale-Up Fund](#) reflects investor confidence. The fund targets high-potential B2B software companies in clean energy and climate tech, and Fuuse is now one of its key holdings. The company is also [expanding its operational capacity, hiring more energy analysts and customer engineers to meet rising demand](#), while improving monitoring of site performance and grid interactions.

Next steps

As the EV transition accelerates, the charging conversation is moving from hardware rollout to system management. Fuuse's strength lies in its ability to operate behind the scenes: connecting different hardware, supporting grid integration and adapting to varied customer needs. The company has shown it can scale domestically. The test ahead is whether it can extend that model internationally.

Fuuse's strength lies in its ability to operate behind the scenes: connecting different hardware, supporting grid integration and adapting to varied customer needs

A close-up, low-angle shot of a red Tesla Model S parked in front of a brick building. The car's sleek design, including the front headlight and side mirror, is clearly visible. The brick wall and a white pillar are in the background.

11

Zoa

Zoa, now part of ENSEK, is a key enabler of domestic decarbonisation. Its AI-powered platform optimises home energy use – from EV charging to battery storage – with intuitive, consumer-grade control. Following its acquisition, Zoa's capabilities are now embedded within ENSEK's broader offering.

Founded
2022

Specialism
AI-powered home energy management

Headquarters
UK

Website
ensek.com

Zoa

Building on Bulb's legacy

Zoa's rise emerged from the turbulence of the UK energy sector. When Bulb collapsed into administration in 2021, a group of its former product, engineering and operations leaders – [John Marshall, Sara Brooks and Tom Fraine](#) – founded Zoa. The company developed a software-as-a-service platform enabling energy suppliers to provide customers with lower-carbon, data-driven services, including managing EV charging, monitoring solar generation and integrating battery storage.

In September 2024, Zoa was [acquired by ENSEK](#), a Centrica subsidiary, in a move that added Zoa's electrification capabilities to ENSEK's retail energy operating platform. The transaction integrated Zoa's team of more than 45 people into ENSEK's wider operations, taking its total headcount past 550 and strengthening its digital capabilities at the edge of the grid.

A platform for intelligent homes

At its core, Zoa's platform enables [energy suppliers to connect with the new electric home](#). From EV charging to smart thermostats and battery storage systems, the technology [coordinates devices to help users reduce bills, emissions and complexity](#). The system is designed for seamless integration with back-end systems and prioritises user experience, helping utilities compete with tech-first challengers. Zoa's platform has been adopted by a range of regional suppliers. It has been recognised in the [SET100 list](#) of global climate startups and shortlisted in the [Irish Electric Vehicle Awards](#).

Strategic growth with ENSEK

The ENSEK acquisition marked a turning point in Zoa's development. With ENSEK's backing, the technology now benefits from the scale and stability of a major energy incumbent. [ENSEK is integrating Zoa's technology into its wider software portfolio](#), helping European energy retailers move beyond legacy IT systems and develop new digital energy services. This includes capabilities that support managed EV charging and smarter household energy programmes.



Market execution

Following its integration with ENSEK, Zoa's capabilities are being deployed at scale across energy suppliers.



Market innovation

The platform enables smarter tariffs and connected device orchestration for energy suppliers.



Technology capability

The technology is built on robust platform architecture with broader international roll-out progressing through ENSEK.



Technology impact

Zoa's technology is contributing to ENSEK's strategy for smarter, greener homes.

Zoa

Electric homes for all

Zoa's technology forms part of [ENSEK's decarbonisation strategy](#). As households adopt smart devices, electrified transport and new tariff models, the need for orchestration software is increasing. The platform provides suppliers with tools to connect these services, while aiming to maintain usability and customer confidence.

With ENSEK's European footprint, these capabilities have scope to expand into markets where EV adoption and home solar are accelerating. The ambition remains to make the transition to electric homes [straightforward for mainstream consumers](#).

Designing for scale

The [engineering approach](#) developed by the Zoa team reflects its origins at Bulb, with a focus on modern, cloud-native architecture and rapid deployment. Its product team emphasises iterative development and faster time to market, with a platform designed to scale and help suppliers add new digital tools without major system overhauls.

As electrification progresses, these capabilities are [positioned as an interface between utilities and households](#). Under Ensek, the roadmap could include support for heat pump integration, dynamic pricing and increased automation, enabling suppliers to improve efficiency and reduce manual processes.

With the backing
of ENSEK, Zoa's tech
benefits from the scale
and stability of a major
energy incumbent



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Elysia

Elysia joins the Electric 40 with a landmark JLR deal and growing momentum as a battery software supplier. Spun out of WAE Technologies, its algorithms and cloud analytics improve EV battery life, performance and safety. Meanwhile, its digital twin technology helps detect battery issues earlier in the life cycle.

Founded

2023

Specialism

Battery intelligence and analytics software

Headquarters

UK

Website

elysia.co

Elysia

Powertrain and a power play

From motorsport to mainstream mobility, Elysia is positioning itself in the battery value chain as a software-led intelligence layer. The spinoff from WAE Technologies, now part of [Fortescue Zero](#), combines experience in automotive engineering with cloud-based tools to provide a [battery intelligence platform](#) designed to monitor performance, improve safety and extend battery life.

In 2024, it announced a multi-year deal with [JLR](#) to embed its battery management technology into next-gen EVs, starting with the Range Rover Electric. The move marks a key step in the digitalisation of EV battery systems – and a vote of confidence in UK-grown technology.

[Elysia claims its system can boost battery range by up to 10%](#) and extend life by as much as 30%. These performance gains are critical as carmakers seek to decarbonise while protecting margins. [By combining embedded algorithms that run on a car's battery control unit with a cloud analytics platform](#), Elysia offers visibility across the battery lifecycle, helping OEMs, fleet operators and financiers make smarter decisions.

The company has announced interest from [global manufacturers](#) and is designing its software deployment to serve applications ranging from passenger cars to industrial battery systems, including mining trucks. It also partners with academic researchers, for example at [The Faraday Institution](#), to help refine products including Elysia Battery Intelligence and the physics-informed digital twins that differentiate its technical stack. This work has recently been recognised for its ability to advance the algorithms behind [next-generation battery management](#).

Science-led software

[Elysia takes a hybrid approach, combining live data, electrochemical models and AI](#) to improve battery performance, safety and cost-efficiency. Its algorithms adapt to environmental, mechanical and usage conditions in real time, moving beyond fixed thresholds to provide more accurate predictions of degradation and support operational planning.



Market execution

Elysia is building traction and boasts a strong parent company.



Market innovation

Elysia is a pioneer in combining embedded controls and cloud analytics with physics-based digital twins.



Technology capability

Elysia's software combines live battery data with electrochemical models and AI to predict performance, safety and lifetime.



Technology impact

Elysia's proposition has potential in second-life and fleet use cases, and its real-world deployment is still growing.

Elysia

Elysia's digital twin technology supports early fault detection, diagnostics and more accurate state-of-health estimates. Meanwhile, its cloud platform enables predictive maintenance and benchmarking across fleets, with relevance for automotive OEMs, leasing companies, insurers and energy storage providers. By offering an OEM-agnostic approach to battery analysis, Elysia aims to become the trusted layer between manufacturers and secondary markets.

The company's embedded software can be integrated into existing control units or designed into new platforms. This flexibility positions Elysia for growth in a fragmented market. Its analytics platform provides detailed insights into battery condition and performance, validated with extensive real-world mileage data.

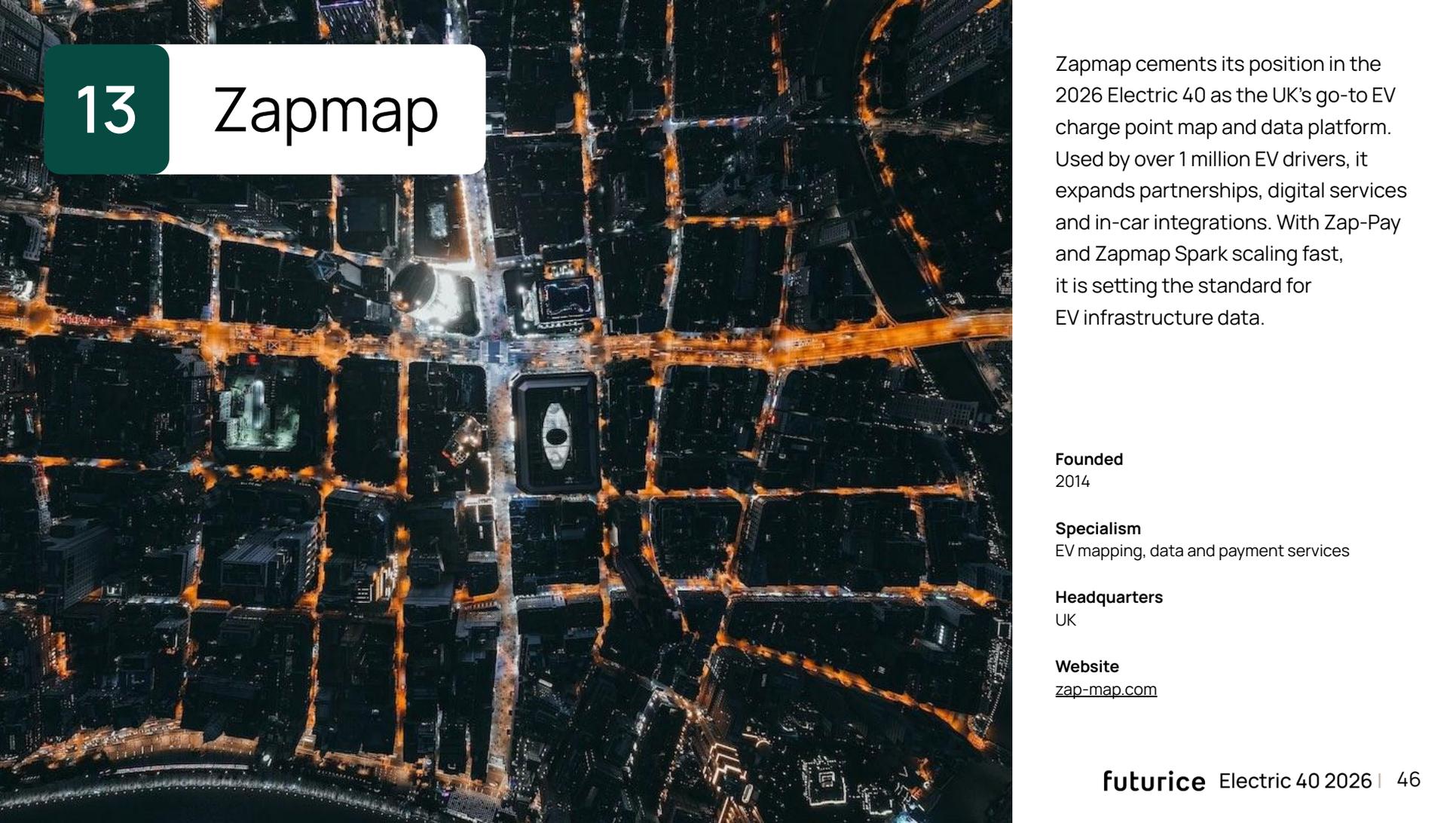
Heavyweight in the making

Although Elysia is in its infancy, its backers have pedigree. Parent company WAE Technologies was acquired by Australian green energy and metals giant Fortescue in 2022, giving Elysia access to heavy industry scale and resources. The relationship connects Elysia to both motorsport innovation cycles and large-scale industrial deployment.

As EV adoption increases, so does scrutiny of battery performance and second-life potential. Elysia's software sits at the intersection, offering carmakers a way to extend battery value and navigate upcoming sustainability regulations. It will need to keep proving its algorithms in diverse operational conditions.

With the JLR deal in motion and an evolving international pipeline, Elysia is poised to move from pilot to platform. As regulatory and commercial pressure grows for deeper battery transparency, its position as a data-rich, science-led supplier could prove pivotal.

As regulatory and commercial pressure grows for deeper battery transparency, Elysia's position as a data-rich, science-led supplier could prove pivotal



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Zapmap

Zapmap cements its position in the 2026 Electric 40 as the UK's go-to EV charge point map and data platform. Used by over 1 million EV drivers, it expands partnerships, digital services and in-car integrations. With Zap-Pay and Zapmap Spark scaling fast, it is setting the standard for EV infrastructure data.

Founded
2014

Specialism
EV mapping, data and payment services

Headquarters
UK

Website
zap-map.com

Zapmap

Mapping with magnitude

Zapmap is the UK's leading EV charge-point mapping platform, serving more than 1 million registered users who use its service to locate, plan and pay for charging. With more than 87,000 devices mapped across 44,000 locations, including over 17,000 rapid and ultra-rapid chargers, it offers real-time status updates, user reviews, route planning and payment tools – all through a user-friendly app interface. The service supports both individual EV drivers and an increasingly large pool of commercial fleet users, with Zapmap integrations now central to many B2B services.

In 2024 and 2025, Zapmap made significant commercial headway. It expanded access to charge point payments, forged data partnerships with other industry heavyweights such as the AA and unveiled a new EV charging card. These deals are giving Zapmap new channels through which to monetise its user base, while addressing long-standing hurdles in the UK's charging experience.

A trusted source

Zapmap's authority extends far beyond its consumer app. The company has become a vital data partner for government, network providers and the wider EV ecosystem. It provides market intelligence and location analytics to local authorities, helping them to identify priority areas for charge point deployment as well as plan low-carbon transport networks.

In September 2025, the Department for Transport appointed Zapmap as its EV Chargepoint Open Data provider and the company works closely with DfT and its Office for Zero Emission Vehicles on deployment progress. The platform also powers integrations with fleet tools, third-party navigation systems and in-car dashboards, making it a key connective layer across EV services.

Removing EV pain points

Zap-Pay, Zapmap's integrated payment platform, works across multiple major charge point networks, allowing drivers to pay for charging without switching apps or registering for multiple accounts.



Market execution

Zapmap has a strong user base and growing commercial traction, particularly with fleets.



Market innovation

The company continues to innovate in EV payments and B2B tools.



Technology capability

Zapmap's platform is robust and widely used, though deeper integration and AI capabilities could further enhance its value.



Technology impact

Real-time mapping and payments from Zapmap simplify charging for UK EV users.

Zapmap

Partners include Osprey, Fastned, IONITY, ubitricity, MFG EV Power and Pod, one of [the latest networks](#) to integrate into Zapmap's comprehensive payment system. [With over 40 networks and 50,000 charge points](#), Zap-Pay is making measurable progress toward solving one of the EV sector's most persistent pain points: a lack of streamlined payment options. Its [new Zapmap EV charging card](#), introduced in July 2025, is designed to make the process easier than ever.

The company's "freemium" model – a free app, with paid subscriptions for features like charger availability forecasting and enhanced route planning – gives it a sustainable commercial footing as user numbers grow. Subscription options are already being bundled into OEM and [leasing deals](#), suggesting future B2B growth.

From map to mission

As the UK moves towards its [2030 phase-out](#) of new petrol and diesel cars, Zapmap is increasingly used by drivers, industry and analysts to understand charger rollout and usage. Its data tracks charger locations and how they are used, including live availability and charger types, which help to bring transparency to deployment and performance.

This makes Zapmap a vital feedback loop in a sector often criticised for inconsistency and underperformance. With a trusted brand, and an expanding role as an infrastructure "sense-maker", the company is well placed to support the UK's shift to mainstream EV usage.

Zapmap's ongoing quest is to maintain its edge as larger navigation platforms – from Apple Maps to automakers' in-car software – increase their focus on EV architecture. But its data depth, user engagement and hyper-local accuracy still give it a competitive advantage.

Continued expansion of [Zapmap Spark](#) (the firm's API suite) and Zap-Pay, particularly in enterprise and fleet markets, will be key to the company's next phase. With infrastructure investment accelerating and user needs growing more complex, Zapmap's role as a dependable interface and data partner looks secure.

With a trusted brand and an expanding role as an infrastructure 'sense-maker', Zapmap is well placed to support the UK's shift to mainstream EV usage



**Melanie
Shufflebotham**

Co-founder and COO,
Zapmap

zap-map.com

[LinkedIn](#)

How has the UK policy landscape evolved over the past year?

We've seen a genuine step forward. After a period of uncertainty, the government's recommitment to the Zero Emission Vehicle Mandate and the 2030 phase-out of petrol and diesel cars has brought much-needed clarity. That certainty is vital for both industry and consumers. By 2030, 80% of all cars sold by each manufacturer must be fully electric. There's some flexibility, but it's a clear signal that the UK is serious about its targets. The recently announced policy to introduce the 3p/mile eVED in 2028 is a bit of a curve ball in terms of timing and messaging; this needs to be accompanied by other measures to ensure that overall public charging costs are reduced.

What are you seeing in terms of consumer demand for EVs?

Demand is growing steadily. More than one in five new cars registered last year was fully electric and, in some months, it's risen to over 30%. It's no longer a niche market. Drivers are gaining confidence in the technology and becoming more aware of the cost and environmental benefits. That said, confidence depends heavily on the public charging experience which is where the next big gains need to happen.

How would you describe Zapmap's role in that ecosystem?

We focus on giving drivers the best charging experience: helping them find a charger, check availability and pay through one platform. That simplicity builds trust. We also collect and share detailed data on network usage, pricing and reliability with businesses and government, enabling better infrastructure planning and informed policy decisions.

High-powered hubs will become standard, with six to 10 chargers per site and seamless payment

We're both a consumer service and a driver of smarter decisions across the EV landscape.

The charging rollout has accelerated recently. How ready is the infrastructure overall?

Growth has been impressive. Since the end of 2022, the overall number of chargers – which covers en-route, destination and on-street charging use cases – has more than doubled, with installations increasing by around 25% year on year. The biggest change is the rise of high-powered charging units of 150 kW or more – that can add substantial range in minutes – and are, typically, used for en-route charging. They're about three times faster than older rapid chargers. Coverage is now strong in much of the country, though deployment is still slower in Northern Ireland, Wales and the North East.

Where do you see the biggest gaps or challenges?

Local, near-home charging is still uneven. London – with a relative affluent population, high proportion of no driveway households and progressive policies – leads the way, with a high uptake of electric cars and provision of on-street charging. As a result, 75% of the UK's on-street chargers are in London and, notwithstanding a few pockets of great provision, other areas are lagging behind. For people without off-street parking, convenient local options are essential. The £430m Local Electric Vehicle Infrastructure (LEVI) fund is helping councils address this, and the first LEVI-funded site is already live in Brighton. With continued momentum, we should see better local provision across the UK over the next few years.

What innovations are improving the charging experience today?

Usability is improving rapidly. Roaming – the ability to pay across different networks using one app or card – now covers over 65% of UK charge points. We're also seeing early trials of plug-and-charge, where the vehicle automatically authenticates the session, as well as booking systems for fleets and high-demand hubs. For heavier transport, megawatt-scale charging and shared depot models are emerging, which could transform logistics.

What regulatory changes would have the greatest impact now?

The main issue is the cost of public charging. Prices have risen about 38% since 2021, driven by wholesale energy costs and how standing charges are structured. Operators pay based on capacity, not usage, which increases costs.

On top of that, UK wholesale electricity is about 30% higher than the European average. Reforming standing charges and reviewing VAT on public charging, alongside broader electricity market reform, could make public charging more affordable and fairer.

How do you expect the market to evolve over the next few years?

High-powered hubs will become standard, with six to 10 chargers per site and seamless payment via aggregator apps and, potentially, plug-and-charge. We'll see more consolidation, with operators specialising in either rapid en-route charging or local residential networks. There will be more choice for those without driveways with much more availability of on-street charging as the LEVI funding rolls out. Through-pavement charging will become a viable option for many and there will be more local charging hubs at destinations such as your local supermarket. The arrival of lower-cost electric models, particularly from China, will speed up adoption and expand the secondhand EV market, bringing more drivers into the ecosystem.

Finally, what are your hopes and your worries for the years ahead?

I hope we reach a tipping point in public perception. The tech is there, infrastructure is improving and the experience is getting better all the time. If the overall cost equation works for people and their first few charging experiences are positive, adoption will accelerate naturally.

What worries me most is cost: those relying on public networks shouldn't be paying much more than those charging at home. We need a fair, accessible system. The good news is collaboration across the industry – between operators, government and advocacy groups – is stronger than ever. That shared commitment gives me confidence in the UK's EV transition.



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Gridicity

EV charging startup Gridicity is tackling UK grid congestion with intelligent optimisation tools. With support from Innovate UK and through its TechnoQuest partnership, it is trialling smart charging agents that promise to cut customer bills and reduce reliance on new infrastructure.

Founded

2022

Specialism

Smart charging optimisation and energy management

Headquarters

UK

Website

gridicity.co.uk

Gridicity

Dynamic scheduling

Gridicity's core proposition is simple: make EV charging significantly more efficient at both the site and grid interface level. Its software platform leverages real-time data and predictive modelling to help charge point operators, fleets and consumers cut costs and smooth demand. As EV adoption accelerates and local grid constraints become more prominent, Gridicity is positioning itself to tackle a key bottleneck: the mismatch between charging demand peaks and grid capacity.

The company's partnership with TechnoQuest on the Smart Agent for Efficient Charging (SAFEC) project marks a significant step forward. Funded through Innovate UK's BridgeAI programme, the collaboration focused on using artificial intelligence to dynamically schedule and maximise EV charging, aiming to cut electricity bills by over 40% for customers.

Flexible and hardware agnostic

Gridicity's platform is designed to be integrated with existing EV chargers and energy systems via API, helping operators optimise without major hardware replacement. This approach aligns with current UK priorities to accelerate EV infrastructure rollout, while managing financial and policy constraints.

Gridicity's model serves multiple stakeholder groups. For fleets, the platform schedules charging around real-world constraints, including tariffs, power availability and required departure times. For charge point operators, it provides analytics and optimisation tools to improve site utilisation and avoid local overloads.

Grid-ready charging

Gridicity is developing V2X capabilities through an Innovate UK-funded consortium exploring how EVs could provide grid services – and, in some settings, return energy when needed. Rather than operate in isolation, it focuses on coordination across multiple vehicles and sites, helping shift EV demand away from peaks and towards more efficient system operation.



Market execution

Gridicity's delivery is in its early stages, with strategic partnerships and pilots Under way.



Market innovation

Gridicity's smart, real-time optimisation platform has mass-market applicability.



Technology capability

The company's AI-driven algorithms have been designed for scale and flexibility.



Technology impact

Gridicity could help manage rising demand by optimising EV charging loads and supporting smarter grid operation.

Gridicity

Power in simplicity

Gridicity has received development support from [Innovate UK Business Connect](#). This public funding has helped the company to scale without diluting its focus, and enabled it to invest in IP such as real-time optimisation engines and forecast-enhanced decision logic.

Despite a lean team, [Gridicity is already running pilots with fleet providers, public sector bodies and charge point manufacturers](#). Its roadmap includes additional AI functionality, closer integration with energy networks and [support for renewable-aligned charging schedules](#).

The company's focus is on measurable outcomes, including cost-savings, demand-smoothing and supporting faster EV rollout. [Rather than pursuing speculative approaches, it seeks to integrate intelligence into existing systems](#). In a competitive market for smart charging, this positioning highlights its role as an enabler within the UK's wider decarbonisation strategy.

From pilots to scale

The challenge now is converting pilots into repeatable deployments and proving that performance holds across different fleets, sites and tariff regimes. As smart charging evolves quickly, Gridicity will need to stand out through demonstrable ROI, reliable integrations and consistent results at scale.

Gridicity's partnership with TechnoQuest on the Smart Agent for Efficient Charging project marks a significant step forward

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Uber (Europe)



Uber's electric and autonomous endeavours are gathering pace. With partnerships spanning Waymo, Baidu and Lucid, Uber is becoming a key platform for the EV future. In the UK, its Clean Air Plan expansion, driver EV incentives and work with Wayve make it a key player in the transport transition.

Founded
2009

Specialism
Ride-hailing and mobility platform

Headquarters
US

Website
[uber.com](https://www.uber.com)

Uber (Europe)

Zero-emissions ride-hailing

Uber continues to push forward its transition to electric vehicles in the UK, where it remains one of the largest ride-hailing services. As part of its [Clean Air Plan](#), the company committed to becoming fully electric in London, a goal supported by its [PowerUp package](#), which helps fund drivers to switch to EVs.

As of July 2025, there are estimated to be [20,000 Uber drivers in London using EVs](#), backed by discounted rentals and dedicated EV support hubs. Other EV-support initiatives in the capital include EV assistance for drivers and broader [charging-access partnerships](#).

In addition, Uber Eats has teamed up with eMobility provider Vmoto to offer financial incentives for [couriers adopting electric vehicles](#) in a number of European cities, including London. It also recently launched a [robot-powered takeaway scheme](#) in Leeds and Sheffield, as part of a global partnership between Uber Eats and the startup Starship Technologies.

These initiatives reinforce Uber's role in evolving today's urban mobility systems in London and beyond. It has also lobbied the EU to [ban combustion engines on ridesharing cars](#) by 2030.

Expanding autonomy

Globally, Uber is focusing on deploying autonomous mobility through partnerships and platform orchestration rather than developing AV hardware in-house. In 2025, the company announced a major partnership with Chinese tech giant Baidu to roll out [the Apollo Go robotaxi fleet](#) across markets, including Europe and London. The move signals the arrival of self-driving taxis in the UK capital in a pilot later this year (2026), pending regulatory approval. This follows Uber's [growing alliance with Waymo](#). Alphabet's autonomous driving unit, which has seen the companies launch commercial robotaxi services in US cities including Phoenix, Austin and Atlanta. While these deployments are US focused, they lay the groundwork for Uber's longer-term rollout plans in dense, regulated markets such as the UK.



Market execution

Uber has achieved significant UK EV fleet penetration and is on course to become fully electric in London.



Market innovation

Uber's platform model makes it easier to integrate new fleet partners and charging innovations as they emerge.



Technology capability

Uber leverages strong partnerships with AV and EV pioneers, rather than building in-house hardware.



Technology impact

The firm's UK impact is increasing, thanks to Uber's EV incentives and work with Wayve.

Uber (Europe)

Closer to home, Uber's early-stage work with London-based [AV startup Wayve](#) signals plans to trial self-driving cars on UK roads. The collaboration involves pilot deployments and data sharing to train AI-based driving models tailored to complex urban environments, with [public-road trials planned for London](#) in spring 2026.

New fleet models

Uber also announced a plan to deploy [more than 20,000 Lucid vehicles](#) equipped with Nuro's autonomous driver tech, a move that signals the company's evolving role as a platform for premium EV fleets. While initially focused on North America, the Lucid-Nuro-Uber configuration could offer a blueprint for future electric services in the UK. In July 2024, the company also made a deal with BYD for 100,000 EVs, intended to give Uber drivers in Europe and beyond access to "best-in-class" [pricing and financing](#).

Question of charging

In the UK, Uber's electrification strategy depends increasingly on access to robust charging infrastructure. To ease pressure on drivers, Uber has [partnered with bp pulse](#) to offer discounted charging at key locations and is working to integrate route-based charging suggestions into its app.

In November 2024, Uber collaborated with [Octopus Energy and BYD](#) to create what has been touted as the UK's cheapest EV charging bundle specifically for Uber drivers. With thousands of EVs operating daily in London alone, Uber is also well placed to serve as a real-time source of data on public charging demand. This would help infrastructure planners identify peak times, underserved zones and congestion patterns.

Uber ranks in the upper tier of this year's Electric 40, reflecting its shift from ride-hailing app to EV ecosystem coordinator. Partnerships with bp pulse and Wayve show an approach built on collaboration rather than hardware ownership, positioning Uber to plug into the UK's electrification push and upcoming self-driving trials. Its next challenge is to double down on infrastructure, regulation and driver incentives.

With thousands of EVs operating daily in London alone, Uber is well placed to serve as a real-time source of data on public charging demand

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Zest



Zest has carved out a niche in the UK's EV rollout by linking ultra-rapid charging with urban regeneration. Backed by £105m from the Charging Infrastructure Investment Fund, it works in partnership with the public sector, deploying infrastructure for NHS trusts, local authorities and universities.

Founded

2021

Specialism

Ultra-rapid charging combined with urban regeneration

Headquarters

UK

Website

zest.uk.com

Zest

Charging up the campus

Zest's approach to charging infrastructure is rooted in public-private partnership. Rather than chasing driver demand, it focuses on building infrastructure where people live, work and park, anticipating future growth and unlocking everyday access. The model appears to be gaining traction. In the past 12 months, Zest has opened new facilities in university campuses, regenerated council-owned car parks and expanded kerbside charging across city streets.

A high-profile milestone came in November 2025 with Zest's completion of 142 charging spaces across 14 locations at the University of Warwick. Billed as one of the largest university charging hubs in the UK, the site combines long-stay and rapid chargers to support students, staff and the wider community. The project came amid various other major council-led initiatives, including the March 2025 launch of an ultra-rapid charging site in Bolton, rapid EV charging expansion in Hounslow and on-street charge points in Portsmouth. These moves reflect Zest's wider emphasis on regenerative infrastructure and are mirrored in further installations across the country.

Growth with government support

B Corp Zest is one of the few operators backed by the UK's Charging Infrastructure Investment Fund (CIIF), a government-supported scheme designed to boost public EV charging. The fund's involvement has helped Zest secure long-term contracts with local authorities, including Newport City Council and the North East Combined Authority, and has helped build rapid charging stations at 75 sites under the Mayor of London's Electric Vehicle Infrastructure Delivery (EVID) framework.

These wins position Zest to support councils navigating complex procurement, planning and power constraints by offering a full-service package, from site analysis to operations and maintenance. The model aligns with public sector aims to accelerate EV adoption without shouldering capital costs.



Market execution

Zest is building strong traction with councils and public sector frameworks, and a growing deployment footprint.



Market innovation

Although Zest's regenerative infrastructure model stands out, its product innovation is modest.



Technology capability

The company focuses on reliability and speed over proprietary technology.



Technology impact

Zest is making an important contribution to regional accessibility but its national scale is still growing.

Zest

Health, data and demand

Zest is also making inroads into the healthcare sector. In January 2024, it signed [an EV charging framework agreement with the NHS](#) that enables trusts to procure and deploy charging infrastructure across their estates. The deal complements Zest's wider work with [local authorities](#) and public bodies, in which it aims to provide scalable solutions for high-demand, high-throughput environments, such as hospitals, city centres and transit hubs. As demand rises for accessible, reliable charging in essential services, Zest's role as a neutral, infrastructure-first partner is becoming increasingly valuable.

Meanwhile, [a partnership with Zapmap](#) ensures Zest's locations are visible to UK EV drivers on one of the most-used mapping platforms in the country, bolstered by the recent inclusion of its charge points [in the Octopus Electroverse app](#).

Everyday EV usage

Zest's primary focus on ultra-rapid chargers (150 kW+) leads to short dwell times and meets the needs of drivers using vehicles with faster charging curves, particularly newer models. But, unlike other rapid networks, its locations often sit in mixed-use sites, including commuter hubs, council car parks, supermarkets and leisure centres, where installation has lagged behind demand. These sites are critical to supporting EV usage.

The company has publicly committed to "[abundant, convenient and reliable charging facilities](#) [...] synchronised with people's lives", positioning itself as an infrastructure enabler, rather than a consumer-facing brand. This may limit its profile, but enhances its appeal to councils and property owners seeking a silent partner in the EV transition, especially those aiming to meet sustainability targets or deliver equitable access to clean transport.

[With expansion underway across the North East, the Midlands and West Belfast](#), Zest is becoming an important player in delivering charging infrastructure to the places that risk being left behind in the EV rollout. The company's success will depend on maintaining pace and performance across a diverse asset base, balancing rural, urban and suburban demand, site by site. But its strategy gives Zest a credible, long-term role in the UK's [charging ecosystem](#).

Zest is becoming an important player in delivering charging infrastructure to the places that risk being left behind in the EV rollout

A nighttime photograph of a cityscape with numerous lights from buildings and houses. In the foreground, a road curves through a dark field, with long, bright light trails from vehicles, primarily in shades of cyan and white, creating a sense of motion and energy.

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Brill Power

Brill Power is scaling with its BMaaS (battery management as a service) model, combining hardware, software and analytics in a subscription package. It delivers live insights, remote optimisation and longer system life. Brill is targeting the UK's storage market with a scalable full-stack model.

Founded
2016

Specialism
Battery management

Headquarters
UK

Website
brillpower.com

Brill Power

Better battery diagnostics

Brill Power's new BaaS model combines its full suite of technologies – the BrillCore hardware, BrillOS firmware and BrillAnalytics cloud platform – into a single monthly subscription offer. It enables battery owners and operators to monitor system health in actual time, improve performance remotely and extend system life without needing to install or replace physical components.

BaaS is positioned to scale across the UK's growing commercial storage market. It is already live with customers – including now-parent company Palmer Energy Technology Limited (PETL) (which plans to embed Brill Power technologies within all PETL systems imminently) – and received funding from Advanced Propulsion Centre UK. Brill's model provides diagnostics including degradation-rate insights and remaining useful life forecasts, supported by over-the-air and continuous firmware updates that keep embedded algorithms current.

New commercial model

The company's shift to a subscription-based approach marks a commercial milestone. Rather than selling hardware or software in one-off deals, Brill Power now generates recurring revenue by embedding itself in the ongoing operation of battery systems. Its hardware-agnostic software is compatible with new and second-life batteries alike, creating a flexible route to market adoption.

At the core is Brill's proprietary Active Loading technology, which intelligently distributes current across cells to maximise performance and minimise stress. By improving utilisation of ageing cells, the system can unlock up to 46% more energy and extend battery lifetime by up to 60%. This can reduce augmentation or oversizing needs and lower lifetime costs and emissions.



Market execution

Brill's commercial model is in its early stages, with real deployments and recurring revenue in place.



Market innovation

The company's first-of-its-kind BaaS proposition integrates analytics, firmware and hardware.



Technology capability

The firm's physics-based modelling and BrillOS platform underpin a strong technical proposition for battery systems.



Technology impact

Brill's offering has high potential for asset optimisation, but publicly available, field-scale performance data is limited.

Brill Power

The technology is well suited to battery energy storage systems (BESS) in commercial and grid-scale contexts, where cost and performance pressures are high and underperformance can erode investment returns. Brill's ability to integrate analytics, control firmware and physical interfaces gives it a full-stack position, highly unusual for a company of its size.

Real-world traction

Brill's commercial traction is at an early stage but showing promise. It raised \$10.5m in Series A funding in 2022, backed by Legal & General Capital and Barclays Sustainable Impact Capital, and it has since boosted its proposition to target fleet owners, battery developers and storage asset managers. PETL's acquisition of Brill in August 2025 was accompanied by a £5m investment from FirstGroup plc, Barclays Climate Ventures and Oxford University, with plans to supercharge the UK's significance in battery energy storage development.

Brill's technology, originally developed at Oxford University, is now being explored for use in long-duration storage, V2G systems, and circular applications using second-life EV batteries. The BaaS platform is also being pitched as a flexible way for customers to test optimisation features before committing to full platform rollouts. This provides an entry point for asset owners at different stages of their battery life cycle.

As interest in second-life batteries grows, Brill's active loading and modular analytics could help unlock latent value in systems previously considered end of life. It's also aligned with the emerging need for continuous, remotely updated infrastructure across distributed energy networks.

An integrated mindset

Brill's near-term challenge is scaling from early adopters to the wider market. It is betting on an integrated hardware–firmware–analytics approach, delivered through longer-term service models such as BaaS. Success will hinge on demonstrating cost savings and reliability at larger scale, but growing industry interest in smart battery optimisation plays to Brill's strengths.

As interest in second-life batteries grows, Brill's active loading and modular analytics could help unlock latent value in systems previously considered end of life



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Dynamon

Dynamon is helping some of the UK's largest logistics operators and energy providers transition to electric fleets through data. Backed by bp Ventures and the government's eFREIGHT 2030 trial, the Southampton-based startup is preparing to scale into Europe and North America.

Founded
2015

Specialism
Fleet electrification analytics

Headquarters
UK

Website
dynamon.co.uk

Dynamon

From pilot to platform

As the transport sector races to decarbonise, fleet operators face mounting pressure to go electric – without undermining performance, profitability or uptime. Southampton-based [Dynamon](#) is offering them a way forward. Its flagship platform, ZERO, uses [advanced predictive analytics](#) to identify the most cost-effective EVs, charging infrastructure and operating strategies for large fleets.

This is no academic exercise. In a recent [4,000-vehicle trial](#), the software flagged a potential £22m in annual energy savings and an 8,700-tonne CO₂ reduction. That performance – and rising demand for trusted transition tools – helped Dynamon [secure a £4m Series A investment](#) from bp Ventures in August 2023.

Trusted by government and industry

Dynamon's credibility received a major boost in 2024, when it joined the UK government's flagship [eFREIGHT 2030](#) programme – a £63m, nationwide trial of electric HGVs coordinated by the [Department for Transport](#) and delivered through [Innovate UK](#). The trial brings together a logistics consortium that includes Kuehne+Nagel, Menzies Distribution, Wincanton, Maritime Transport, Expect Distribution and Welch's Transport. Dynamon's role is to provide optimisation software that helps these fleets simulate vehicle–infrastructure–energy combinations under different route, load and charging scenarios. The wider project also features DAF, Renault Trucks and Scania Trucks, as well as infrastructure partners like [Voltempo](#) and [Fleete](#), positioning Dynamon at the heart of the UK's commercial fleet electrification agenda.

Product, partners, and proof

Dynamon's [ZERO](#) platform is designed to bridge the gap between high-quality data and real-world logistics. It models key fleet variables – route profiles, charging strategies, infrastructure upgrades, energy pricing and depot constraints – to help managers design credible, costed transition plans, before making capital commitments.



Market execution

Dynamon supports fleet operators with real-world electrification planning.



Market innovation

The company models fleet usage patterns to forecast EV suitability and cost savings.



Technology capability

Dynamon integrates energy tariffs and vehicle data into one tool.



Technology impact

Dynamon is helping to accelerate low-emission fleet transitions across freight and logistics.

Dynamon

In parallel with the bp Ventures investment, Dynamon also signed a commercial agreement with bp pulse, bringing its decision-support tools to a wider base of enterprise fleet customers. And in November 2025, the company boosted its scaleup plans via a partnership with logistics consultancy AllChiefs to help "bridge the gap" between its powerful data analytics and real-world implementation.

The company is now turning its attention to international growth. With operations planned in Europe and North America, Dynamon is adapting the platform for markets with different fleet ownership models, grid structures and decarbonisation mandates. The US, in particular, presents a complex challenge, with its fragmented energy markets and state-by-state regulatory variance.

Decarbonisation by design

What sets Dynamon apart is its whole-system view. Rather than focusing on standalone cost or emissions estimates, Dynamon delivers dynamic, scenario-based modelling that factors in operational constraints, energy tariffs, driver patterns and vehicle availability.

As the eFREIGHT 2030 trial moves into full rollout by 2026, Dynamon's software will be applied across thousands of vehicles in some of the UK's most complex logistics environments. These trials are expected to generate rich, field-tested data, reinforcing ZERO's credibility and sharpening its predictive accuracy for future fleet deployments.

The real opportunity lies in embedding Dynamon into the fabric of fleet operations as a transition engine used not just at the start of electrification journeys but continuously, as vehicles, fuel prices and regulations evolve. With strong UK traction, regulatory alignment and growing global ambition, Dynamon is positioning itself as a key building block of the commercial EV stack.

With strong UK traction, regulatory alignment and growing global ambition, Dynamon is positioning itself as a key building block of the commercial EV stack



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Eatron Technologies

Eatron is powering the shift to smarter, safer and more durable EVs through AI-driven battery management software. Backed by LG Technology Ventures and Oshkosh Corporation, and working with WMG and the Faraday Institution, the UK-Türkiye startup is scaling rapidly.

Founded
2018

Specialism
AI battery management software

Headquarters
UK/Türkiye

Website
eatron.com

Eatron Technologies

Smarter batteries

Eatron's core technology adds an intelligent software layer to traditional battery systems – predicting faults before they happen, optimising charge cycle and extending life. Unlike conventional battery management systems (BMS), which operate using static rules, Eatron's platform adapts in real time using advanced diagnostics.

The result is a more dynamic and resilient battery: one that lasts longer, performs more consistently, and delivers deeper operational insight. Projects like VIPER, delivered with WGM and the Faraday Institution, combine cloud analytics with electrochemical modelling to improve remaining useful life (RUL) predictions, reporting over 90% accuracy in tests, a capability that could help OEMs manage warranties and customer expectations.

Strategic backing

Eatron's software-first approach is attracting serious investment. In 2024, it closed a double-digit, million-dollar Series A2 round led by LG Technology Ventures and supported by MMC Ventures, Türkiye Development Fund and 100th Year Venture Capital. Soon afterwards, Oshkosh Corporation took a strategic stake, bringing industrial validation beyond the EV market. Eatron deepened its collaboration with Infinion Technologies, extending compatibility with its PSOC microcontrollers and scaling beyond automotive to industrial- and consumer-grade battery systems.

Cross-sector traction

The company's software can be layered on top of existing battery architectures, offering manufacturers a cost-effective route to next-generation intelligence without redesigning hardware. That makes it highly attractive to OEMs seeking cost-efficient upgrades and scalable performance enhancements.

The platform is already in use across a variety of battery-powered systems, from electric vehicles and e-scooters to stationary energy storage, smart appliances and industrial equipment.



Market execution

Eatron is scaling rapidly with backing from LG Technology Ventures, MMC Ventures and strategic partners Oshkosh and Infineon.



Market innovation

The company applies advanced diagnostics and adaptive algorithms to optimise real-time battery performance and lifespan.



Technology capability

Eatron's modular AI architecture is designed to integrate across automotive and industrial battery systems.



Technology impact

Eatron's software strengthens the resilience and sustainability of global battery supply chains.

Eatron Technologies

In each case, it provides real-time visibility into battery status to improve safety, enable predictive diagnostics and lower lifetime costs. For fleet operators and grid service providers, this level of precision helps align battery deployment with operational demand and regulatory requirements.

Eatron's collaboration with Infineon highlights that flexibility as its software has already been pre-validated and deployed on Infineon's PSOC microcontrollers, enabling rapid integration into automotive, industrial and consumer applications. By aligning software intelligence with widely adopted controller platforms, Eatron is opening doors to adjacent sectors, from robotics and light industrial vehicles to consumer power tools.

Looking ahead

Eatron is now preparing for global scale. Its short-term roadmap includes deeper integrations with EV and storage OEMs, broader support for cloud-edge architectures and new features such as over-the-air upgrades, automated performance alerts and smart warranty tracking.

But the longer-term ambition runs deeper. Eatron is positioning itself as a key enabler of battery lifecycle transparency – critical as regulators push for greater traceability and circularity. Its technology can underpin EU Battery Regulation Compliance by delivering granular, real-time data on usage history, degradation and safety, boosting both second-life resale value and environmental credentials.

The energy transition demands smarter grid integration. Eatron's analytics platform is designed to enable advanced battery functionality, such as demand-response and V2G, giving fleet operators new tools for energy optimisation. In the near future, its software could help shape dynamic energy markets, where batteries don't just store energy but flex in response to pricing signals, emissions targets and grid-balancing needs.

Eatron is positioning itself as a key enabler of battery lifecycle transparency, critical as regulators push for greater traceability and circularity



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GRIDSERVE

In 2025, GRIDSERVE combined fresh investor backing with continued UK network expansion, growing its footprint to nearly 1,500 charging bays. It also began translating the GIGATONS launch into international activity, starting with plans for Australian renewables-powered charging.

Founded

2017

Specialism

EV charging and clean energy infrastructure

Headquarters

UK

Website

gridserve.com

GRIDSERVE

A global pivot

The [launch of GIGATONS](#) in December 2024 marked a turning point for GRIDSERVE. Described by its founders as a \$100bn global climate tech platform, the initiative aims to accelerate the transition to net zero by integrating solar generation, EV charging, AI and blockchain. GIGATONS is headquartered in Abu Dhabi, with GRIDSERVE's founding team now focused on international growth, while UK operations continue under CEO Daniel Kunkel.

A dedicated entity, GRIDSERVE Global, was formed to support this transition. The first international market is Australia, where [GRIDSERVE has partnered Flow Power](#) to roll out the country's first renewables-powered EV charging network. Announced in 2025, the project received support from the [Australian Renewable Energy Agency \(ARENA\)](#) as part of its funding for EV charging infrastructure, backing a multi-site east-coast rollout.

Growing through pain

At home, GRIDSERVE has undergone significant change. A restructure in 2024 reduced headcount from 320 to 239 employees, while the company [posted a pre-tax loss of £82.7m](#), a 51% increase on the previous year. Despite these challenges, revenue climbed from [£29.1m to £46.2m](#), reflecting positive underlying demand for public and commercial charging. In July 2025, the company announced [£100m in fresh equity](#) from long-standing investors including TPG Rise and Mitsubishi HC Capital UK Plc, which enabled the continued UK network expansion of [GRIDSERVE's Sun-to-Wheel ecosystem](#). October 2025 saw deployment of the [ABB E-mobility A400](#): one of the UK's most powerful public chargers, which can add over 100 miles of range in less than 10 minutes.

Network scale and reach

GRIDSERVE's UK footprint [now includes nearly 1,500 charging bays across over 190 locations](#) from motorway service hubs to leisure parks and dedicated [Electric Forecourts®](#). It's also pushing ahead on work for the first of seven new [electric truck charging hubs](#) as part of the government-backed Electric Freightway programme.



Market execution

GRIDSERVE achieved UK network and revenue growth, despite significant losses and cuts.



Market innovation

The firm launched GIGATONS and its new, 400kW-capable charger is one of the most powerful on the market.



Technology capability

The company delivers integrated solar, storage and EV charging through its Sun-to-Wheel model.



Technology impact

GRIDSERVE is one of the UK's largest charging networks and is beginning to expand its ambitions internationally.

GRIDSERVE

The company's Sun-to-Wheel model integrates solar energy, battery storage and EV charging infrastructure, offering a clean, high-availability solution for both individual drivers and fleets.

Strategic partnerships remain vital. In July 2025, the company partnered taxi firm Addison Lee to increase sustainable transport options at London Gatwick, and delivered a £1.4m electric HGV charging station at the Nissan Sunderland Plant (as part of the Innovate UK Electric Freightway project).

GRIDSERVE also continues to collaborate with brands such as Resolve Esports to engage new audiences, and with corporate landlords to unlock high-traffic, long-dwell sites. And it has also maintained its alliance with Moto motorway services, helping increase the availability of rapid charging along UK highways. With new equity secured, the UK business remains a vital testbed for GRIDSERVE's broader aims.

Climate tech vision

GIGATONS marks a strategic shift, positioning GRIDSERVE to evolve into a vertically integrated climate-tech company with a global remit. While technical specifics remain limited, the platform aims to enable zero-carbon AI and blockchain infrastructure, addressing the environmental cost of energy-intensive computing through end-to-end decarbonisation.

The concept could open new business models, linking clean energy and EV infrastructure, load balancing, data centres, and carbon offset tools into a unified platform. It also aligns with rising demand for sustainable AI infrastructure and green digital services, where energy use and carbon intensity are increasingly scrutinised.

The challenge will be maintaining UK operations while expanding internationally; execution and investor confidence will depend on balancing growth with operational resilience. With GIGATONS and renewed investor backing, GRIDSERVE is aiming to evolve into a global climate-tech infrastructure player. The coming years will test its ability to scale across hardware, systems integration, clean energy orchestration and digital services – and whether it can become a credible model for convergence between energy, mobility and computing.

GIGATONS marks a strategic shift, positioning GRIDSERVE to evolve into a vertically integrated climate-tech company with a global remit



21

Laka

Laka's distinctive take on micromobility insurance stood out in a year of expansion. It raised Series B funding, entered nine European markets and acquired portfolios from Allianz Direct and CoverCloud. That growth backs its goal to embed insurance as a seamless part of the eMobility experience.

Founded
2017

Specialism
Insurance for green mobility

Headquarters
UK

Website
laka.co

Laka

Insurance with a twist

Laka is no longer just a bike insurer. In the past year, the London-based startup has stepped up as one of Europe's fastest-growing micromobility platforms. Its [\\$10.4m Series B round](#) in July 2025 – co-led by Shift4Good and MS&AD Ventures – added to earlier investment from Achmea Innovation Fund aimed at fuelling continental expansion. It was followed by a [£6.5m Venture Debt Facility](#) from HSBC Innovation Banking in November 2025, bringing total Series B funding to £14.1m. Today, [Laka operates in the UK and nine EU countries](#), and [covers more than €200m in insured value](#).

The company's growth is being driven by a string of strategic acquisitions. In March 2025, Laka acquired Allianz Direct's 20,000-strong [e-scooter insurance portfolio](#) via a deal with French insurtech Luko. In 2024, it also [took on renewal rights to CoverCloud's UK bike policies](#), consolidating its domestic base while expanding overseas.

Embedded by design

Laka's model has always leaned on deep integration with cycling brands and retailers, and the past year has seen that approach intensify. The company has built a network of [embedded insurance](#) partnerships with manufacturers such as Decathlon (in the Netherlands and Germany), Urban Arrow, Tenways, Gazelle and Riese & Müller. In most cases, policies are bundled with purchases or offered at point of sale, an approach that brings insurance closer to the riding experience.

It also became the [official insurance partner](#) of the Royal Dutch Cycling Federation (KNWU), integrating accident and race cover directly into cycling licences. These moves allow Laka to serve professional and casual riders, as well as position insurance as a value-added feature.



Market execution

Laka sustained solid growth across the UK and Europe with strong retail traction and acquisitions.



Market innovation

The firm's distinctive pricing and embedded insurance model have been built for the micromobility age.



Technology capability

Laka prioritises simplicity and brand-first design over deep technical differentiation.



Technology impact

The company has secured over €200m in insured value and a rapidly increasing multimarket footprint.

Laka

Community values

Unlike traditional insurers, Laka uses a collective pricing model where monthly claims are shared across the customer base, up to a guaranteed cap. There's no excess on bike claims and unused contributions are returned. The model has built community loyalty and aligns with riders' preference for transparency and flexibility and the approach has earned Laka consistent recognition. It was Best Cycle Insurance Provider in the Insurance Choice Awards for eight years in a row, and is regularly among top-rated providers on Trustpilot.

Building the brand

Laka's growth is driven by product and platform scale, with brand positioning also playing a role. Its emphasis on design and sustainability messaging differentiates it from traditional insurers, and has helped Laka gain traction with younger consumers, urban riders and companies looking for green-aligned partners.

The company's further expansion into micromobility, with products for e-scooters and e-cargo bikes, opens new channels. However, this diversification beyond its cycle roots will require careful brand management.

Laka's next hurdle is execution. Integrating acquisitions, streamlining operations across 10 markets and maintaining partner relationships at scale will be critical to its long-term sustainability. The company also faces increasing competition from integrated insurance players and OEM-led solutions.

Still, with solid investor backing (including Porsche Ventures, Autotech Ventures and 1818 Ventures), a differentiated model and a fast-growing customer base, Laka looks well placed to shape how Europe's green mobility ecosystem is insured.

Laka's model has always leaned on deep integration with cycling brands and retailers, and the past year has seen that approach intensify

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Energy Park



Energy Park is targeting one of the EV market's most underserved segments: apartment buildings. Backed by £35m from Zouk Capital, the company is scaling its end-to-end charging solution for multi-dwelling units, using cloud-based management tools with a property-developer-first approach.

Founded

2021

Specialism

EV charging for apartment buildings and multi-tenant housing

Headquarters

Harpenden, UK

Website

energy-park.co.uk

Energy Park

Residential focus

Energy Park is scaling fast into a critical EV infrastructure gap: multi-tenant residential properties. In June 2024, it secured a £35m investment from Zouk Capital, the firm behind the UK Government's Charging Infrastructure Investment Fund (CIIF). The investment will be used to expand Energy Park's charging footprint across apartment buildings, private rental blocks and residential developments.

The company offers a full-stack service, from initial site consultation to ongoing maintenance, positioning itself as a strategic partner to property developers and facilities managers. It designs charging infrastructure around site-specific constraints, and manages long-term support via a cloud-based software platform.

In a market often focused on roadside and destination charging, Energy Park's residential model helps address one of the biggest blockers to EV uptake in cities: lack of accessible charging. With over 40% of UK households lacking a driveway or garage, the company's success will depend on how well it can scale reliable, building-integrated infrastructure.

Smart integration

Energy Park's tech platform allows remote monitoring, diagnostics and usage reporting – giving property managers and building operators real-time visibility into charge-point availability, billing and energy use. This cloud-based model reduces site visits and supports proactive maintenance, helping build trust with both landlords and tenants.

The solution is also designed for future flexibility. Energy Park's back end can accommodate load-balancing, shared metering and user-level billing across multiple residents. While its current deployments are focused on Level 2 AC chargers, the company has left the door open to faster options where grid conditions allow.



Market execution

Energy Park secured £35m investment to help expand UK residential EV infrastructure.



Market innovation

The firm focuses on apartment blocks with a full-service charging model.



Technology capability

Energy Park is delivering cloud-based software with full lifecycle support.



Technology impact

The company enables EV adoption in underserved multi-tenant housing environments.

Energy Park

Though not yet a household name, Energy Park is quietly becoming the partner of choice for property developers navigating building regulations and [grant access](#) for EV infrastructure. It also positions itself as a facilitator of the UK's [Local Electric Vehicle Infrastructure \(LEVI\)](#) agenda, connecting public funding with long-term, site-specific execution.

Forward planning

Energy Park's strength lies in sector focus and timing. As planning frameworks increasingly require EV infrastructure in [new-build residential projects](#) and leaseholders seek visible climate credentials, the company is poised to capitalise on a shift in landlord expectations.

Its operational model – combining physical installation with software-led service – is well aligned with property industry needs. But it will face pressure from larger networks and facilities service providers if residential charging becomes a more competitive vertical.

In May 2025, [Energy Park was certified by B Lab](#), the not-for-profit behind the B Corp movement, as having met rigorous standards of social and environmental performance, accountability and transparency. The B Impact Assessment evaluated Energy Park's practices and outputs across governance, workers, community, environment and customers. The company's [Impact Score exceeded B Corp's 80-point threshold](#) for certification, performing particularly well in the areas of environmental footprint and employee wellbeing.

With funding in place and an execution strategy already proven across early sites, Energy Park's challenge now is scale. If it can maintain service quality while rapidly growing its footprint, it could become a leading name in residential EV enablement, helping to bring the energy transition closer to home.

Energy Park's operational model – combining physical installation with software-led service – is well aligned with property industry needs



**Gavin
Malone**

Founder and
Chief Operating Officer,
Energy Park

energy-park.co.uk

[LinkedIn](#)

How would you describe the current state of the UK's eMobility ecosystem?

The UK has made strong progress in some areas, particularly the rollout of DC public charging hubs and the growth of on-street charging supported by LEVI funding. But there is a major gap being missed, and it is increasingly urgent. Apartment blocks and other multi-dwelling units are lagging badly in EV adoption because residents do not have access to reliable, affordable home charging. In big cities, where the rollout can look advanced on paper, a large cohort of people still live in multi-dwelling units with no practical way to charge at home. In places like London, with low emission zones and high urban density, that makes the problem acute.

What does your company focus on, and why apartment buildings?

We focus on creating a true home charging experience for people who live in apartment buildings or multi-dwelling units. It is a massive, underserved market in the UK of about 4.3 million households. Typical solutions, like putting a single charger in one person's parking space, do not translate well to communal car parks. Power supplies are often shared across a building, which makes allocating costs difficult. Deployment can also be unfair or unaffordable because the cost of connecting a bay can vary depending on distance from the power source. Our aim is to deliver affordable, scalable charging infrastructure that addresses those challenges properly.

Longer term, communal EV charging car parks could function like mini power plants

What is broken in the way landlords approach EV charging today?

From a landlord's point of view, the options are not great. Doing nothing is common, but it leaves residents stuck. The alternative is trying to implement a solution themselves, which is often expensive, not turnkey, and not designed with future needs in mind. We are trying to give landlords and resident communities a viable third option that works across an entire site, not just a handful of bays.

How does your model work in practice?

We fully fund, manage and maintain the infrastructure for landlords. Repayment comes through a B2C subscription model, which limits exposure to usage and treats access more like a utility. The goal is to make this workable for landlords without requiring large upfront capital outlay, and workable for residents by keeping access affordable and predictable. We are targeting housing associations, property management companies and resident committees, and we are aiming to cover around 30,000 parking bays under contract over the next five years.

How do you see apartment charging evolving longer term?

Longer term, communal EV charging car parks could become more than charging infrastructure. With connected devices, they could function like mini power plants that help stabilise the electricity grid by controlling the flow of power. There is also a customer servicing angle. Residents tend to park late and leave early, and at scale you can start to anticipate usage patterns. AI could help predict usage based on factors like local events, adoption rates and behaviour patterns. We do not have active AI use cases today, but we expect these capabilities to become more relevant as we gain scale and data.

What changes would unlock faster deployment and adoption?

Policy and regulation need to catch up, particularly around accessibility and pricing for end users in apartment buildings. EV charging in these settings is effectively unregulated, in part, because Ofgem excluded EV charging in 2014, and that has left residents exposed to pricing that can be wildly out of step with normal home charging.

We are seeing apartment residents paying seven to eight times a typical driveway rate and, in some cases, it can end up more expensive than petrol. That is a major barrier to adoption and needs urgent attention.

Alongside that, the government grant system needs refining where it is not working effectively in practice. There is also a wider confidence problem created by uncertainty, such as shifting timelines on phasing out non-EV vehicles or talk of new taxes on electric vehicles. That uncertainty slows growth and increases consumer concern at a point when the market needs clarity.

What is the role of insurers and safety standards in apartment charging?

Insurance is a significant hurdle. Insurers can be cautious about new EV charging technology in buildings, particularly where headlines focus on fire risk. That slows down deployment even when solutions are technically sound. There is a role for government in providing clarity and working with insurers to establish standards and regulations that increase confidence and make it easier for landlords to proceed.

What disruptions or shifts do you expect next in this market?

Integration will deepen. We expect more battery technology and solar to be integrated into charging solutions. Charging technology will also move forward, including the potential for inductive, wireless charging mats embedded into parking spaces, which could suit apartment buildings where space is constrained. Another shift is payment. In time, payment could be integrated directly into the vehicle, removing the need for separate apps or transactions. That could also open up new leasing models where charging is bundled into the overall cost, making the experience simpler for end users.

23

EZ-Charge



EZ-Charge is targeting underserved towns and cities with its rapid charger network. Backed by multimillion-pound funding, it is focusing on roaming, transparent pricing and local authority partnerships, with plans for up to 5,000 charge points nationwide.

Founded

2020

Specialism

Community and local authority
EV charging

Headquarters

Bicester, UK

Website

ez-charge.co.uk

EZ-Charge

Scaling from local

EZ-Charge began with a regional mission: bring public EV infrastructure to underserved communities. After completing the Park and Charge Oxfordshire project – with up to 250 22 kW chargers across 20 hubs – it became a leading public charge point operator in the county. The Oxfordshire rollout now provides a blueprint for national growth.

In 2023, the company secured a multimillion-pound investment from Green Tower, a renewable energy investment fund. That funding is now fuelling its plan to deploy up to 5,000 charge points across the UK within three to five years, with an emphasis on mid-sized towns, retail areas and municipal sites.

This local-first model is key to EZ-Charge's differentiation. Rather than compete head-on with motorway giants, it targets daily-use locations where EV adoption is growing, but infrastructure is thin. The company works closely with local authorities, councils and business parks to co-design sites that meet both operational and accessibility standards.

Practical tech

EZ-Charge's network spans AC and DC chargers, with all units offering contactless payment as standard – from 22 kW AC up to 400 kW ultra-rapid. The company provides a real-time dashboard for partners, showing usage stats, uptime and site status, and recently signed a roaming agreement with Paua to extend cross-network access for drivers.

The firm is trials EV bay management tools that help reduce behaviour such as charger-hogging. This aligns with its broader emphasis on accessibility and driver behaviour, recognising that infrastructure is only useful if it's reliably available.



Market execution

EZ-Charge is one of the largest CPOs in Oxfordshire and is planning 5,000 charge points across the UK.



Market innovation

The firm is pioneering real-time dashboards, roaming integration and charge bay management pilots.



Technology capability

EZ-Charge deploys contactless rapid chargers and live availability tracking.



Technology impact

The company is expanding regional charging access with a strong public sector footprint.

EZ-Charge

EZ-Charge is also a campaigning voice, calling for the equalisation of VAT on public charging, which currently sits at 20%, four times higher than the 5% rate applied to domestic electricity. By championing policy change, the company is positioning itself as a customer advocate in a market where price disparity remains a barrier to fair access.

Expansion opportunities

By focusing on utility over novelty, and investing in consistent charging rather than flashy branding, EZ-Charge is aiming to build infrastructure that prioritises availability and equity, with a clear role in the 'everyday' public charging layer, namely retail parks, car parks and municipal sites.

EZ-Charge's next phase will test how well a community-first model can scale. Its roots in local authority collaboration give it strong foundations, but the network will need to keep pace with driver expectations as usage rises, particularly in maintenance, pricing clarity and charger speed.

The firm's success in Oxfordshire gives it a proof point, but national expansion will bring new logistical and grid constraints. Its transparent approach – open data, roaming partnerships and real-time status-sharing – may prove an asset as the public EV landscape matures.

By championing policy change, EZ-Charge is positioning itself as a customer advocate in a market where price disparity remains a barrier to fair access



**Philip
Shadbolt OBE**

CEO,
EZ-Charge

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How would you describe the current state of the UK's eMobility ecosystem?

Overall, it's improving. Progress is being driven by better access, usability and reliability. More charge points are being deployed, and funding like LEVI should dramatically increase access in local authority car parks and spaces over the next couple of years.

Where does EZ-Charge fit into that ecosystem?

We focus heavily on the user journey and on keeping chargers operational. That means making it easy to pay in different ways, and making sure the hardware and software are doing what they should. That focus has translated into around a 10% year-on-year increase in utilisation and really positive customer feedback on ease of use.

What's still getting in the way of a consistently good charging experience?

Reliability is hard because there are so many points of failure. You're dealing with the charger hardware, modems, back office systems and the communications handshake with the car. Keeping units online 24/7 sounds simple but, in practice, it's a complex chain.

The only area where hydrogen looks meaningfully viable is commercial mobility

What specific usability change would make the biggest difference right now?

Incremental authorisation. Today, many drivers see a large holding charge up front, for example £50, which feels nothing like buying petrol and creates a poor experience. Incremental authorisation would make charging feel more like pay-as-you-go at a fuel pump. Progress has been slow because parts of the infrastructure and banking systems have lagged behind.

What are you seeing on the engineering side, and what actually improves uptime?

Hardware has improved. Temperature monitoring and management make a difference, including systems to prevent failures caused by moisture or overheating. But support also matters. A 24-hour helpline is an essential part of the experience, especially for people who are new to charging or who hit a problem.

What kinds of faults are drivers still calling about most often?

One common issue is not being able to unplug the cable at the end of a session, which can come down to software glitches or vehicle-side problems. Sometimes you need a manual, mechanical disconnect. That's exactly why support has to be treated as part of the product, not an add-on.

Where do you see the biggest opportunities for growth and innovation over the next 12 to 18 months?

Higher-power charging is a big one. There will always be a place for slower charging where cars are parked for longer, but there's growing demand for a more petrol-type experience, maximum power as quickly as possible, even if it costs more. The industry is moving towards 300 kW charging, which can charge a mid-sized family vehicle in roughly 15 to 20 minutes.

Are there infrastructure constraints that will shape what operators build next?

Yes, capacity limitations are real. One exciting direction is chargers with built-in batteries. You can store power at low-cost times, for example overnight, and deploy it when demand is higher. That helps manage site constraints and supports a better customer experience.

What software developments do you think will matter most next?

Dynamic billing. The ability to price charging differently at different times, for example cheaper off-peak, can influence behaviour and help balance grid demands.

How do you expect the charging market to evolve structurally?

I expect consolidation. There are a lot of charge point operators, and many are burning cash rather than reaching profitability. As investor patience runs out, there will be opportunities for mergers and acquisitions and a smaller number of scaled operators.

What could policy do better to support momentum?

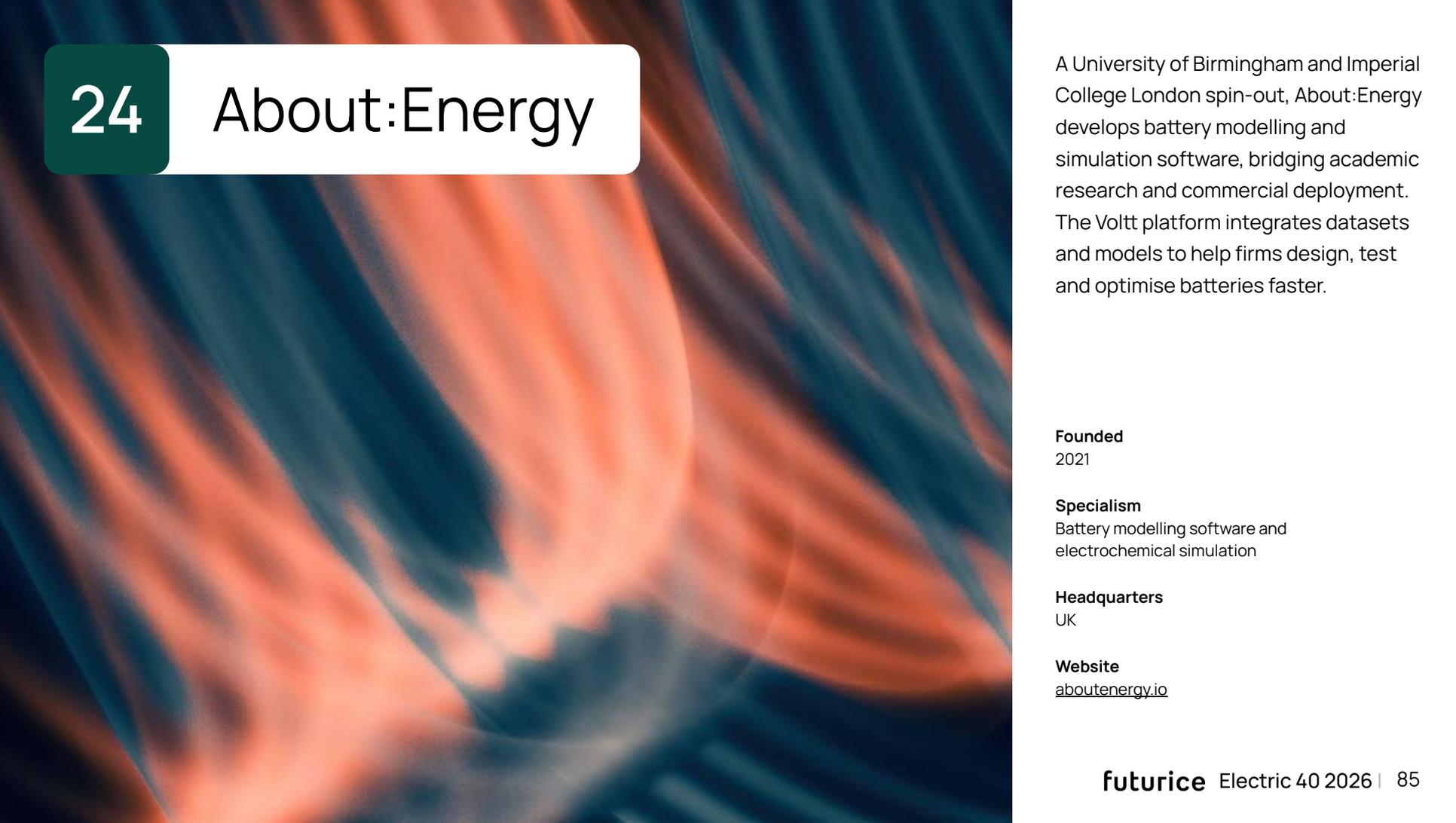
Consistency. Mixed messaging from government creates uncertainty, disrupts investment and gives the market an unhelpful impression.

And what about public perception?

There's still a lot of misinformation from EV sceptics, including claims about battery materials or vehicle weight and potholes. But over the last 12 months, as more people get real lived experience, perceptions are shifting. People try EVs and see them as better in day-to-day use.

Do you see hydrogen changing the direction of travel?

Not for mainstream passenger vehicles. Hydrogen is less efficient than battery electric and the idea that hydrogen cars will replace EVs is a myth that's been disproven. The only area where hydrogen looks meaningfully viable is commercial mobility.



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About:Energy

A University of Birmingham and Imperial College London spin-out, About:Energy develops battery modelling and simulation software, bridging academic research and commercial deployment. The Voltt platform integrates datasets and models to help firms design, test and optimise batteries faster.

Founded

2021

Specialism

Battery modelling software and electrochemical simulation

Headquarters

UK

Website

aboutenergy.io

About:Energy

From lab to application

In late 2023, About:Energy signed a technology licensing agreement with the University of Portsmouth and the University of Southampton to commercialise Dandelion, a high-speed electrochemical modelling system developed with £2m in funding over five years from The Faraday Institution. The software is now being integrated into About:Energy's core platform, the Voltt, enabling developers to simulate performance, charging behaviour and ageing effects with greater precision and speed. By streamlining the development cycle, the software reduces reliance on costly trial-and-error prototyping, helping companies cut costs and accelerate time-to-market for next-generation batteries. This capability is especially valuable given the UK's strategic ambitions to build a domestic battery supply chain, supported by government initiatives such as the Faraday Battery Challenge.

Software for the electrified era

About:Energy's emphasis on simulation reflects a wider shift in automotive and energy storage R&D. Just as aerospace companies increasingly use digital twins to test designs virtually, battery manufacturers are now turning to advanced modelling tools to reduce physical testing requirements. The Voltt allows companies to evaluate how different chemistries, form factors and charging protocols will behave under real-world conditions without waiting months for lab results.

The platform offers pre-built cell models, grounded in empirical data, that give engineers immediate insights into performance trade-offs. This data-driven approach transforms raw scientific findings into actionable business intelligence, enabling companies to design products with confidence. This enables emerging EV OEMs and early-stage battery startups to test ideas at pace, adapt to shifting supply chains and reduce the risk of costly missteps.

In 2025, About:Energy reported that the Voltt continues to gain traction with industry users. The company's database of commercial battery models now features over 30 high-performance cells from LG, Samsung and Molicel, as well as next-generation innovators such as Amprius and InoBat.



Market execution

About:Energy operates a SaaS (software as a service) platform serving a growing base of commercial and research customers.



Market innovation

About:Energy is turning academic research into real-time simulation tools and applied business intelligence.



Technology capability

The firm's advanced simulation and modelling software is grounded in real-world lab testing.



Technology impact

About:Energy supports the UK battery ecosystem by making advanced modelling accessible for faster, lower-cost innovation.

About:Energy

Bridging the research gap

A key differentiator for About:Energy is its ability to bridge the long-standing divide between university research and commercial engineering. By maintaining close collaborations with institutions such as [Southampton](#) and [Portsmouth](#) Universities, the company ensures that cutting-edge electrochemical research is rapidly translated into usable software features.

About:Energy's integration of multiple university datasets into standardised, accessible APIs gives engineers and scientists a single point of access to battery research. The result is a platform that accelerates collaboration across sectors – from automotive giants to niche aerospace suppliers – while also supporting the UK's ambition to lead globally in [battery intellectual property](#). For example, About:Energy is currently collaborating with Australian satellite innovator MP Space in a trial that showcases the link between [advanced virtual testing](#) and next-level battery design.

From SaaS to scale

About:Energy's business model is SaaS – offering flexible access to simulation features, custom modelling and data integrations – which supports predictable recurring revenue potential in clean tech.

In 2024, About:Energy won a [Global Innovation Award at the Plug and Play Expo](#) for a collaboration with STMicroelectronics. The award was for a technology demonstrator for battery management systems, signalling growing recognition of its approach. The company continues to expand its capabilities by onboarding new academic partners and extending its dataset coverage.

Future-proofing the business

The company's long-term success will hinge on its ability to continue turning academic insight into practical solutions that address manufacturers' most pressing pain points. This will be helped by recent recruitment. In 2025, the company said [its team had grown by over 50%](#), as it brought in senior talent from high-growth technology and battery companies to scale product development and customer success. About:Energy is well positioned to become a foundational layer in the software infrastructure of the electrified economy.

About:Energy's integration of multiple university datasets into standard, accessible APIs gives engineers and scientists a single point of access to battery research

A close-up photograph of a white electric car's charging port. A white charging cable with a black handle is plugged into the port. The car's body is white and glossy, and a black wheel is visible in the lower left corner. The background is a dark, textured surface, likely asphalt.

25

Electric Miles

UK-based Electric Miles has developed a charge-management SaaS platform that makes EV charging infrastructure a smarter part of the energy grid. It is building momentum through seed funding, a proof-of-concept V2G trial and a 2025 fleet partnership with Ryze Power.

Founded

2017

Specialism

EV smart charging software, charge management, V2G services

Headquarters

Hertfordshire, UK

Website

electricmiles.com

Electric Miles

From seed funding to platform scale

Electric Miles is building its growth on a series of seed funding rounds that have supported development of its intelligent charge-management platform. It completed its most recent funding round on 2 December 2024, according to market intelligence platform Tracxn. Earlier investment came from climate-focused funds such as the Low Carbon Innovation Fund and Blue Lake VC.

These rounds have enabled Electric Miles to scale its platform as a software-as-a-service (SaaS) offering. The software manages charging sessions, communicates with chargers and vehicles and provides interfaces for both drivers and operators. By focusing on software, rather than hardware, Electric Miles can scale without heavy capital expenditure.

Strategic partnerships and V2G trials

In 2023, Electric Miles announced a collaboration with Austrian utility company VERBUND, alongside automotive supplier Magna, charger manufacturer Ambibox and charging network operator SMATRICS. Its focus is proof-of-concept trials of V2G capability.

The project is designed to demonstrate how EVs can act as mobile energy assets, charging when renewable supply is high and discharging back to the grid at times of peak demand. Electric Miles' platform provides the control layer, integrating energy trading signals with charger hardware to optimise bidirectional flows. To date, the startup has successfully helped provide residential EV flexibility by coordinating thousands of chargers across networks including SPEN, UKPN, NGED and Northern Powergrid. By validating this approach with major energy and automotive partners, the company is laying the groundwork for commercial deployment of V2G services in Europe.

Fleet energy management

In December 2024, Electric Miles announced a partnership with Ryze Power to deliver fleet energy management solutions.



Market execution

Electric Miles has secured seed funding, grown partnerships and is scaling its SaaS platform in the UK and Europe.



Market innovation

Electric Miles forged strategic V2G and fleet partnerships to unlock new flexibility revenue streams.



Technology capability

Its charge-management SaaS is being validated in trials with major energy and automotive partners.



Technology impact

Electric Miles' SaaS platform combines energy signals with charger control to optimise charging, with V2G capability emerging through partner projects.

Electric Miles

The collaboration combines Electric Miles' intelligent charging software with Ryze Power's expertise in distributed energy systems, enabling fleets to cut charging costs, reduce operational emissions, and unlock new revenue streams through flexibility services.

Also in 2025, Electric Miles launched the [emPACT](#) (Electric Miles Platform for Accelerating Clean Technologies) system. Developed for customers ranging from EV fleet managers and charge point operators to hotels, local authorities and commercial landlords, emPACT enables real-time control of EV chargers, advanced diagnostics maintenance functionality and smart energy management.

EVs as grid assets

Electric Miles operates at the convergence of two major trends: the rapid expansion of electric vehicle uptake and the increasing importance of flexibility in the power system. By 2030, millions of EVs are likely to be connected to the UK grid, creating both a challenge for network operators and an opportunity for software companies that can intelligently orchestrate charging.

With its SaaS platform, Electric Miles is part of a new generation of companies providing the digital infrastructure for the electrified economy. Its model offers predictable recurring revenues and scalability without the costs of manufacturing. While competition is growing, Electric Miles' ability to forge partnerships with utilities, automotive suppliers and fleet operators helps strengthen its market position.

Speed to market

Looking ahead, Electric Miles' trajectory will depend on how quickly it can turn trials into commercial services. The [V2G proof of concept with VERBUND, Magna and partners](#) positions the company for entry into flexibility markets, but scaling from pilots to reliable revenue streams remains a challenge. Its [collaboration with Ryze Power](#) shows promise in the fleet sector, where operators are under pressure to cut costs and carbon. Success will also hinge on regulatory frameworks: UK and EU policy on grid flexibility, tariffs and V2G incentives will heavily influence adoption rates.

Electric Miles' ability to forge partnerships with utilities, automotive suppliers and fleet operators strengthens its market position



**Arun
Anand**

Founder and CEO,
Electric Miles

electricmiles.com

[LinkedIn](#)

How would you describe the current state of the UK and European eMobility ecosystem?

The UK and wider European electric mobility ecosystem is in what I'd describe as a 'messy middle' phase. EV adoption is accelerating, but the supporting infrastructure, energy systems and digital layer are still catching up. We're seeing a transition away from a hardware-first mindset towards software and data-led approaches.

Chargers are becoming commoditised and the real value is moving into orchestration: smart charging, load management, user access, billing and data-driven optimisation.

At the same time, there's a shift away from an almost exclusive focus on public rapid charging. While public infrastructure is essential, a large proportion of charging happens in private and semi-private environments, such as workplaces, depots, residential buildings, hotels and campuses. These locations have very different operational needs and business models. Chargers are no longer just sockets on a wall. They are flexible loads that need to be integrated with building capacity, energy tariffs, on-site generation and, increasingly, wider grid services.

Where does Electric Miles sit within that landscape?

Electric Miles focuses on private and semi-private charging environments, where users are known and authorised, such as employees, residents, fleet drivers or guests. In these contexts, organisations care about energy optimisation, access control, operational simplicity and visibility over costs and performance.

Chargers are becoming commoditised and the real value is moving into orchestration

By orchestrating charging through software, chargers can become flexible energy assets rather than unmanaged cost centres. That means staying within existing building capacity, optimising against tariffs, and providing reliable charging for users.

How ready is the UK's charging infrastructure and where are the biggest gaps?

On headline metrics like charger numbers, the UK has made good progress. But one of the biggest gaps is in private and semi-private infrastructure.

Many workplaces, depots and residential developments have installed chargers with little consideration for energy management, access control or data. The urgent need is to move from simply installing hardware to operating smart, managed infrastructure.

Capacity management is another challenge. At both building and distribution level, constraints are common, yet many sites still size infrastructure for worst-case peak demand. Using smart charging to stay within existing capacity is often cheaper and more scalable. Finally, user experience and reliability still lag. For most drivers, confidence comes from day-to-day charging at home or work, not national coverage maps.

What opportunities do you see for growth and innovation in the next 12 to 18 months?

One major opportunity is scaling smart private charging across workplaces, fleets and properties. Large numbers of chargers are being deployed, and the opportunity is to upgrade those installations into orchestrated networks with dynamic scheduling, load management and analytics.

Energy cost optimisation is another area of rapid growth. With volatile energy markets, organisations are increasingly focused on shaping demand through time-of-use tariffs and on-site generation. Smart charging that aligns charging with the cheapest or lowest-carbon energy can deliver immediate returns.

There's also an opportunity around smaller fleets. Much of the industry focus has been on large, complex operators, but there's an underserved segment of SMEs with 10 to 50 vehicles that need pragmatic tools, rather than enterprise-scale telematics projects.

Which emerging technologies could reshape the sector?

AI-driven charging orchestration is one area with real potential, particularly for private networks.

By learning site-level patterns such as vehicle arrival times, dwell duration, energy needs, tariffs and capacity constraints, software can automatically schedule charging to keep vehicles ready while minimising cost or emissions.

We're also seeing growing interest in simulation and digital twins for depots and campuses, allowing operators to model scenarios before investing in hardware or grid upgrades. More broadly, EV charging is becoming part of a wider flexible asset stack alongside batteries, solar and building energy systems.

How do you expect the mobility ecosystem to evolve over the next five years?

Charging will become largely invisible to end users. As vehicle range improves and private charging becomes more widespread, software will handle scheduling and optimisation in the background. Drivers will simply plug in, while systems ensure vehicles are ready at the lowest cost and within capacity limits.

Private infrastructure will also become a major pillar of the overall system. Workplaces, depots and residential sites will behave more like mini virtual power plants, actively managed for capacity, tariffs and, in some cases, grid services.

Finally, we'll see continued consolidation in hardware and public networks, alongside increasing specialisation in software, with platforms tailored to the operational realities of different segments rather than one-size-fits-all solutions.



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Wevo Energy

Wevo Energy was founded in 2021 to bring cost-effective EV charging to energy-constrained environments. Acquired by SolarEdge Technologies in April 2024, its AI-driven software is at more than 900 sites, powering 60,000 parking spaces to enable smarter EV charging without costly grid upgrades.

Founded
2021

Specialism
EV charging optimisation and management software

Headquarters
UK/Israel (subsidiary of SolarEdge)

Website
wevo.energy

Wevo Energy

From startup to strategic acquisition

Wevo builds software that optimises EV charging for commercial sites. SolarEdge, a global leader in smart energy, acquired the company in 2024 to add that capability to SolarEdge ONE, extending its optimisation stack beyond solar and storage. For SolarEdge, the deal was about more than expanding into EV charging. By embedding Wevo's platform into its SolarEdge ONE energy optimisation suite, the company can offer commercial and industrial customers a unified system that manages solar generation, battery storage and EV infrastructure in real time.

Scaling through SolarEdge

By joining forces with SolarEdge, Wevo gained access to a global distribution network and integration with a widely adopted smart energy platform. This significantly enhances its market credibility and ability to scale. Unlike many proprietary charging solutions, Wevo's system is vendor-agnostic and built on open standards, supporting interoperability across different charger models and energy systems. This openness can help accelerate adoption, and also positions Wevo as a flexible solution at a time when the industry is moving away from closed ecosystems.

The acquisition also reflects a growing consolidation trend in the energy software market. As EV adoption accelerates and grid pressures increase, hardware giants are acquiring software innovators to create end-to-end solutions. Wevo's integration into SolarEdge ONE could signal how smart charging, renewables and storage converge in the commercial sector.

AI-driven optimisation at scale

Wevo's appeal lies in its ability to turn limited electrical capacity into an opportunity. Its AI-powered load management technology dynamically allocates available power across multiple chargers, allowing car parks, office blocks and apartment complexes to electrify at scale without expensive grid upgrades. This approach is already being deployed at more than 900 sites, managing over 60,000 parking spaces, globally.



Market execution

Wevo is able to scale rapidly through SolarEdge's global network and is deployed at 900 sites worldwide.



Market innovation

Wevo delivers open, vendor-agnostic smart charging that unifies solar, storage and EVs.



Technology capability

The platform dynamically balances power across chargers to maximise available capacity.



Technology impact

Wevo enables large sites to electrify cost-effectively, cutting infrastructure upgrades and emissions.

Wevo Energy

Partnerships in action

Wevo's technology has been tested in real-world collaborations. UK dealership group [Dick Lovett Porsche](#) streamlined its EV charging operations using Wevo's software, delivered in partnership with hardware provider Simpson & Partners. In Australia, charging network operator [EVAYA](#) expanded its footprint by 60% without upgrading grid connections by relying on Wevo's intelligent load balancing. And in the commercial sector, [HB Commercial](#) integrated solar power and smart charging to reduce energy costs and optimise operations. Each case highlights how the platform delivers measurable cost, scalability and sustainability benefits.

Data platform integration

In August 2024, Wevo announced [a new integration with Eco-Movement](#), a global data platform for EV charging stations. Designed to enhance the visibility and accessibility of EV charging stations, it provides charge point operators and EV charging solution providers with a tool to drive more traffic to their charging points.

Sector leadership

With the [shutdown of the Shell Sky](#) chargepoint management system in North America in April 2025, [Wevo stepped in](#), successfully migrating hundreds of EV chargers to its system and exemplifying adaptability in the face of change. Wevo is also embracing AI. In March 2025, [it launched Olivia](#), which it claims is the first AI phone support agent purpose-built for the EV charging sector. Available to Wevo-operated EV charging fleets, Olivia offers immediate, 24/7, human-like assistance for EV drivers experiencing charging issues.

Scaling the platform

The big question for Wevo is how quickly it can move from niche deployments to widespread adoption as part of SolarEdge ONE. Integrating solar, storage and EV charging into a single control layer is technically demanding, but also potentially transformative for commercial and residential sites under pressure to decarbonise. Success will depend on real-world performance: can Wevo consistently deliver cost-savings, reliable scalability and grid-friendly charging without compromising user experience?

With SolarEdge's backing, it has the resources to push for global scale, but its challenge will be maintaining the agility and innovation that made it attractive in the first place.

The big question for Wevo is how quickly it can move from niche deployments to widespread adoption as part of SolarEdge ONE

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British Gas



British Gas is becoming a key player in the UK's EV transition, through smart tariffs, customer-first tech and strategic partnerships. With consecutive Uswitch Energy Awards wins and deals with Zapmap and Zaptec, its Hive-powered charging ecosystem offers cheaper and greener charging models to EV drivers.

Founded

1812

Specialism

Integrated EV tariffs and services

Headquarters

UK

Website

[britishgas.co.uk](https://www.britishgas.co.uk)

British Gas

Customer impact

British Gas has undergone a customer satisfaction turnaround, winning the 2024 and 2025 [Uswitch Energy Awards for Best Overall Improvement](#) based on verified customer reviews. [Trustpilot](#) ratings have risen to 4.4 stars – out of a current total of 336,500 reviews, approximately 203,000 are five-star – an upward trend partly linked to the company's enhanced EV offerings and digital service improvements.

EV drivers benefit from several incentives, including [a dedicated electric vehicle tariff](#) with low rates of 7.9p/kWh for off-peak home charging. The 2024 launch of an EV tariff calculator brought greater transparency, helping drivers estimate their annual savings – [typically £332 compared with standard tariffs](#), and up to £961 cheaper than public charging. For new EV drivers, British Gas also offers a 12-month [FreeCharge programme](#) covering up to 8,000 miles of free home charging.

In November 2025, the company partnered Zaptec to unveil [the UK's first communal EV tariff](#), which could see a 50% drop in charging costs for residents in shared living spaces (along with significant infrastructure savings for landlords). These schemes aim to make EV ownership more accessible, particularly for first-time drivers navigating the cost and complexity of electrification.

Partnership boost

In October 2024, British Gas entered a [strategic partnership with Zapmap](#) to integrate home and public charging into a single, unified experience via the [Hive app](#). Customers installing a Hive EV charger can now claim a £20 public charging credit – roughly 100 free miles – usable across thousands of charge points in Zapmap's network.



Market execution

British Gas has improved customer satisfaction and is expanding its EV charging ecosystem.



Market innovation

It has launched FreeCharge, SmartCharge and Hive-linked tools with home-public integration. It has also partnered Zaptec on the UK's first communal EV tariff.



Technology capability

British Gas is enabling solar compatibility, app control and off-peak savings.



Technology impact

The company is helping to lower charging costs for drivers and is contributing to wider EV adoption.

British Gas

The partnership aims to support more than 1 million customers in making the switch to EVs, with full Zapmap integration enabling route planning, usage tracking and payment through a single app. Lillian Greenwood MP, then-Minister for the Future of Roads, [said](#): “Fantastic to see this partnership between Hive and Zapmap to make at-home and public charging even more accessible for drivers.”

As part of their strategic relationship, British Gas and Zapmap offer a [Hive Charging Card](#), which offers tap-to-pay functionality at compatible public charge points. Meanwhile, its platform continues to support solar integration via the [EO Mini Pro 3](#) charger, enabling drivers to charge using excess rooftop generation.

Smart savings

British Gas's [SmartCharge](#) feature provides a 4p/kWh rebate when customers leave vehicles plugged in during the overnight window (12am to 5am), reducing the effective charging rate to just 3.9p/kWh.

By funnelling charging demand into off-peak hours, the programme supports [grid load balancing](#) while unlocking deeper cost-savings for users. Such programmes highlight how major suppliers can use data and pricing signals to influence charging behaviour and manage network stress.

What's next

British Gas's opportunity extends beyond EV charging. The Hive platform, already supporting heating, lighting and home energy management, is evolving into a broader hub for household electrification. By linking EV charging with other smart-home services, British Gas can help customers optimise their energy use and reduce costs across the home.

However, there are challenges. Delivering seamless integration across EVs, solar and home energy systems will require continued digital investment and data security. Competition from agile energy-tech entrants will test whether British Gas can innovate at speed while preserving customer trust. Balancing consumer incentives with grid constraints and volatile energy pricing will also shape how effectively it sustains its momentum.

By linking EV charging with other smart-home services, British Gas can help customers optimise energy use and reduce costs across the home



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Connected Kerb

Connected Kerb aims to become the UK's largest public EV charging network after securing £65m in government-backed funding. Its goal is to tackle infrastructure inequality head on, bringing smart, street-level charging to underserved communities and local authorities.

Founded
2017

Specialism
On-street EV charging infrastructure

Headquarters
UK

Website
connectedkerb.com

Connected Kerb

Expansion capital

In January 2025, [Connected Kerb](#) secured a major public-private funding boost – [£55m from the UK government's National Wealth Fund](#) alongside [£10m from Aviva Investors](#). Announced by Chancellor Rachel Reeves as the first major National Wealth Fund deployment, the investment will accelerate the company's expansion from 9,000 to 40,000 public charging sockets.

The company is targeting residential streets, social housing zones and long-dwell locations, sites traditionally underserved by commercial operators. With an [estimated 33% of UK homes lacking off-street parking](#) (more in urban areas), Connected Kerb's mission is as much social as technological: to remove charging as a barrier to EV adoption for the millions of households who park on the street. In many areas, drivers face limited access not only to chargers but also to EV-ready vehicles and supporting infrastructure.

By concentrating efforts where they're most needed, Connected Kerb aims to reduce the risk of low-income and urban communities being left behind in the transition and has advocated for more joined-up planning between central government, local authorities and charge point operators.

Public-first partnerships

Connected Kerb continues to partner [numerous local authorities](#), helping them access and deliver infrastructure via the [LEVI fund](#). From Greater Manchester to Kent, its deployments factor in local EV uptake rates, energy constraints and equity goals. Recent plans include more than 600 EV charge points for [West Berkshire Council](#), as well as over 800 chargers in [a £1.6m project](#) for Blackburn with Darwen.

Connected Kerb's model is structured for long-term partnerships. Local authorities, typically, retain ownership of the assets while Connected Kerb manages installation, operations and ongoing maintenance. This enables councils to generate local revenue, secure matched funding and keep infrastructure embedded in the community.



Market execution

Connected Kerb is increasing its sockets from 9,000 to 40,000 through public-first deals.



Market innovation

The firm is focused on residential, social housing and equity-led charging solutions.



Technology capability

Connected Kerb offers modular chargers with remote diagnostics and a long lifespan.



Technology impact

The firm has widened access to EV charging in residential areas previously underserved by rapid chargers.

Connected Kerb

A [Zapmap dynamic data partner](#), the network now delivers live availability data. It also integrates with [Zap-Pay](#) for app-based transactions across multiple networks, offering EV drivers a consistent user experience.

Built to last

At the heart of Connected Kerb's approach is its durable, street-integrated hardware. Designed for a [20-year lifespan](#), its chargers feature underground electronics, swappable heads and no bulky cabinets, minimising street clutter and enabling easier deployment in heritage sites or conservation areas.

[Connected Kerb also aims to ensure that one in five bays is wheelchair accessible](#) and has begun trialling tactile surfaces, improved lighting and height-adjusted interfaces across sites. The goal is to make EV infrastructure as intuitive and inclusive as possible.

[The firm reports a 99% operability rate](#), backed by remote diagnostics and automated maintenance alerts. [Chargers are UK-manufactured, future-proofed for load balancing and wireless upgrades](#), and support both AC and hybrid residential-rapid charging models.

What's next

Connected Kerb seeks to position itself as a national enabler of equitable infrastructure and is investing in new use cases: integrating kerbside [charging with intelligent, data-driven load management \(laying the groundwork for grid balancing\)](#); supporting council and business fleets across on-street, workplace and public-estate sites; and enabling cross-border interoperability [via European roaming partnerships](#).

Connected Kerb's ambition is to demonstrate that public charging doesn't need to be a patchwork of pilots. By blending private capital, local authority engagement and resilient technology, it is attempting to deliver a connected system, achieving decarbonisation, social value and future flexibility all at once. However, scaling this vision will depend on sustained council partnerships, consistent regulatory support and the company's ability to maintain reliability and cost efficiency as it expands nationwide.

Connected Kerb reports a 99% operability rate, backed by remote diagnostics and automated maintenance alerts

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Diode



Diode is helping UK businesses decarbonise, one decision at a time. Its award-winning digital platform combines EV suitability tools, solar feasibility analysis and employee engagement insights in a single interface, now used across SMEs via a partnership with NatWest.

Founded
2019

Specialism
EV and energy transition planning for SMEs

Headquarters
UK

Website
diode.energy

Diode

Platform-first strategy

In 2025, Diode was announced as a key technology partner to build NatWest Group's Sustainability Solutions platform, a digital toolkit designed to help UK SMEs plan their journey to net zero. The platform, available free to all businesses, integrates EV readiness assessments, solar feasibility checks and employee engagement tools into one streamlined interface.

Sustainability Solutions is designed for agility and accessibility. SMEs can access personalised fleet electrification insights, including when to replace petrol or diesel vehicles, how to engage staff in EV switchovers, and whether to install solar panels – complete with payback period calculators. Diode's software also enables businesses to model scenarios across entire fleets, supporting board-level decision-making with robust, real-world data.

The Diode platform is focused on implementation. It guides users through actionable steps, selecting the right vehicles, understanding grid constraints, evaluating on-site generation and communicating benefits to staff. With over 95% of UK businesses classed as SMEs, this focus on simplicity and relevance is crucial for scale.

According to Diode, the firm has positioned itself as a bridge between environmental ambition and practical delivery, helping organisations make confident, costed decisions that reduce emissions without disrupting operations. And because the platform is public facing, its impact reaches beyond NatWest's customer base to the broader SME community.

Award-winning innovation

Diode's technology has been recognised by Fleet World, which has handed it the Innovation in Digital award for two consecutive years, reflecting Diode's standout contribution to digital fleet management and carbon reduction. Diode's ability to combine fleet telematics with employee-level insights creates a richer picture of where, and how, businesses can decarbonise without requiring specialist support.



Market execution

Diode launched an SME-focused platform with NatWest and has won the Innovation in Digital prize at the Great British Fleet Awards for two years running.



Market innovation

The firm is developing tools for solar feasibility, EV education and fleet decarbonisation engagement.



Technology capability

Diode's platform combines telematics insights with EV cost-modelling, including salary-sacrifice scenarios.



Technology impact

Diode is helping SMEs plan and cost sustainable fleet transitions.

Diode

The platform also includes a range of integrations, from solar feasibility assessments with live pricing to EV benefit-in-kind calculators and salary-sacrifice tools. This makes it holistic in a marketplace where EV and energy tools are often siloed.

Internally, the company has invested heavily in user-centred design to ensure the interface is usable by office managers, not just fleet or energy professionals.

The company's platform also supports stakeholder buy-in through clear, shareable dashboards and comparison tools. Employers can demonstrate total cost-of-ownership savings, emissions reductions and carbon payback timelines to staff, boards or clients – turning sustainability from a vague ambition into a tangible business case.

Growth trajectory

Diode is exploring deeper integrations. Future features include carbon budgeting tools, more granular employee impact tracking and expanded partnerships with industry bodies and infrastructure providers. It is also developing a more advanced analytics layer for fleet and property managers, helping them model the long-term implications of electrification and on-site renewables under different economic and policy scenarios.

A growing area of focus is supporting local authorities and regional business groups with decarbonisation programmes. By white-labelling its platform or offering data-sharing APIs, Diode can help public bodies engage SMEs in place-based sustainability schemes. However, scaling these capabilities will require continued access to high-quality data, close collaboration with public-sector partners, and careful navigation of evolving EV policy and funding frameworks.

Diode has invested heavily in user-centred design to ensure the interface is usable by office managers, not just fleet or energy professionals

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Ember



Scotland-based Ember is building the UK's first fully electric intercity coach operation powered by renewable energy and optimised by its own EmberOS platform. With £11m in recent funding, the firm is scaling nationwide, combining zero-emission travel with smart charging hubs and on-site generation.

Founded
2019

Specialism
Long-distance electric coach services

Headquarters
Edinburgh, UK

Website
ember.to

Ember

Driving the future of long-distance travel

Ember is on a mission to reinvent intercity coach travel by making it zero-emission from end to end. In March 2024, the Scottish operator secured **£11m in new funding** to expand its fully electric coach network across the UK. Backed by climate investors including Inven Capital and Pale Blue Dot, Ember is scaling a distinctive, vertically integrated model: electric coaches, renewable-powered hubs and a proprietary software platform, all under one roof.

The firm's Dundee transport hub was recently upgraded to 1200 kW charging capacity, supported by on-site wind energy. Future hubs will follow this model, featuring rapid chargers powered by local renewables, reducing strain on the grid and enabling overnight fleet charging at minimal carbon intensity. Having already built a strong foothold in Scotland, Ember is now planning routes into England and Wales. It's also branching into the lease market, having recently launched a new electric coach hire service for group travel – complete with live tracking and flexible booking perks.

Full-stack transport innovation

At the core of Ember's model is EmberOS, a proprietary technology platform that manages charge scheduling, route optimisation and network operations. Rather than relying on third-party software, Ember uses EmberOS to orchestrate all operations across its zero-emission fleet – coordinating vehicles, charging infrastructure and wider operational systems. This full-stack approach allows Ember to optimise services in real time and demonstrate how digital integration can reduce costs, improve reliability, and support large-scale electrification.

EmberOS uses real-time telematics, predictive charging algorithms and integrated fleet controls to ensure coaches are always fully charged for their next route, while balancing loads across the hub network. The system also manages grid interaction, storage integration and energy sourcing, maximising the use of renewables and minimising peak demand draw.



Market execution

Ember is expanding its UK footprint with new routes, hubs and vehicle partnerships.



Market innovation

The company integrates renewable-powered hubs and real-time data to optimise electric coach networks.



Technology capability

The EmberOS platform enables dynamic charging, scheduling and route optimisation for fleet operations.



Technology impact

Ember is helping to improve clean intercity mobility, with Scotland a front-runner in the adoption of zero-emission transport.

Ember

On the user side, Ember's platform offers live vehicle tracking, mobile-first booking and ultra-smooth check-in. This tech-enabled customer experience has helped Ember win repeat passengers and build brand trust in a market traditionally dominated by price.

Ember is also partnering OEMs to shape the next generation of electric coaches, offering operational insights into battery sizing, regenerative braking patterns and thermal efficiency across different route profiles.

Renewable infrastructure at scale

Ember's charging model is self-reliant. The company is building its own charging hubs, strategically located near route endpoints or overnight parking depots. These hubs are increasingly designed around co-located renewables, including wind turbines and solar arrays. By generating electricity onsite, Ember improves energy resilience, reduces emissions even further and avoids price volatility on the grid.

In the long term, Ember plans to open its hubs to other commercial EV fleets, creating shared-use depot capacity in areas underserved by traditional charging providers. This "infrastructure-as-a-service" layer could generate additional revenue, while accelerating transport decarbonisation in adjacent markets.

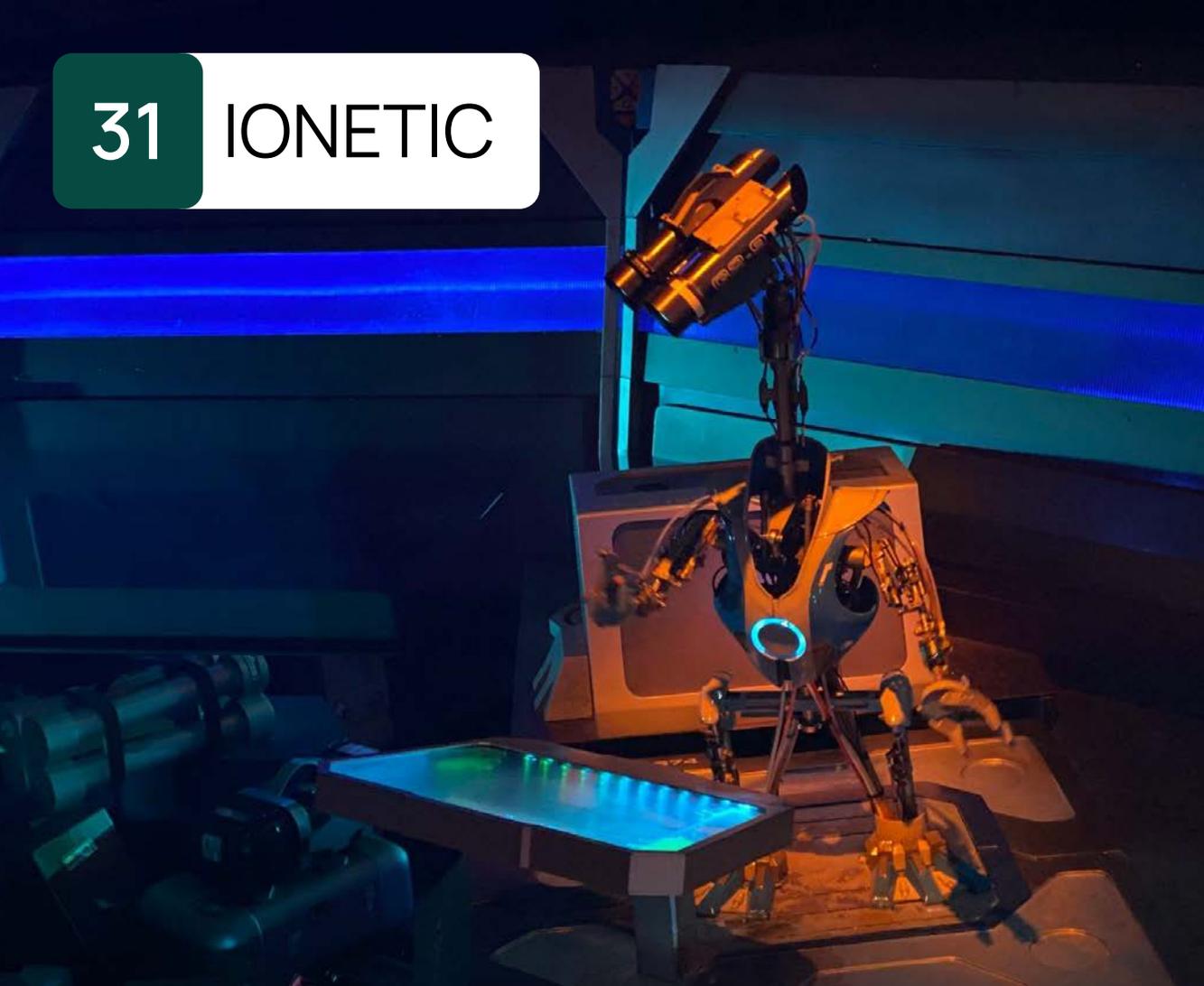
What's next

Ember's roadmap includes expansion into major UK cities, new tech partnerships, and scaling EmberOS as a platform for other operators. As pressure mounts to decarbonise intercity travel, and policy support tilts towards cleaner public transport, Ember is positioned as a first mover in a market ripe for disruption. Its combination of fleet, software and energy integration gives it flexibility and resilience.

However, sustaining this advantage will depend on access to capital, continued public-sector backing for long-distance electrification and the company's ability to maintain service reliability as operations scale. Competition from larger incumbents entering the zero-emission intercity space may also test how well Ember can protect its early lead.

Ember is positioned as a first mover and its combination of fleet, software and energy integration gives it flexibility and resilience

31 IONETIC



IONETIC is using AI and automation to reinvent how EV battery packs are developed. Its flagship Arc product aims to cut costs and time to market for bespoke battery systems. Supported by the Faraday Institution and Imperial College London, fully engineered designs can be delivered in weeks.

Founded
2022

Specialism
AI-powered EV battery design

Headquarters
London, UK

Website
ionetic.uk

IONETIC

From blueprint to battery pack

IONETIC is tackling one of the biggest bottlenecks in EV adoption: the design and development of custom battery systems. In October 2024, the UK startup launched Arc, its [AI-supported battery development platform](#), designed to slash the cost, time and complexity of bespoke battery pack engineering for OEMs.

Today, according to IONETIC, car manufacturers face a difficult trade-off: [either invest around £24m and four years into a fully custom battery, or settle for off-the-shelf packs](#) that may not meet space, performance or safety requirements. [Arc provides a third option](#) – an intelligent design system that automates pack layout, mechanical integration, thermal optimisation and BMS configuration based on customer inputs.

Arc is already demonstrating its potential to halve time to market while saving millions in development costs. Using a combination of generative design, embedded simulation and component libraries, it can generate [manufacturable battery pack designs in weeks](#), ready for validation, tooling or prototyping. That flexibility could be game-changing as the EV market fragments into more niche, and use-case-specific, vehicle platforms.

Pilot production

In February 2025, [CEO James Eaton told Reuters](#) that the company had begun production at a UK pilot plant. The launch of production at IONETIC's £5m plant in Brackley, Northamptonshire comes as IONETIC is working on battery packs for British and US car manufacturers.

Speed and scale

IONETIC's approach combines [AI-driven design automation](#) with a modular manufacturing strategy. The company's production system is configured to deliver packs for multiple clients, which reduces the typical downtime and capital cost of retooling for each new line. This makes small and mid-volume manufacturing commercially viable.



Market execution

IONETIC launched its AI-assisted Arc system to accelerate EV battery pack development.



Market innovation

Arc reduces bespoke battery time to market by 50% through automated digital design.



Technology capability

Arc combines integrated software and modular hardware to accelerate battery pack development.



Technology impact

IONETIC cuts costs for OEMs but market penetration is still developing.

IONETIC

The Arc platform is backed by funding from the Faraday Institution and Imperial College London and includes simulation and optimisation capabilities for density, thermal performance, cost and structural trade-offs. It also supports early stage trade-offs, enabling OEMs to adjust performance, size or cooling strategy before committing to a pack architecture.

This approach is particularly suited to markets like commercial vehicles, off-highway transport and emerging mobility platforms, where performance needs vary widely and off-the-shelf options often fall short. IONETIC aims to give these OEMs access to tailored, pre-validated solutions with less time, cost and development burden than a traditional Tier 1 route.

Battery innovation by design

By removing design bottlenecks, IONETIC enables manufacturers to prioritise right-sizing and integration, instead of retrofitting a “best guess” battery around existing form factors. This is particularly valuable in the context of modular and platform-based vehicle design.

IONETIC says it is already in partnership discussions with a number of OEMs – providing not just design tools, but a pathway to flexible, contract-based manufacturing. By handling both the digital development and the production interface, it is closing the loop between prototyping and delivery in a way that few battery tech firms can match.

Sector diversification

As regulatory pressure builds on OEMs to decarbonise, and as more niche use cases emerge in the electric transport ecosystem, demand for bespoke battery solutions is expected to rise sharply. However, meeting that demand will require IONETIC to balance rapid growth with quality assurance, cost-efficiency and supply chain resilience. The company is also exploring partnerships beyond automotive, including heavy-duty industrial vehicles, and positioning Arc not just as a product but as a new category: battery design as a service. In doing so, it faces the challenge of maintaining focus, while broadening its market reach.

IONETIC is exploring partnerships beyond automotive and positioning Arc not just as a product but as a new category: battery design as a service

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Lightfoot



Lightfoot's AI-powered coaching and rewards platform incentivises change to transform fleet behaviour at scale.

With major deals signed in 2025, and an expanding European footprint, Lightfoot is evolving from in-cab telematics to a full driver performance ecosystem, including next-gen AI camera solutions.

Founded
2013

Specialism
Driver behaviour tech and telematics

Headquarters
Exeter, UK

Website
lightfoot.co.uk

Lightfoot

Fleet traction

Lightfoot may have started as a driving behaviour tool, but it's shaping up to be an effective accelerator of EV transition and fleet sustainability. Following major partnership deals with [Volkswagen Financial Services Fleet](#) in April and [Drax](#) in June last year, Lightfoot is now embedded across some of the country's largest commercial fleets, from [Asda](#), [Tesco](#) and [Virgin Media O2](#) to utilities such as [South West Water](#).

The product is simple but effective: an [AI-enabled device](#) mounted on the dashboard gives real-time feedback to drivers, turning performance into points. These scores are then linked to league tables, incentives and a gamified mobile app, helping companies cut fuel use, lower emissions and improve safety, all without heavy-handed oversight.

By 2023, Lightfoot drivers had earned over [£1.3m in rewards](#), from retail discounts to insurance perks. The company is now focusing on more than £1m in annual rewards, turning fleet decarbonisation into a competition drivers want to win.

Tech meets psychology

Lightfoot's model blends hardware, software and human behaviour science. The [core device](#) connects directly to a vehicle's engine and monitors acceleration, braking, cornering and idling. Feedback is instant and non-punitive – designed to “nudge” drivers into smoother, safer habits, without the need for constant alerts or manager intervention.

The [gamification platform](#) rewards drivers who consistently hit high scores, and gives fleet managers access to back-end analytics without shaming underperformers. Lightfoot reports reductions in at-fault accidents of up to 40%, emissions cuts of up to 15%, and lower wear and tear (up to 45%), helping extend vehicle life by changing how people drive



Market execution

Lightfoot deepened its fleet footprint via Drax and VW partnerships.



Market innovation

The company is expanding its gamified driver engagement and rewards model across Europe and new sectors.



Technology capability

Lightfoot is deploying AI-based coaching and has begun testing Lightfoot Vision in fleet environments.



Technology impact

The company is delivering measurable emissions cuts and safety improvements, with strong user engagement.

Lightfoot

It is also fully integrated with [FleetWave](#), which enables transport managers to combine Lightfoot data with wider operational insights. And with [Volkswagen FS](#) now backing the solution for clients, the platform is reaching thousands of new vehicles through bundled leasing and telematics deals.

Going global

In 2025, Lightfoot began scaling across mainland Europe, supported by a refreshed executive team and new [international growth strategy](#). The company is also developing its next product wave, led by [Lightfoot Vision](#), an [AI-powered dashcam and video telematics solution](#) that combines driving data with visual intelligence for deeper contextual understanding. The system uses machine learning to identify risky behaviours, such as distraction, mobile-phone use and harsh driving events, helping fleets act before incidents occur.

[Lightfoot Vision is currently being piloted](#) with several major fleet customers and will include privacy-first features that give drivers control over how, and when, footage is shared. This builds on the company's track record of trust and user-centred design, key differentiators in a market often sceptical of in-cab surveillance.

Future prospects

With more than [100,000 drivers](#) using Lightfoot across the UK and Europe, and [major partners on board](#), the company is in a strong position to scale its platform into a full-stack driver ecosystem. While many fleet tech providers focus on emissions reporting or route efficiency, Lightfoot tackles the human layer of electrification, bridging the gap between policy and practice.

Its roadmap includes expanding its partner network and [adding new reward categories through benefit provider integrations](#). Lightfoot is also investing in research to better quantify the link between behaviour change and insurance risk. However, maintaining consistent engagement at scale and adapting to diverse regulatory, cultural and data-privacy requirements will be critical challenges as the platform grows.

With over 100,000 drivers using Lightfoot across the UK and Europe, the company is in a strong position to scale its platform into a full-stack driver ecosystem

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PoGo Charge



PoGo Charge is one of the UK's newest ultra-rapid charge point operators, scaling fast through partnerships with landlords and hospitality groups. Committed to deploying 1,000 charging points nationwide, it is building a network that blends hardware power with consumer access.

Founded
2022

Specialism
Ultra-rapid public EV charging

Headquarters
Hemel Hempstead, UK

Website
pogocharge.com

PoGo Charge

Rapid rollout

PoGo Charge is scaling quickly, installing 248 ultra-rapid chargers over a three-month sprint and targeting 4,000 charge points by 2027 – a pace that positions it among the UK's more ambitious newer entrants.

Staffing has expanded in parallel, with a 90% increase, bringing the team to 44. While small compared with established competitors, this lean structure allows PoGo to move quickly – but it will need to scale further to support national operations, maintenance and customer service.

PoGo's chargers offer power from 50 kW up to 600 kW, placing it in the ultra-rapid segment. Its partnership with LCP underlines a strategy focused on high-throughput sites, rather than blanket geographic coverage. It's a commercially driven model that can deliver strong economics but also requires careful coordination with local authorities and grid providers as the network grows.

Location-led strategy

PoGo's expansion has been enabled by several large-scale property partnerships, most notably with LCP. Phase one of the deal includes 658 ultra-rapid charge points across 89 retail sites, while a second agreement adds 254 more across 52 new sites. These locations give PoGo predictable footfall, long dwell times and retail co-location – all key drivers for ROI.

Another partnership with Kew Green Hotels is set to deliver 400 charge points across 40 hotel sites, offering PoGo access to a different segment of the EV user base. These hotel and retail deployments indicate a preference for destination charging infrastructure, where drivers combine vehicle charging with other activities.

PoGo is also a founding member of ChargeUK, aligning it with wider industry efforts to standardise regulation, payment systems and data access. And it recently joined forces with Intelli-Park to use ANPR technology to curb the habit of "ICEing" (where petrol or diesel vehicles block EV chargers).



Market execution

PoGo Charge installed 248 ultra-rapid chargers in three months and is partnering major retail property groups.



Market innovation

The company is rolling out consumer-facing charger design with integrated promotional content.



Technology capability

PoGo Charge relies on third-party software for payments, roaming and charger control.



Technology impact

PoGo Charge is enhancing public network access through hotel and retail site locations.

PoGo Charge

Driver experience

PoGo has invested in consumer-facing design – its PoGo Touch chargers include 32-inch touch screens that display tariff info, local retail offers and guidance in real time. The network is Zapmap live data-integrated, supports contactless payments and multiple roaming partners, and runs on 100% renewable energy.

The company has also gained ChargeSafe certification, with independent evaluations of accessibility, lighting and driver safety across key sites. However, it remains to be seen how well PoGo can maintain this standard as the network scales. The 24/7 support line is a strength, but the long-term challenge will lie in balancing network uptime with consistent experience across dozens of hardware models and hundreds of host sites.

PoGo operates a partner-led model, relying on specialist third parties for key parts of delivery and roaming where needed. This can speed deployment, but it may constrain differentiation in areas such as tariff design, app UX and V2G participation.

The way ahead

PoGo's rapid deployment model has, so far, relied on site access and standardised hardware integration but continued growth will hinge on grid capacity, supply chain resilience and its ability to compete on user trust as well as speed.

PoGo is focusing on retail and hospitality sites through its partner deals, which can be commercially attractive, but these high-footfall locations are also increasingly contested by other charging networks. Whether PoGo can carve out a long-term brand identity in a crowded market will depend on how well it executes in areas such as uptime, pricing transparency, customer loyalty and site design.

With a stated target of 4,000 charge points by 2027, the company faces a steep operational climb. But if it can scale without compromising service quality, it could become a key enabler of public EV adoption beyond the motorway corridor.

If PoGo Charge can scale without compromising service quality, it could become a key enabler of public EV adoption beyond the motorway corridor



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CDO2

CDO2 is pioneering real-time current density imaging for EV batteries. Supported by Innovate UK and the Advanced Propulsion Centre, and working with the University of Sussex Quantum Lab, it is part of a UKRI-funded project to commercialise quantum sensing for end-of-line battery testing.

Founded

2004

Specialism

Current density imaging and quantum-enabled diagnostics for EV batteries

Headquarters

Mayfield, East Sussex, UK

Website

cdo2.com

CDO2

Peering into the cell

CDO2's core ambition is to make visible the internal current flows within operating lithium-ion cells. Working with the [University of Sussex Quantum Technologies Lab](#), researchers have developed systems combining classical and quantum magnetic sensors to detect subtle signatures of current density across a cell. This enables diagnostic imaging during charge and discharge cycles, helping to identify irregular current paths and early indicators of faults before they escalate.

Bridging lab and industry

The partnership between CDO2 and Sussex has matured a "battery camera" concept into a production-level prototype currently undergoing active tests with a technical partner. The University of Sussex notes that the [Battery Current Density Analyser](#) has been made commercially available via CDO2. To support scale-up, the company has been awarded more than £100,000 in grants through the [Advanced Propulsion Centre's Technology Developer Accelerator Programme](#) and further backing from Innovate UK. In November 2024, it joined Innovate UK's [Global Business Innovation Programme](#) on quantum technologies, travelling to Germany with a cohort of UK firms.

That mission [introduced CDO2 to German networks](#), such as UnternehmerTUM, Munich Quantum Valley and Fraunhofer ILT. For a small UK startup, this access matters: Germany has prioritised battery technology within its national quantum strategy, making it a key market for collaboration and eventual expansion.



Market execution

CDO2 secured early R&D support and, to date, has limited market presence.



Market innovation

The company developed a distinctive imaging concept for battery diagnostics.



Technology capability

CDO2 is testing advanced current density imaging with Sussex Quantum Lab.



Technology impact

While CDO2's quantum current density sensing is promising, it is at pilot validation stage ahead of wider deployment.

CDO2

Moving into manufacturing diagnostics

In a more recent development, CDO2 has joined the UKRI-funded project Quantum sensors for end-of-line battery testing, led by Magnetic Shields Ltd. This programme is exploring how quantum sensing can be embedded into large-scale battery production, and includes CDO2 as a commercial participant. By contributing to end-of-line diagnostic modules, the company is positioning itself closer to the manufacturing environment than in its earlier lab-focused work.

Market imperative and opportunity

The wider policy environment is also moving in CDO2's favour. In 2025, the UK government announced a new £452m Battery Innovation Programme, designed to accelerate R&D and scale up next-generation battery technologies. This creates opportunities for diagnostic technologies to be trialled in partnership with cell manufacturers and quality assurance providers. If CDO2 can demonstrate reliable, scalable imaging tools, it could become a specialist supplier to OEMs, pack assemblers and testing houses.

Risks and the path ahead

Alternative methods – from thermal to acoustic diagnostics – are also competing for industry attention. But CDO2's bet is that quantum-enhanced imaging offers a level of precision that other methods cannot. Its access to the German market is an important opportunity, positioning it well in a market that is leading battery innovations – including quantum. The company has assembled strong ingredients but commercial execution remains its biggest test.

CDO2's bet is that quantum-enhanced imaging offers a level of precision others cannot, and its access to the German market is an important opportunity



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Osprey Charging

With a £110m debt facility secured in 2025, Osprey Charging has expanded rapidly and claims to be the UK's second-largest public network of ultra-rapid EV hubs. Prioritising reliability, location and user experience, it's becoming one of the UK's most trusted charging brands.

Founded
2016

Specialism
Public rapid and ultra-rapid EV charging

Headquarters
London, UK

Website
ospreycharging.co.uk

Osprey Charging

Network scale-up

Following the addition of 20 new ultra-rapid charging hubs, [Osprey Charging](#) celebrated the end of 2025 with [1,500 rapid and ultra-rapid charge points](#) – a figure it says makes Osprey the UK's second-largest network of its kind. This momentum was, in part, driven by a £110m senior debt facility from a consortium of leading lenders, including [Novuna Business Finance](#), [Societe Generale](#), [Aldermore](#) and the [UK Government's National Wealth Fund](#). Announced in July 2025, the funding will support continued rollout of [ultra-rapid charging infrastructure](#) across strategic retail, roadside and freehold locations.

In 2024, [Osprey installed over 300 new rapid and ultra-rapid charging bays](#), bringing its network to [more than 1,300 total bays](#). It also [opened 27 new ultra-rapid hubs and upgraded 16 existing sites](#) with higher-capacity points. With [150 kW-plus as standard](#), Osprey is targeting EV drivers who need reliable, high-speed charging during short breaks, rather than overnight downtime. Further expansion continued in 2025, with a [new hub added in South Wales](#) during August.

Osprey says it has adopted a "quality over quantity" model: prioritising user experience, location value and infrastructure longevity over rapid landgrab. It's a strategy that's won [Zapmap's EV Driver Recommended badge](#) five years running.

Premium locations

Osprey's go-to-market strategy depends heavily on location partnerships. In 2024, it signed new deals with railway pension investor [Railpen](#) and [the East of England Co-Op](#), bringing premium retail access to underserved EV corridors.

It also acquired two major freehold sites: one in [Paisley, Glasgow](#), the other at [Twyford Services](#). The Paisley hub opened in July 2025 and hosts 16 ultra-rapid bays. This offers the kind of high-throughput service needed as UK EV adoption continues to scale.



Market execution

Osprey secured a £110m senior debt facility and became the UK's second-largest public network for ultra-rapid charging.



Market innovation

The company expanded charging at retail sites with strong uptime and design.



Technology capability

Osprey's charging network delivers 150 kW-plus charging, using 100% renewable energy.



Technology impact

Osprey is improving public charging access and future-proofing key UK sites.

Osprey Charging

All chargers are powered by 100% renewable electricity and all are open access, compatible with every EV on the market, without subscription or app lock-in. Contactless payments and roaming via networks like Zap-Pay and Allstar are standard.

Osprey says its site strategy is designed to future-proof capacity and reliability. Each hub is built with a dedicated high-voltage grid connection and dynamic load balancing, allowing power to be shared efficiently across chargers and expanded as demand grows. The company also notes it often secures more grid capacity than initially required, reducing the risk of retrofits or queuing issues seen in less robust networks.

Industry recognition

Osprey prioritises consistency. The network maintains uptime exceeding 99%, thanks to remote diagnostics, on-site resilience protocols and rigorous asset maintenance. It is also one of the few charging firms to win Transport + Energy's Best EV Rapid Charging Network award in both 2023 and 2024, reflecting strong performance on reliability, user feedback and site design.

Behind the scenes, Osprey continues to enjoy backing from original equity investors Cube Infrastructure Fund and Investec Bank, supporting its long-term financial stability. The business is also growing its in-house team and has been certified a Great Place to Work™. The company's reputation has made it an attractive partner for local authorities, commercial landlords and motorway service operators looking to meet charging targets without compromising user experience.

Credible counterweight

As ultra-rapid charging moves from novelty to necessity, Osprey is positioning itself as a national player with local execution – a credible counterweight to oil-led incumbents and software-driven platform plays. The company is focusing growth on high-demand corridors and larger hub formats, while building fleet and retail partnerships. However, competition for prime sites is intensifying, grid connection times remain a constraint, and the capital requirements for expansion are high. With EV drivers citing reliability, location and payment simplicity as key concerns, Osprey's user-first approach resonates, but will be tested as the market scales.

Osprey's reputation makes it an attractive partner for authorities, commercial landlords and motorway service operators looking to meet charging targets

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Good Energy



Good Energy remains a credible voice for clean power. From offshore wind to EV-ready homes, the company connects supply-side transformation to everyday decarbonisation. With a new owner, Dubai-based Esyasoft, it now expects to scale faster and lean into smart grid innovation.

Founded
1999

Specialism
Renewable energy generation and supply

Headquarters
Chippenham, UK

Website
goodenergy.co.uk

Good Energy

Clean power momentum

Good Energy operates at the intersection of renewable generation, retail supply and household electrification. Rather than focusing solely on power provision, its model links clean electricity with the technologies and tariffs that shape how it is used, spanning EV charging tariffs, smart metering and time-of-use products and home solar and storage integration. This positioning allows the company to influence not just where energy comes from but how and when it is consumed, aligning supply growth with demand-side flexibility.

The company is navigating a market undergoing historic transformation. In 2024, UK renewables supplied 50.4% of the country's electricity, overtaking fossil fuels and setting a new benchmark for the energy transition. Policy signals are matching that pace. In July 2024, the UK Government announced a record £1.5bn budget for Contracts for Difference auctions – the primary funding mechanism for large-scale renewables. At the same time, Great British Energy was launched with £8.3bn of public investment, designed to scale homegrown clean electricity through public-private collaboration.

Against this backdrop, Good Energy is helping consumers, businesses and institutions to adapt. Its generation portfolio draws from sources including UK-based solar and wind assets, with 100% renewable supply for customers. But its focus, increasingly, goes beyond generation towards enabling EV integration and whole-system flexibility.

New ownership

In January 2025, Good Energy announced a new owner, Dubai-based Esyasoft. The deal to acquire the company was valued at around £100m. Explaining why it agreed to the takeover, Good Energy said being a public company had limited its ability to raise capital "to grow at the scale needed to help support the energy transition".



Market execution

Good Energy is turning renewable supply into practical household offers, including solar and storage bundles, and expanding services under new ownership.



Market innovation

The company is reframing the supplier as an electrification partner, linking clean power with flexible, customer-led consumption.



Technology capability

The firm is strengthening its digital layer with time-of-use products, smart data insight and integration for EV-ready homes.



Technology impact

Good Energy is supporting everyday decarbonisation by helping customers shift when and how they use electricity, enabling a more flexible system.

Good Energy

It also cited [conflict with shareholder, Ecotricity](#), which had a different opinion about Good Energy's business strategy. The new owner, Esyasoft, is a smart grid technology company with a goal to drive the transition towards reliable, affordable and sustainable energy.

Grid innovation

As electrification accelerates, Good Energy is investing in the technologies that connect generation to demand. From home battery integration to EV-ready tariffs, its offer reflects the reality that renewables only deliver climate benefits if matched by flexible consumption. The company also plays an advocacy role, forming partnerships with environmental non-profits, such as [Friends of the Earth](#), to run public campaigns against new coal mines or in favour of home insulation as a climate action.

Sector-wide growth

Good Energy's progress is part of a much broader clean energy boom. Since mid-2024, the UK has seen over £43.7bn in [private investment announcements](#) for low-carbon projects. The government has launched programmes, including the [£650m Fusion Futures fund](#) and new partnerships with [the Crown Estate](#), to scale offshore wind. Wind alone now supplies [29.2% of UK electricity](#), with solar contributing 5%.

At the same time, the grid itself is adapting. Good Energy is helping prepare its customer base, offering smart metering, carbon insights and products built for next-generation energy behaviour.

Expanding digital services

Good Energy's next wave of growth is expected to focus on domestic solar and storage bundles and time-of-use tariffs for EV users (including a competitive new [6.6p/kWh overnight EV tariff](#) unveiled in late 2025). With its new backer, Good Energy is well placed to benefit from growing interest in energy-as-a-service models, where the utility becomes a partner in everything, from retrofit financing to EV integration.

The grid is adapting and Good Energy is helping prepare its customer base with smart metering, carbon insights and future-facing products

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OVO Energy



OVO Energy has weathered a tough year of fiscal and regulatory scrutiny. Yet, as an early adopter of competitive tariffs, and with 4 million retail customers, OVO remains one of the UK's biggest energy suppliers, whose approach has reshaped EV-ownership economics.

Founded
2009

Specialism
Renewable energy and smart EV charging

Headquarters
Bristol, UK

Website
ovoenergy.com

OVO Energy

Price leadership

Under fire from the industry regulator, Ofgem, OVO Energy has faced a turbulent year of financial uncertainty and executive shake-ups. But the UK's fourth-biggest energy supplier – serving over 4 million customers – is attempting a comeback via restructuring designed to attract a necessary £300m of new equity. As investor talks continue, OVO Energy's turnaround plan is helped by its competitive tariff: a headline 7p/kWh partnership rate for eligible customers (a popular deal that has since changed in certain details, to the dismay of some drivers). That rate – competitive against leading smart tariffs – was made possible through OVO's Charge Anytime smart tariff, a free add-on for OVO customers that uses intelligent charging software to lower household bills without needing users to plug in at awkward hours.

Launched as part of OVO's wider strategy to support the energy transition, Charge Anytime is powered by Kaluza, its soon-to-be-sold intelligent energy platform that connects EVs, home chargers and the grid, in real time. Rather than enforcing nighttime charging windows, like Economy 7, OVO customers can plug in whenever they like. Kaluza then shifts the actual charge to the cheapest, greenest times. OVO's tariff is compatible with most EV models, including Tesla, BMW, Volkswagen and Volvo.

Strategic edge

In 2024, OVO doubled down on its EV push through a major partnership with Volkswagen Group UK, offering free miles of charging for new EV buyers across its brands, including Cupra, SEAT, Skoda, Audi and Porsche. The incentive was designed to sweeten the switch for first-time EV owners, turning smart home charging into a tangible consumer benefit.

This partnership reflects OVO's ambitions to build deeper integrations between the energy and mobility sectors. By partnering Volkswagen Group UK to link Charge Anytime incentives to new EV purchases, OVO positions itself as a utility partner – not just a supplier – at a pivotal moment in a household's switch to electric. The tariff is also aligned with current trends in the EV sector, including salary sacrifice schemes and the rise of V2G capability.



Market execution

OVO Energy pushed the EV tariff market forward by letting drivers plug in at any time, while Kaluza shifts charging to the cheapest, greenest times.



Market innovation

Kaluza offers smart scheduling and unified home/public charging.



Technology capability

OVO Energy enables solar charging, overrides and multi-brand integration.



Technology impact

With around 4 million retail customers, OVO can scale EV smart charging and influence how households charge at home.

OVO Energy

Smarter charging

Charge Anytime works through software integration between the Kaluza platform and the customer's EV or charger. Supported vehicles can charge automatically at the cheapest and greenest times, with no input from the user. The customer still sees standard rates on their bill but receives monthly credits that reflect how much smart charging has saved.

An override function is built in, allowing users to charge on demand at standard rates, if needed. It is compatible with a range of cars and chargers, from Tesla to BMW and Renault.

In September 2025, OVO announced that its OVO Charge app would become "the only app EV drivers need for charging", by bringing together public charging and Charge Anytime smart home charging into one experience. The company called this a UK-first: one app for charging at home and on the road.

In addition to providing one app for Charge Anytime and public chargers, OVO said the new app enables households with more than one EV to manage them all through a single account.

Clean credentials

OVO is also investing in its climate proposition. The company has planted 5 million trees since 2015 as part of its Plan Zero strategy, and offers an upgrade to 100% renewable electricity for £8 a month. Its broader mission to decarbonise UK homes includes insulation upgrades, smart heating plans and solar incentives.

By bringing public charging and Charge Anytime smart home charging together into one experience, OVO called its Charge app a UK first

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InstaVolt



With 1,987 live chargers, international expansion and a 362.55% CAGR, InstaVolt is one of the UK's leading ultra-rapid charging networks, built on open access and 100% renewable electricity. The opening of the Three Maids Superhub signals a shift towards premium hubs and scale.

Founded
2016

Specialism
Open-access rapid EV charging

Headquarters
Basingstoke, UK

Website
[instavolt.co.uk](https://www.instavolt.co.uk)

InstaVolt

Record growth

InstaVolt has carried its rapid-growth momentum into 2025, adding 184 new chargers in Q1 after being named the UK's fastest-growing company in the [QRESA Growth Index](#). The ranking reflects a 362.55% compound annual growth rate driven by rapid rollouts, expansion into Europe and strong uptake across fleet and public segments.

In January 2024, the company secured additional funding from [EQT Infrastructure](#), its main backer since 2022. The new investment is accelerating InstaVolt's expansion towards its 11,000 UK and Ireland charger target by 2030, with a growing focus on premium hub formats and international markets. By March 2025, InstaVolt had reached 1,987 live chargers, representing around 15% of the UK's rapid public charging market (data tracked by [Zapmap](#)). Its network is fully open access, with a pay-as-you-go model, and all chargers run on 100% renewable electricity via a partnership with [Octopus Energy](#).

Charging at scale

InstaVolt's [Three Maids Superhub](#), which opened in spring 2025, is the UK's largest ultra-rapid charging site, with over 44 bays and a range of supporting amenities. Located on the A34 corridor in Hampshire, it serves both long-distance drivers and regional fleet operators.

This reflects InstaVolt's evolving strategy: moving beyond distributed single-charger installations into [destination-led superhub development](#), combining high-throughput infrastructure with retail, food and rest facilities. The model builds on its longstanding partnerships with [McDonald's](#) and other food and retail brands, and offers a template for regional charging consolidation.

Alongside these flagship builds, the company continues to [expand its everyday network across forecourts](#), business parks and key commuter corridors. In October 2025, it began work on a "revolutionary" new EV battery storage charger located on the M6 motorway.



Market execution

InstaVolt has expanded to 1,987 chargers, representing a 15% UK market share.



Market innovation

The company has championed open-access, pay-as-you-go charging in high-traffic locations.



Technology capability

InstaVolt delivers ultra-rapid charging with contactless access and 100% renewables.



Technology impact

The firm is increasing charger availability and supporting rapid EV adoption, nationwide.

InstaVolt

International and integrated

Outside the UK, the company now operates [250-plus chargers in Iberia](#), spanning both Spain and Portugal, with sites also open in Iceland. It has ambitions to enter further European markets over the coming years, backed by EQT's international infrastructure expertise and capital.

Integration with platforms such as [Allstar](#) and roaming partnerships via [Zapmap](#) provide seamless access for business and private users. A 2025 partnership with [OVO Energy](#) offers enhanced EV driver benefits, linking public charging to smart home tariffs and broadening the appeal of flexible energy services.

Recognition and resilience

InstaVolt's customer ratings remain high, with consistently strong performance in the [Zapmap EV Driver Survey](#) and top-tier uptime rates across its network. Its chargers are known for being easy to use, clearly signposted, and rarely out of order. Its user interface remains simple: contactless, app-free and instantly functional.

The company [also supports fleet customers](#), targeting logistics, trades and field-based service businesses seeking predictable public charging options. This sits alongside continued advocacy for common standards in pricing, access and data transparency – areas InstaVolt believes are crucial for mass EV uptake.

With public charging usage now doubling year on year in some areas, InstaVolt's operational resilience and low-friction model continue to set it apart. It remains one of the few networks to successfully bridge convenience retail, roadside charging and destination energy use.

Multi-pronged growth ambitions

InstaVolt's stated goal of reaching [11,000 chargers across the UK and Ireland by 2030](#) places it at the centre of the UK's transition to all-electric travel. The company is now preparing for a multi-year phase of international growth, UK hub expansion and next-gen charger rollout. This includes higher-capacity bays, solar-integrated sites and continued work on accessibility and signage standards.

InstaVolt's stated goal of reaching 11,000 chargers across the UK and Ireland by 2030 places it at the centre of the UK's transition to all-electric travel

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bp pulse (UK)



Founded in 2008 as Chargemaster, bp pulse is bp's EV-charging infrastructure arm, operating rapid and ultra-fast chargers on UK highways, forecourts and urban hubs. It has more than 3,500 charge points nationwide and a global network aiming to reach 100,000 by 2030.

Founded

2008 (as Chargemaster, acquired by bp in 2018)

Specialism

Public EV charging infrastructure, rapid and ultra-fast charging hubs

Headquarters

Milton Keynes, UK

Website

[bppulse.co.uk](https://www.bppulse.co.uk)

bp pulse (UK)

The road to scale

Bp pulse traces its roots back to Chargemaster Ltd, established in 2008, which built one of the UK's first large public EV-charging networks under its Polar and Polar Plus brands. In 2018, bp acquired Chargemaster for about £130m, bringing the network into its broader energy and mobility strategy.

Bp then rebranded Chargemaster and Polar as unified network bp pulse, expanded its hardware and service reach, and invested heavily in ultra-fast and rapid chargers. Its portfolio now covers everything from home chargers and urban hubs to public rapid chargers on A-roads, motorways and retail destinations.

From forecourts to fast hubs

Today, bp pulse operates over 3,500 rapid and ultra-fast charge points in the UK, making it one of the country's largest networks. The company has also expanded across bp-owned forecourts, retail sites such as Marks & Spencer, and high-traffic transport hubs. But growth has not been linear. In 2024, bp pulse cut more than 10% of its workforce and scaled back activity in some markets after slower-than-expected uptake among commercial EV fleets. Despite this retrenchment, bp has reaffirmed its ambition of 100,000 global EV charging points by 2030, with its current total between 35,000 and 40,000.

Powering the model

Bp pulse runs a mixed model: public pay-as-you-go charging, subscription services (evolving from its earlier Polar Plus product) and site partnerships – including a new rollout across 14 UK retail parks. Its strategy, increasingly, hinges on rapid and ultra-fast charging, where shorter dwell times enable stronger margins. The company is also upgrading legacy equipment, pruning low-return sites, and concentrating investment on large hubs with higher usage potential.



Market execution

Bp pulse combines scale, location, reach (rapid/ultra-fast network) and parent-company leverage.



Market innovation

The company has focused more on expanding infrastructure and speed than on breakthrough software or business models.



Technology capability

Bp pulse has strong hardware rollout but customer experience and software integration remain mixed.



Technology impact

The firm combines diversified revenue streams with a growing emphasis on profitable, high-use hubs.

bp pulse (UK)

Bp pulse is also positioning itself within bp's broader energy transition strategy. Alongside traditional fuels and renewables, EV charging is framed as a growth engine that complements the oil giant's retail and convenience businesses. Ultra-fast hubs on bp forecourts encourage customers to spend time in adjacent retail outlets, creating new cross-selling opportunities. Internationally, bp pulse is scaling through joint ventures and acquisitions, including Aral Pulse in Germany and charging projects in the United States and Australia. These overseas pilots not only diversify revenue, but also provide a feedback loop, helping bp refine its UK strategy in a rapidly changing market. The combination of global reach, forecourt integration and capital intensity underscores the promise and complexity of embedding EV charging into bp's long-term business model.

Embracing partnerships

In 2023, bp pulse and Uber unveiled an agreement to accelerate Uber's commitment to become a zero-tailpipe emissions mobility platform in the US, Canada, and Europe by 2030, and globally by 2040. Meanwhile, bp pulse and Moto are collaborating to bring high-powered electric truck charging to key UK motorways.

Where EV demand meets grid flexibility

Bp pulse benefits from its parent company's capital strength, estate footprint and retail partnerships, which secure high-visibility locations and long-term tenancy advantages. Yet challenges persist. Consumer reviews regularly flag frustrations around pricing, charger reliability and app experience. Charging is also capital-intensive: uptime, maintenance and grid capacity are constant pressure points. To reach its 2030 goal profitably, bp pulse must balance expansion with operational discipline and customer service improvements.

Sharpened focus

Over the next two years, bp pulse's progress is likely to hinge on scaling its high-throughput charging hubs while improving reliability and customer experience. The decision to retrench from less profitable markets reflects sharper commercial focus but puts pressure on growth metrics. Policy frameworks around grants, planning and grid access will also prove decisive. The test will be whether the company can convert network scale into sustainable profitability, and whether its 100,000 charge points by 2030 target can be delivered.

Bp pulse's overseas pilots not only diversify revenue but also provide a feedback loop, helping bp refine its UK strategy in a rapidly changing market



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Be.EV

Be.EV is reshaping UK public charging through ultra-competitive pricing, destination-led growth and multimillion-pound backing. Focused on drivers without home charging, it pairs affordable ultra-rapid rates, reliable hubs and renewable power as everyday alternatives.

Founded
2019

Specialism
Competitively priced public charging

Headquarters
UK

Website
be-ev.co.uk

Be.EV

Price leadership

In the UK's increasingly crowded public charging market, Be.EV has emerged as one of the most aggressive price leaders, challenging the assumption that ultra-rapid charging must come at a premium. In 2025, the Manchester-based charge point operator introduced pricing as low as 39p per kWh at all of its ultra-rapid sites, undercutting competitors and bringing costs closer to home-energy economics (though there are timing and membership restrictions).

This pricing strategy is not a short-term promotion. It reflects Be.EV's belief in long-term energy procurement, high utilisation rates and site economics, enabled by careful location selection and strong financial backing. By focusing on drivers without access to home charging – a fast-growing segment of the EV population – Be.EV positions itself as a viable everyday alternative to petrol, not just a convenience top-up.

Strategic edge

Be.EV's growth is underpinned by substantial institutional support. The company is backed by up to £110m from Octopus Energy Generation's Sky Fund, alongside a £20m long-term partnership with Schroders Capital announced in May 2025. The Schroders agreement alone is expected to see 200 charging bays installed across 22 retail and leisure destinations, secured under a 20-year framework that provides revenue stability and predictable expansion.

Unlike many charge point operators competing for motorway forecourts, Be.EV has focused on repurposing underused urban land, retail parks and community locations. Flagship developments such as Manchester's £4m "Charging Oasis" and the £1m Telford Centre hub demonstrate a strategy centred on destination charging – combining high-power infrastructure with places where drivers already want to spend time.

This approach reduces land costs, increases dwell time and aligns Be.EV with local authorities and commercial landlords – all factors that the company believes give it a structural advantage as competition for prime sites intensifies.



Market execution

Institutional backing is supporting Be.EV's rapid rollout of high-use urban and retail charging hubs.



Market innovation

Low and transparent ultra-rapid pricing challenges the premium public charging model.



Technology capability

Be.EV's destination-led ultra-rapid hubs prioritise reliability, uptime and roaming compatibility.



Technology impact

The firm's renewable-powered urban hubs improve grid efficiency and accelerate transport decarbonisation.

Be.EV

Smarter charging, simpler experience

Be.EV has positioned its proposition as driver first. Its network prioritises reliability, rapid charging speeds and straightforward payment, with compatibility across major roaming platforms and fleet providers. By integrating with aggregators such as Paua and expanding roaming access, Be.EV ensures its chargers are visible and usable across multiple apps and fleet systems, rather than locked into a closed ecosystem.

Operationally, the company also places strong emphasis on uptime and customer experience, reasoning that reliability – not charger count alone – is what drives repeat use. Its hubs are designed for high throughput, reducing queueing and improving utilisation during peak periods.

Clean credentials and system impact

Be.EV's backing by Octopus Energy Generation gives it an advantage in renewable energy alignment. The network is supplied with renewable electricity, reinforcing its role in decarbonising transport without simply shifting emissions upstream.

At a system level, Be.EV's strategy supports broader grid and planning objectives. By building high-capacity hubs in urban and retail environments – rather than dispersing low-utilisation chargers – the company contributes to more efficient grid connections and better asset use. Developments like the Manchester “Charging Oasis” are increasingly viewed by councils as regeneration assets, rather than pure infrastructure.

Prospects

As EV adoption accelerates, Be.EV is betting that price competitiveness, site quality and execution speed will give it an edge. The company has a target of 1,600 charge points, and its challenge is execution at scale: securing grid connections and high-quality sites fast enough to maintain reliability and utilisation while price competition intensifies. As it rolls out its network, Be.EV is transitioning from a high-growth challenger to a strategically significant national operator.

Be.EV's approach reinforces trust at a time when public charging prices remain a key barrier to widespread EV adoption

Ones to watch

Evata

Evata, a UK-based startup, is tackling one of the toughest barriers to fleet electrification: charging access. In February 2024, it launched a fleet infrastructure sharing platform, designed around portable charging solutions that can be hosted at third-party sites. This model helps fleet operators overcome limitations of the public network, reducing costs and downtime, while improving access. By partnering site hosts and fleet operators, Evata enables flexible, scalable charging infrastructure that supports commercial electrification. In May 2025, UK trade and training body the Association of Fleet Professionals (AFP) appointed Evata to develop a platform that allows its members to share their EV charging facilities on a nationwide basis.

Paua

In just five years, Paua has become one of the UK's most comprehensive business EV charging platforms, offering fleets roaming access to more than 70,000 connectors. In September 2025, it added 850 new locations and 3,500 connectors by bringing Blink Charging into its network. Paua's fleet-first digital model consolidates usage into a single app, card and invoice – streamlining costs for operators, while supporting vehicles from taxis to heavy-duty trucks. By integrating more than 45 networks, from Roam Charging to Be.EV, and forging partnerships with E.ON Drive and Applegreen Electric, Paua now covers 85% of motorway service areas. Government trials, including the DfT-backed PINS project, highlight Paua's system-level approach and growing role in the national charging infrastructure.

Reserve & Charge

UK-based Reserve & Charge is an EV infrastructure platform that enables advanced reservations for public charge points, with real-time availability updates. It integrates with charging station management systems and propagates data to EV apps, aiming to reduce wait times and improve utilisation of chargers. Analysts cite this kind of charging reservation tech as key to smoothing peak demand in public EV networks, alleviating driver anxiety in the process. The platform is co-funded by EIT Urban Mobility, an initiative from the European Institute of Innovation and Technology, as a demand management platform demonstration.

Rightcharge

Rightcharge simplifies the transition to electric mobility for mixed petrol, diesel and EV fleets. In April 2025, it partnered Right Fuel Card to launch an integrated electric fuel card, giving businesses one platform to manage all fuelling and charging costs. With access to 82,000 charge points across 39 networks – covering 70% of the UK's infrastructure – Rightcharge unifies public charging, home charging and cost-tracking in a single system. Its fleet-first model reduces administrative overheads, while providing insights for electrification planning. In October 2025, it secured £1.6m in seed funding and aims to use the funding to accelerate expansion across Europe.

Ones to watch

Believ

In June 2025, EV charge point operator [Believ secured a £300m investment](#) to accelerate the rollout of public charging across the UK. With Virgin Media O2 as delivery partner, Believ plans to install 30,000 new chargers, focusing on on-street residential locations, rapid and ultra-rapid hubs and underserved rural areas. The funding, led by joint owners Liberty Global and Zouk Capital, with support from Santander, ABN Amro, NatWest and MUFG, positions Believ as one of the country's best-backed charge point operators. Recent contract wins for Believ include [Suffolk County Council](#), with a commitment to introducing 6,000 charge points.

Source

[Source](#) operates one of London's largest EV charging networks, with more than 1,700 charge points powered by 100% renewable energy. A 50/50 joint venture between [energy partners SSE and TotalEnergies](#), Source is building a charging infrastructure designed to support drivers, businesses and fleets as the transition to electrification accelerates. In 2025, Source opened its first ultra-rapid charging hub at [Ocean Terminal in Edinburgh](#), the first of more than 300 planned to appear across the UK and Ireland by 2030. Source has also formed [roaming and platform partnerships](#) – including with OVO, Octopus Electroverse, Last Mile Solutions and Plugsurfing – enabling drivers to find and use its ultra-rapid hubs through apps and payment methods.

WeFlex

[WeFlex](#), which provides rental and rent-to-buy EVs for ride-hailing and delivery drivers, [secured a £40m debt funding facility from LCM Partners](#) in 2023 to finance 1,300 new EVs, expanding its fleet beyond [2,500 vehicles](#). Demand for zero-emission cars in the ride-hailing sector continues to outstrip supply, and WeFlex is addressing this need through strategic partnerships, including [a £7m fully-electric fleet deal with Toyota](#). To date, WeFlex has delivered 90 million zero-emission miles, built a 50-strong team, and has a strong customer service rating. In 2025, WeFlex [joined the Electric London coalition](#), an alliance lobbying for the capital's transition to EVs.

ClearWatt

[ClearWatt](#) is building a software-led trust layer for the used-EV market, combining battery-health diagnostics with market intelligence to help consumers, retailers and fleets to price vehicles more confidently. Its app-based testing model – demonstrated through its [EV Health Test](#) and [EV Check](#) tools – translates complex battery data into clearer insights on real-world range and resale value, without requiring additional hardware. In December 2024, ClearWatt secured investment from NextEnergy Group's [NextSTEP venture capital fund](#), supporting further platform development. More recently, it introduced an enhanced [battery scorecard](#) to improve transparency for second-hand EV buyers and fleet operators as adoption increases.

Electric 40 methodology

The electric mobility sector is undergoing a fundamental transformation, driven by software, data and AI. To recognise and evaluate the companies leading this change, Futurice developed the Electric 40, a comprehensive ranking of the top 40 companies driving innovation and impact across the electric mobility transition, with a specific focus on digitalisation.

The Electric 40 identifies and showcases the most innovative digital-first companies accelerating the shift to electric transport. The ranking focuses on UK-headquartered businesses, as well as companies with a strong operational base in the UK, while recognising their expansion and influence across European and global markets.

It highlights organisations where software, data and AI are central to their offering – companies using digital innovation to reshape how electric vehicles, charging infrastructure, fleet systems and battery ecosystems are deployed, managed and optimised.

Unlike hardware-led mobility solutions (such as vehicle manufacturing or charge point production), this ranking focuses specifically on companies where digital capabilities are the primary driver of impact and value. This approach ensures strong alignment with Futurice's expertise in digital transformation, while maintaining a clear and focused scope for evaluation.

The framework accommodates both established scale-ups and innovative startups, balancing local market dynamics with international scalability and enabling fair comparisons across different company sizes and maturity levels.

Which companies are included?

- Companies delivering digital-first solutions across EV charging, fleet electrification, battery intelligence and mobility energy management.
- Businesses using AI, software or data platforms as core to their service offering.
- Firms enabling optimisation, utilisation, flexibility and performance across electric mobility systems.
- Organisations at any stage of growth that demonstrate strong digital innovation.

Which companies are excluded?

- Hardware-focused manufacturers (for example, vehicles, charge points, battery hardware).
- Automotive OEMs.
- Traditional fleet or leasing operators without digital differentiation.
- Hydrogen or alternative fuel mobility providers.
- Carbon accounting or offset platforms.
- Climate finance solutions.
- Infrastructure asset owners, unless their proposition is heavily software led.

Scoring framework

Companies are assessed across four key metrics:

Market execution – how effectively a company delivers its solution at commercial scale.

Market innovation – originality in business model, proposition and market approach.

Technology capability – the strength and sophistication of its digital and software offering.

Technology impact – the measurable influence of its solutions on accelerating electric mobility adoption and system efficiency.

This structured framework enables a consistent and qualitative evaluation of digital electric mobility companies, adaptable across national contexts and capable of capturing both current performance and future potential.

Each metric is scored using a five-point scale:

- 
1 = Minimal
- 
2 = Limited
- 
3 = Moderate
- 
4 = Advanced
- 
5 = World class

Contact us

We are Futurice, a digital transformation company.

We help our clients solve their biggest challenges and empower them to make a positive impact on the world. The smart application of data, AI and business strategy allows us to create and sustain future-capable solutions.

We work across industries from energy, automotive and construction, to media, finance and retail – and many more.

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