THE VOICE OF EV CHARGING

CHARGEUK

Streetworks for EV charging

CHARGEUK

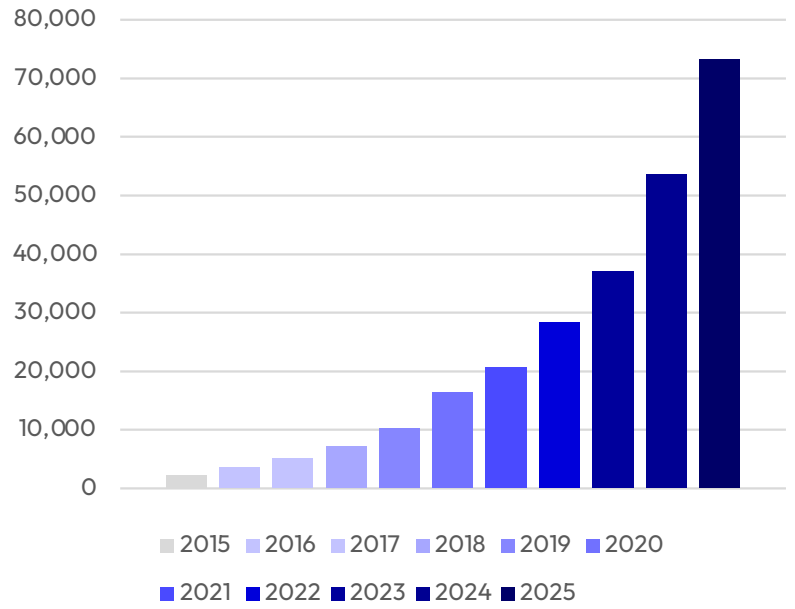
The voice of the UK's electric vehicle charging industry

- 40+ members, representing 70% of market
- From operators of on-street charge points to service providers, manufacturers and more...
- £6 billion in investment in charging infrastructure by 2030

About the public EV charging sector

- Public EV charging is a rapidly growing, competitive sector – but with a long track record of delivery.
- As of January 2026, there were 88,000+ public charge points in the UK, with about 50% of these deployed in partnership with local authorities. There are a further 1.6m+ deployed at homes and workplaces[1].
- Major on-street charging operators include Shell Recharge Ubitricity, Believ, char.gy and Connected Kerb, each with more than 1,000 charge points in their network[2].
- The sector is currently estimated to employ around 4,000 people in the UK, with projection of more than 30,000 by 2030[3].

Public charge points in the UK[4]



Sources: 1 &2: Zapmap; 3: Roland Berger; 4: DfT & Zapmap

Every charge point deployed is a significant, long-term investment

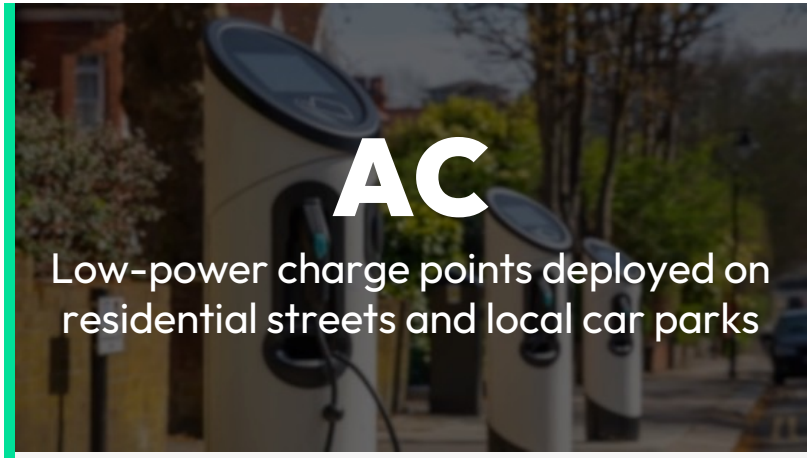
Each new deployment represents a significant capital investment – typically thousands or tens of thousands even before enabling works.

Utilisation rates are key to ensuring return on investment - charge points only generate a profit when reliably and consistently in use. Unused or duplicative infrastructure directly costs the operator.

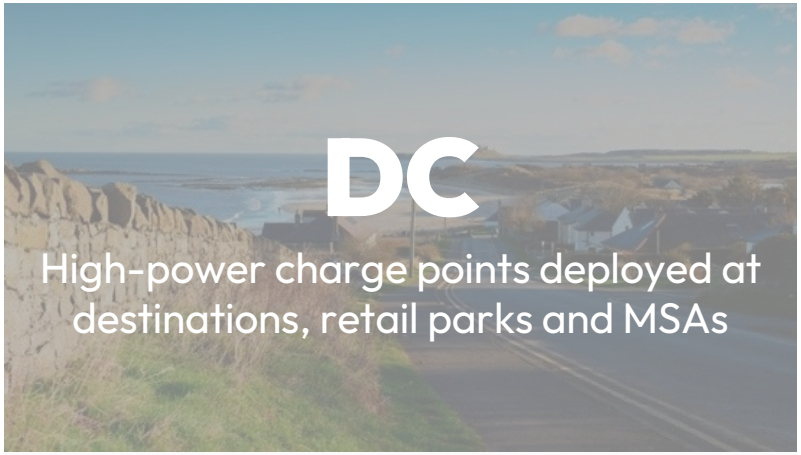
To justify an investment, a CPO must be confident that:

a. the type, number and locations of charge points at each site are scaled to real-world demand
b. each device is deployed properly and kept in working condition

Public charging can be divided into two halves



- Deployed on public land in conjunction with the Local Authority
- LAs typically contract with a single CPO; deployed under close, ongoing LA/CPO collaboration



- Deployed on private land in conjunction with landowners
- DC operators generally already access Street Manager via existing Independent Connection Providers (ICPs)

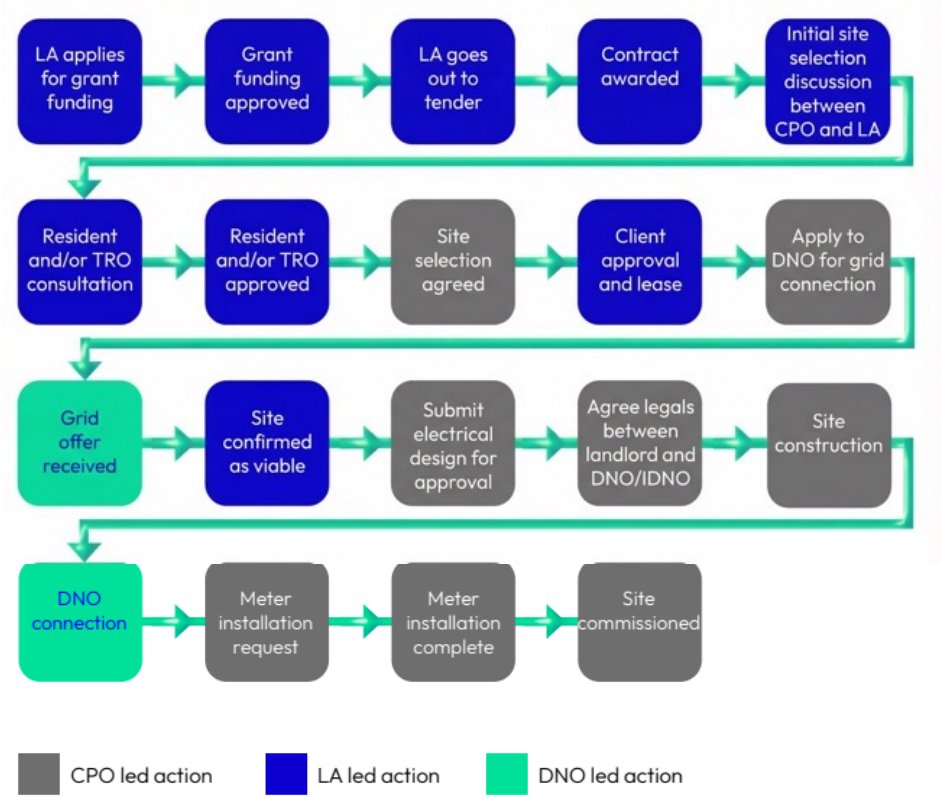
Street works changes will primarily affect AC charging – though DC operators will see visibility benefits

AC CPs are deployed as part of contracts between CPOs and LAs – chiefly LEVI in 2026-2030 period

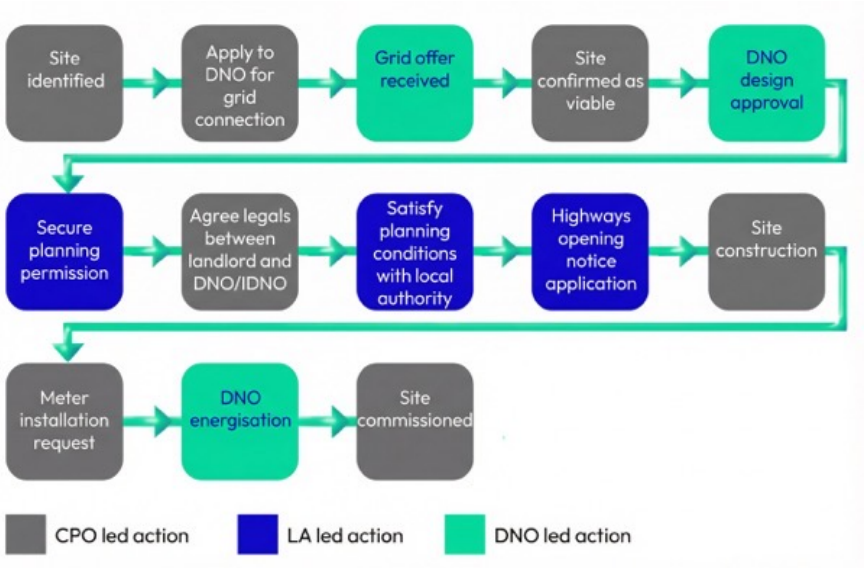
- Under the Local EV Infrastructure Fund, Government has granted £300m+ to LAs to deploy 100k charge points – predominantly on local, residential streets – in partnership with CPOs.
- In many cases, Local Authorities will sign contracts with a single CPO to deploy infrastructure in their area – in a few cases with a handful of CPOs. In these latter cases, CPOs will not generally deploy on the same streets – instead deploying different types of infrastructure across the LA area.
- Charge points deployed under LEVI are subject to procurement contracts and close, ongoing collaboration between the CPO and the LA.

Charge point deployment is a complex, collaborative process between CPOs, LAs and DNOs

AC charging



DC charging



Street works permits come relatively late in the process, and are just one stage gate for CPO deployment

Planning & agreement

Delivery

1

Procurement & contract award

LA defines tender, sets KPIs and selects CPO from competitive procurement process.

Long-term contract specifies works standards, maintenance obligations & penalties for non-compliance.

2

Site selection

CPO and LA jointly identify and agree locations based on demand, safety and accessibility.

Includes land registry checks, highway consents and initial grid connection quote.

3

Design & technical approval

LA signs off on design before any ground is broken, including Road Safety Audit, TOPO and GPRS surveys.

4

Planning & street works permits

CPO applies for necessary planning permissions and street works permits, coordinating with the LA highways team.

5

Commissioning

LA quality officers inspect completed works and sign off before sites go live.

Other mitigations

1 Contractual safeguards

- CPO contracts oblige ongoing maintenance for 10–20 years, with provisions for re-appointment or adoption.
- Local Authorities retain oversight throughout, with provisions for asset transfer or removal if an operator exits.

2 Protecting existing infrastructure

- Members have years of experience excavating on the public highway under Section 50 licences, working safely around buried utilities throughout.
- Protecting electrical cabling is directly in CPOs' interest — it is fundamental to operations.

3 Contractors

CPOs use NRSWA-compliant contractors, many of whom also carry out work for utilities companies.

Examples include:

CONWAY great people : great work

ELECTRICAL TESTING

ENERVEO

VolkerHighways

M GROUP

Our offer

- We have a shared interest in ensuring the street works regime continues to work effectively – our long-term success relies on high-quality work, good relationships and public confidence.
- We are keen to build an ongoing relationship with highways authorities and the utilities sector as we enter the regime.
- We are open to developing joint guidance, training or a Memorandum of Understanding — and to other ideas you may have.

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