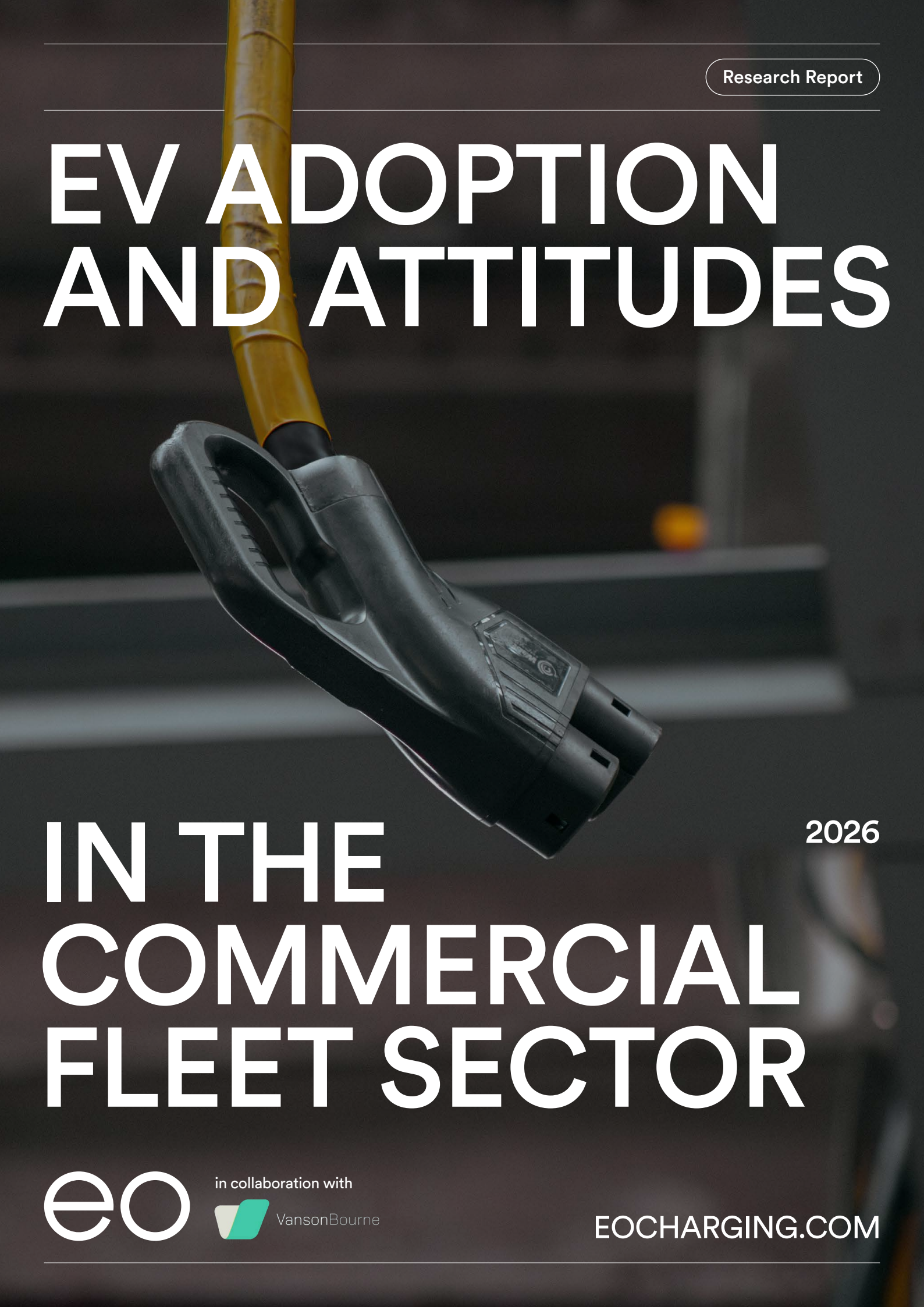
Research Report

EV ADOPTION AND ATTITUDES IN THE COMMERCIAL FLEET SECTOR

2026



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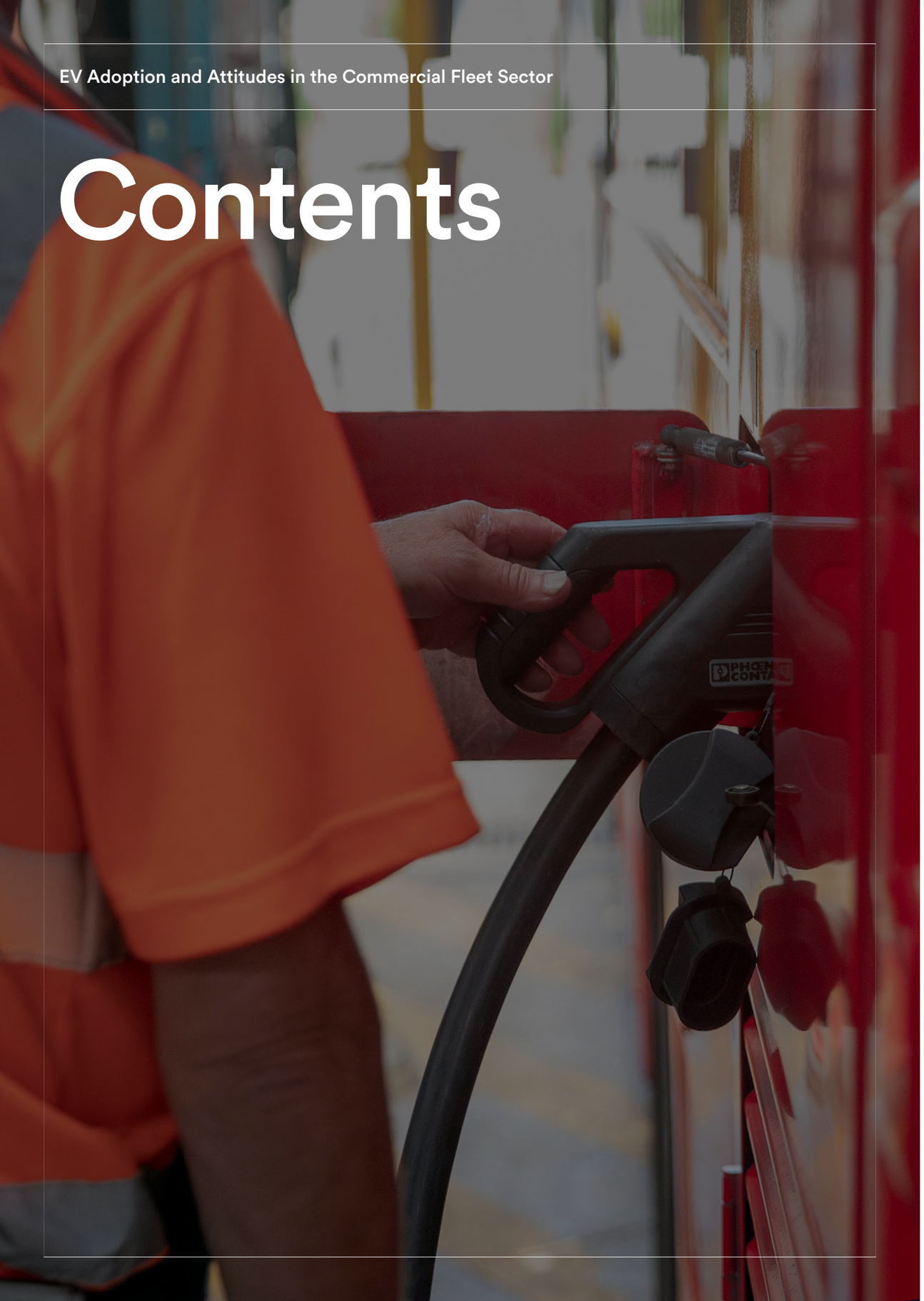

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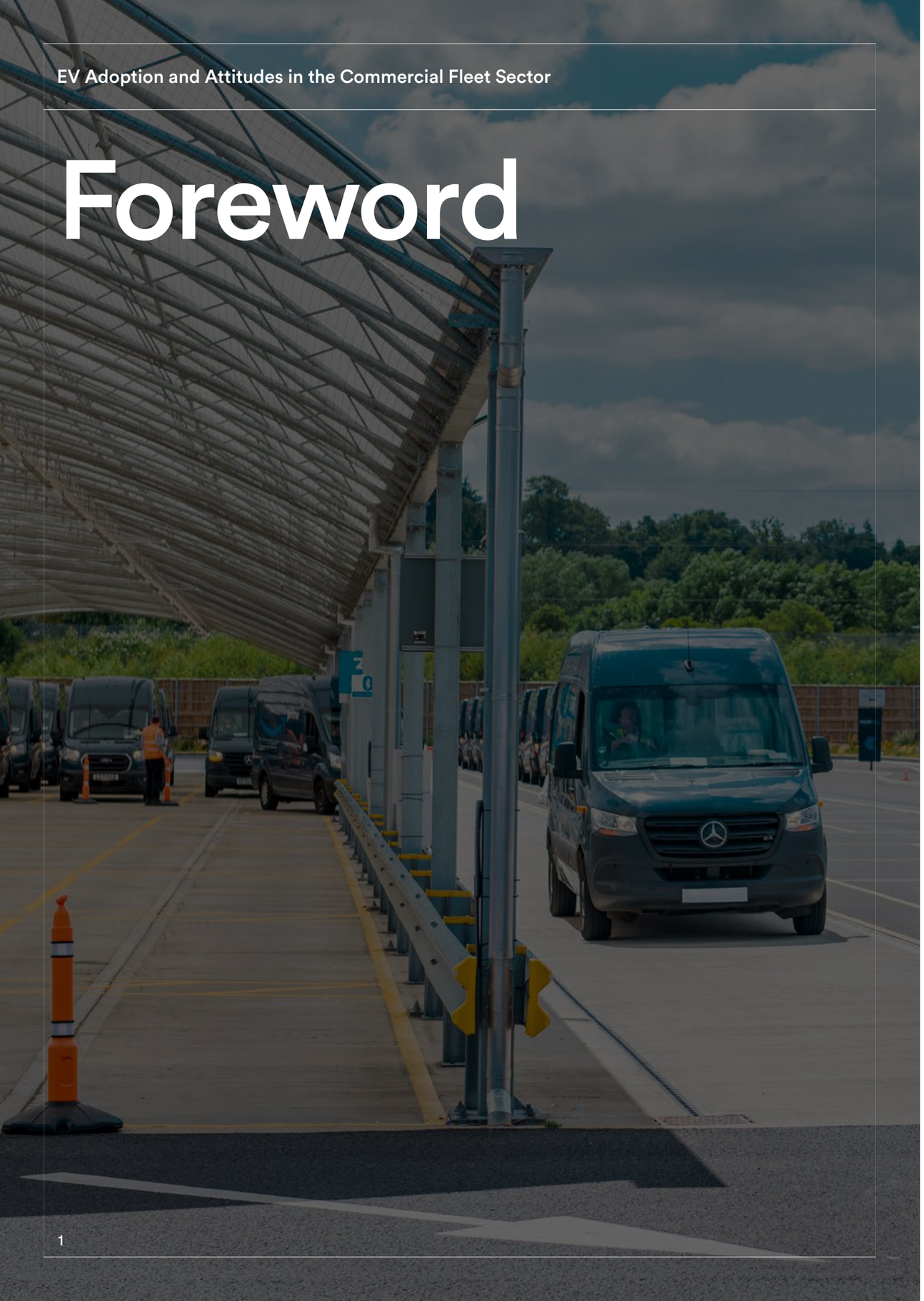
Foreword



Fleet electrification has reached a point where results speak louder than predictions. Across both corporate and government sectors, total cost of ownership parity, and in many cases clear financial advantage, is already being achieved. The debate about whether electrification makes business sense is no longer theoretical. The evidence is in the field, in daily operations, and on balance sheets.

Our earliest adopters, the Pioneers, proved what many once questioned. They accepted the upfront investment, strengthened internal capabilities, and committed to new operating models. Their experience demonstrates that when electrification is approached with discipline, long-term planning, and the right partners, it delivers a measurable return. These organisations have de-risked the path for everyone who follows.

The Navigators are now the companies best positioned to accelerate. They have the strategy, the scale, and the organisational readiness to electrify at pace. What they need next is clarity on national infrastructure and regulation, a stronger handle on data, and a commitment to maturing their financial and operational models. With these in place, their potential to unlock value is significant.

The broader market is also entering a new phase of realism. A decade of learning has replaced early misconceptions about cost, infrastructure, and day-to-day operational readiness. EV fleets are already demonstrating lower maintenance costs, improved vehicle utilisation, more predictable long-term economics, and greater resilience. Public sector bodies achieving TCO advantage at scale only reinforce the conclusion: electrification is not simply an environmental commitment, it is a strategic business decision.

The task ahead is to execute with precision. The next chapter of electrification will belong to those who can combine strategy, infrastructure readiness, data intelligence, and skilled teams into a single, coherent operating model. It will require strong partners, robust planning, and a mindset shift from pilot activity to scaled delivery.

This report has been designed to support that transition. It clarifies where the market is today, where organisations are falling behind, and where the strongest returns will be captured. Most importantly, it makes clear that electrification is no longer a question of feasibility, it is a question of execution.

The organisations that act decisively now will shape the competitive landscape for the decade ahead. Those that hesitate will find themselves reacting to standards set by others. The opportunity is real, the economics are strengthening, and the organisations that move with purpose will secure lasting commercial and operational advantage.

Richard Staveley
CEO, **EO Charging**

Executive Summary

The electrification of commercial fleets has reached a pivotal moment. What began as ambitious endeavours is now a mainstream business strategy, with more than half (53%) of organisations' fleets being electrified on average. Behind this momentum lies a powerful mix of motivations: financial savings, ESG (Environmental, Social, and Governance) commitments, a favourable regulatory environment and the desire to build a more responsible reputation. Today, the vast majority (84%) of organisations are at least partially implementing a net-zero transportation initiative, clear evidence that electrification is no longer just about meeting targets but about driving transformation.

Yet this progress marks only the beginning. The first major challenge is bridging the operational gap, as organisations encounter practical barriers in running their commercial EV fleet - from high upfront costs (42%) to difficulties in integrating EVs with existing systems (38%) and availability of charging infrastructure (36%).

The economics of electrification also remain complex. While cost efficiency is a top driver (54%), many organisations are cautious about the total cost of ownership (TCO).

To bring these dynamics to life, we have identified three distinct fleet electrification personas that capture different stages of maturity - from early-stage experimenters to those operating fully electrified fleets. Each group faces different priorities and challenges, underlining that electrification strategies must evolve as organisations progress.

Pioneers

Early adopters with fully electrified fleets and a formal, fully implemented net-zero transport initiative. They led the charge but are now encountering the reality of scaling without sufficient infrastructure, planning, or internal capability.

Navigators

Actively transitioning to electrified fleets with a partially implemented net-zero transport initiative. They are moving with intent, but the pace of change brings operational pressure and capability challenges. Despite this, they remain optimistic, motivated by cost and customer expectations.

Transformers

Early-stage experimenters, trialling EVs in select parts of their fleet with a partially implemented net-zero initiative. While they are the least advanced in terms of rollout, they are the most optimistic, ambitious, and growth-focused.

Among them, Pioneers, who have already scaled their fleets, are among the least likely to perceive financial operational benefits (33% vs 70% of Transformers respectively), suggesting that rapid adoption without the right infrastructure, data, and financial expertise can dilute returns. What's more, given the desire to still pursue electrification, these Pioneers are looking to redevelop or refine their strategies in the next 1-2 years to get themselves back on track (47% vs 32% of Transformers respectively). To address this, around half (51%) of organisations are turning to new investment models such as Charging-as-a-Service (CaaS), which help reduce upfront investment and provide a more predictable path to ROI.

Alongside infrastructure and cost, people and skills are emerging as another decisive factor. Almost every (99.7%) organisation reports skills gaps in the capabilities needed to sustain electrification - from EV maintenance (35%) and fleet performance analytics (30%) to financial modelling (29%) and effective driver training (27%). These gaps can slow progress and, in fully electrified fleets, limit the ability to prove ROI. Closing them requires investment in training and, increasingly, collaboration with partners who can embed operations, maintenance, and expertise into service delivery from the outset.

Looking ahead, organisations are focusing on the areas that will accelerate scale: refining their roadmaps (46%) and strengthening data and reporting capabilities (45%) over the next 2-3 years, and over the next 3-5 years expanding charging infrastructure (45%). The intent is clear, but the real test lies in turning ambition into action.

Stategy Blueprint

To support this we have developed a blueprint for action, available to read at the end of each section.

By combining strategy, infrastructure, and operational excellence, this roadmap sets out how organisations can overcome barriers, scale effectively, and capture the full financial, operational, and environmental promise of electrification.

Electrification in Motion - The Strategic Mindset Driving Change

Fleet electrification has evolved from an aspirational goal into a strategic business priority. Across industries, organisations are moving beyond pilot schemes and small-scale trials, embracing electrification as a core pillar of their long-term strategy. On average, more than half (53%) of commercial fleets (LCV, HGV, Last Mile Delivery) are already electrified, a clear sign that the transition is gathering pace.

This shift is being reinforced by formal commitments and external government regulation to sustainability. Most organisations (84%) have already at least partially introduced a net-zero transportation initiative, with the remainder planning to follow suit. Together, these actions highlight a decisive turning point: electrification is no longer confined to small portions of early adopters. It's becoming a defining feature of how forward-looking businesses balance financial performance, environmental responsibility, and brand reputation.

The motivations for fleet electrification are multi-layered: on one level, it helps meet ESG goals and address rising external pressures from regulators and customers. Beneath that, there's a harder-edged business case emerging. Companies see electrification as a route to long-term efficiency, a safeguard against volatile operating costs, and a way to sharpen their competitive edge whilst maintaining business continuity.

Top drivers for implementing a formal net-zero transportation initiative:

54%

Say cost savings or long-term financial benefits

51%

Say corporate sustainability or ESG goals

44%

Say brand reputation and market differenciation

This combination of financial, environmental, and reputational incentives shows that electrification is not just about meeting targets - it's about building stronger, more competitive organisations for the future. Yet this shift also marks a critical turning point. Businesses are committing to the journey, but many remain in the early stages of delivery - and moving too quickly without the right infrastructure, systems, or planning risks operational setbacks, inefficiencies, and missed expectations down the line.

For Pioneers, this turning point is already well underway. Having progressed from pilots and small-scale trials to full-scale fleet electrification, their priorities are shifting. With nearly half (47%) planning to refine or redefine their strategies within the next one to two years, it's clear that success at scale demands a new approach. Their experience offers a valuable lesson for the wider market: ambition is essential, but it must be matched by the agility to evolve as electrification matures.

As this momentum accelerates, a critical question emerges: how can organisations translate intent into impact while navigating the challenges that come with scaling electrification?

Case Study

Metroline Electrification Journey

Patrick Warner
Head of Zero-Emssion Transformation, **Metroline**

How to Develop an Effective Fleet Electrification Strategy

With a combined fleet of over 1,800 buses, Metroline works closely with key partners including Transport for London and Transport for Greater Manchester to provide bus services for millions of passengers across hundreds of routes in London and Greater Manchester.

Here, Patrick Warner, Head of Zero-emission Transformation at Metroline, discusses how the company has approached electrification in recent years, including lessons learned and advice for operators about to embark on electrifying their fleets.

Q: Can you give us a brief overview of your electrification journey to date and your focus areas for the next 12-24 months?

It took us seven years to electrify the first half of our fleet, but we have accelerated the pace significantly in the last year. Looking ahead, our focus is going to be on where power becomes available, and we have multiple garages that will go fully electric this year, and many more buses will be on the streets.

Additionally, at present we have different screens for different vehicles and different charging systems - but we're thinking about if we can get all of this into one view and streamline some of the information to get the best out of it in the future.

Q: How do you typically approach your electrification strategy for Metroline across its depots?

We have a principal contractor method, so whoever is running the site for us from an EV perspective manages everything. They manage other contractors that are doing civil works or bringing power to site, and they are also increasingly looking to source the power for us in the first instance.

Q: When you think about the anatomy of successful fleet electrification, what are the key elements that are required?

Clarity of vision is really important. If we are going to juggle multiple live sites we need to lean on the people with the experience and the connections to help us do it faster. Understanding the way we use our own vehicles is the biggest guide and ensuring our supplier partners understand exactly what we expect from these vehicles and our infrastructure is equally important.

Q: Our data found the following cited as the top challenges for running at EV fleet. Is this consistent with your experience?

a. 42% say high upfront costs for vehicles and infrastructure
b. 38% say integrating EVs with fleet management systems and data reporting
c. 36% availability of fast charging infrastructure
d. 34% say adjusting our usual ways of working to fit the needs of running an EV fleet

Yes, this is definitely all consistent with our experience. Infrastructure and how long that lasts is certainly a big issue. We inherited quite a mixed portfolio of charging infrastructure; we have vehicles with multiple different systems and so telematics is a big consideration at the moment.

Q: What have been the biggest operational differences between running an EV fleet vs. a traditional fuel fleet?

Historically, we have bought a diesel off the shelf, and as long as you top it back up again it will carry on doing what you expect of it. However, EVs are clearly not like that. On some of the more

challenging duty cycles, we need more vehicles to do the same work, and as the vehicle ages the charge times take longer and the range starts to degrade.

Everything is a learning curve for the whole team, and we are learning fast all of the time. Take our engineers, for example. They are used to working with internal combustion engines but have had to start again and learn to work with zero emission technology. There are similarly big changes that have to be adjusted to for drivers and in the maintenance team.

Q: For fleet managers starting their electrification journey, what advice would you give them to successfully manage this transition?

Try and design the whole garage to be fit for purpose right from the start and be really clear about how you are going to do it. That means getting input and buy-in from the people who live with these sites on a daily basis. An employer will seek key employees to consistently steps up to act as the on-site lead and day-to-day advocate. Financial analysis is also really key, and that is something we have equally approached with rigour to simplify processes as far as possible.

Public vs Private

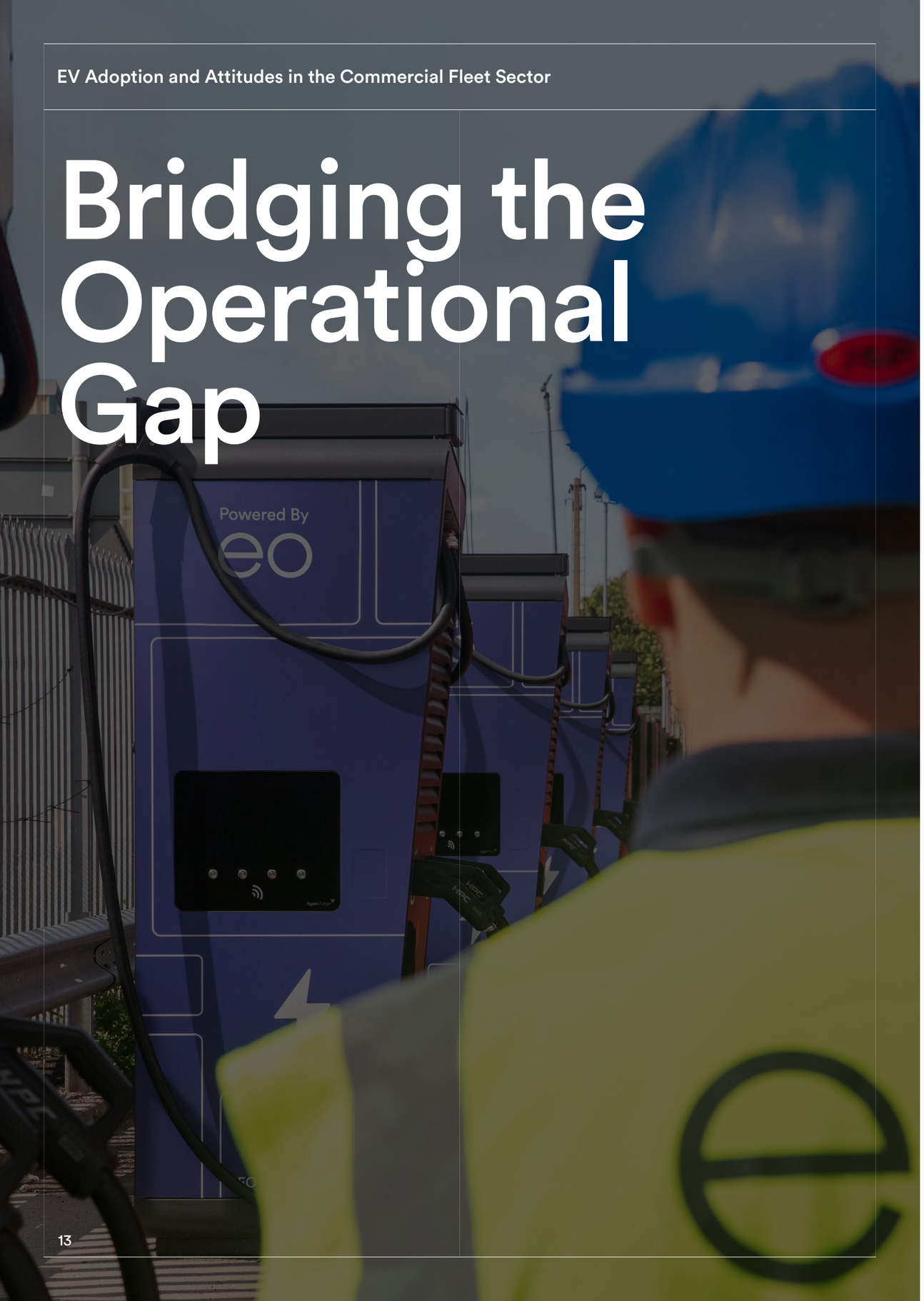
Public sector organisations are more than twice as likely to have a fully implemented net-zero transportation initiative (47%) than their private sector counterparts (23%). While motivation is broadly similar across both groups, those in the public sector are more likely to cite brand reputation and market differentiation (53% vs. 43% private), whereas the top motivation for the private sector is persuing cost saving or long-term financial benefits (53%). This likely reflects the heightened scrutiny public sector organisations face, with regulatory requirements and government mandates playing a stronger role (41% vs. 38% private), making policy alignment, reputation management, and demonstrating market leadership especially critical.

Fleet electrification is now firmly embedded in corporate strategy, driven by a balance of financial, environmental, and reputational priorities. But as adoption scales, the focus must shift from ambition to execution, ensuring that infrastructure, planning, and strategy evolve in step. The next challenge lies in turning strategy into seamless, efficient day-to-day operations.

Stategy Blueprint

Key Activities	Pioneers	Navigators	Transformers
Identify Main Driver for the Continued Roll-out	What key benefits have been learnt from the roll outs to date?	What is the long term objective?	What is the long term objective?
		What is the key driver (or finding from pilot phase) that triggered the move to BAU?	
Identify Executive Sponsor	Who is responsible for the continued electrification?	Who is responsible for the existing role out?	Who is responsible for pioneering the change programme within the organisation?
	Are responsibilities clear across multiple departments?	Is additional support required?	Does the sponsor have Change Management Skills e.g. Adkar Awareness, Desire, Knowledge, Ability, Reinforcement?
Confirm Scope of Electrification	How many sites have been electrified, how many are in progress, how many are yet to be electrified?	How many sites have been electrified, how many are in progress, how many are yet to be electrified?	How many sites are expected to be electrified initially?
	How many BEVs are on the fleet, how many more are to be purchased, what is the ratio of BEV / ICE?	How many BEVs are on the fleet, how many more are to be purchased, what is the ratio of BEV / ICE?	What is the plan for subsequent sites e.g. site #2, site #3?
	In which order will sites be electrified?	In which order will sites be electrified?	What is the transition from 0%BEV to 100%BEV?
	What are the key challenges for the difficult sites?	What are the key challenges for the difficult sites?	
	What is the staging of the vehicle and site roll out?	What is the staging of the vehicle and site roll out?	What is the staging of the vehicle and site roll out?
	What about other parts of the fleet e.g. long distance, public charging, charging at home?		
Identify Budget	What are the expected costs?	What are the expected costs?	What are the expected costs?
	How will the site electrification be paid for?	How will the site electrification be paid for?	How will the site electrification be paid for?
	How will the vehicles be paid for?	How will the vehicles be paid for?	How will the vehicles be paid for?
	What are the software costs?	What are the software costs?	What are the software costs?
	What are the maintenance costs?	What are the maintenance costs?	What are the maintenance costs?
Get Sign-off	Is the board happy to continue?	Is the board happy with the current electrification plans?	Is the board happy to commence electrification?
	What will success look like?	What would success look like?	What would success look like?
	What would trigger the next phase of electrification?	What data is required to be captured to show a success?	What data is required to be captured to show a success?

Bridging the Operational Gap



As electrification gathers momentum, the focus shifts from intent to execution. Scaling electric fleets requires more than new vehicles - it demands robust infrastructure, seamless integration with existing systems, and smarter digital tools to keep operations running smoothly. For many, this is where ambition meets complexity.

Despite strong commitment, the day-to-day realities of running and transitioning to an electric fleet are exposing roadblocks that can slow or even stall progress. High upfront costs, patchy access to charging infrastructure (for example, on-site and en route), immature technology and the challenge of adapting established workflows to new technologies are all common hurdles. These pressures affect not just current operations but also the ability to scale with confidence.

Top operational challenges when running commercial EV fleets:

42% say high upfront costs for vehicles and infrastructure

38% say integrating EVs with fleet management systems and data reporting

36% say availability of fast charging infrastructure

34% say adjusting our usual ways of working to fit the needs of running an EV fleet

The challenges also vary depending on where organisations are in their journey. Pioneers, who have already electrified at scale, are most likely to be struggling with challenges such as ensuring drivers have the day-to-day skills needed to operate EVs (47%) or frustrations with the availability of fast charging infrastructure (40%). By contrast, Navigators, those in active transition, are more likely to point to integration headaches whereby they are struggling to align EVs with existing fleet management and data systems (46%). These shifting operational pain points reveal a clear pattern: as organisations progress, technical and logistical complexities replace early-stage planning hurdles, reinforcing the need for adaptive strategies that mature alongside their fleets.

Alongside these operational pressures, many organisations are also constrained by a less visible but equally critical barrier: the skills needed to support and sustain electrification. While this will be explored in detail later in the report, it is important to recognise that workforce capability underpins the success of every stage of the transition.

Public vs Private

While high upfront costs for vehicles and infrastructure remain the top challenge for both sectors, public organisations tend to report fewer difficulties with integrating EVs into fleet management systems and data reporting (29% vs. 40% private), or with adapting their operations to support EV use (24% vs. 35% private). This may reflect their relative maturity; many public sector fleets began electrifying earlier and have already invested in system integration and operational adjustments.

However, public sector organisations are more likely to highlight limitations in charging infrastructure, both on-site and across routes (38% vs. 30% private). This likely stems from the continuous utilisation of many public vehicles, such as buses or service fleets, which rely on dependable overnight depot charging and sufficient daytime availability to maintain operational schedules.

The Impact of Policy Uncertainty:

Momentum around electrification is strong, but confidence is fragile when shifting government policies make it difficult for fleets to plan with certainty. Around eight in ten organisations (81%) say that policy fluctuations are undermining their ability to map long-term strategies, while over half (54%) admit they are not planning strategies beyond the current administration. For many, the risk of investing heavily today only to find the rules rewritten tomorrow is proving a major brake on ambition.

Shifting compliance deadlines and evolving reporting requirements create confusion and disrupt long-term planning, from procurement cycles to investment. Three-quarters of organisations (75%) even see the lack of clear guidance on compliance and reporting as a direct barrier to electrification. Across Europe, new regulations on alternative fuels and infrastructure, cybersecurity standards, and the phased retirement of zero-emission bus mandates are adding further uncertainty.

However, there are encouraging signs of progress, particularly in the UK, where the new Industrial Strategy has provided clearer direction on decarbonisation targets and policy timelines. This greater clarity gives organisations a firmer foundation to plan against, provided they stay proactive. Regularly reviewing government guidance, engaging with industry bodies, and working closely with manufacturers and energy partners can help fleets anticipate regulatory shifts and adapt their strategies accordingly.

Policy instability also amplifies pressures elsewhere. Volatile energy markets are reshaping the financial case for electrification, with 88% of UK respondents saying fluctuating prices are making it harder to prove the financial case for transitioning to electric vehicles. At the same time, 80% point to global tensions as raising risks around sourcing critical components such as batteries.

The path to large-scale electrification is proving as complex operationally as it is strategically, with infrastructure gaps, integration hurdles, and shifting policy landscapes testing even the most committed organisations. Yet beneath these challenges lies a crucial consideration: the economics of electrification. Understanding the total cost of ownership will be key to proving the long-term value of the transition and sustaining momentum at scale.

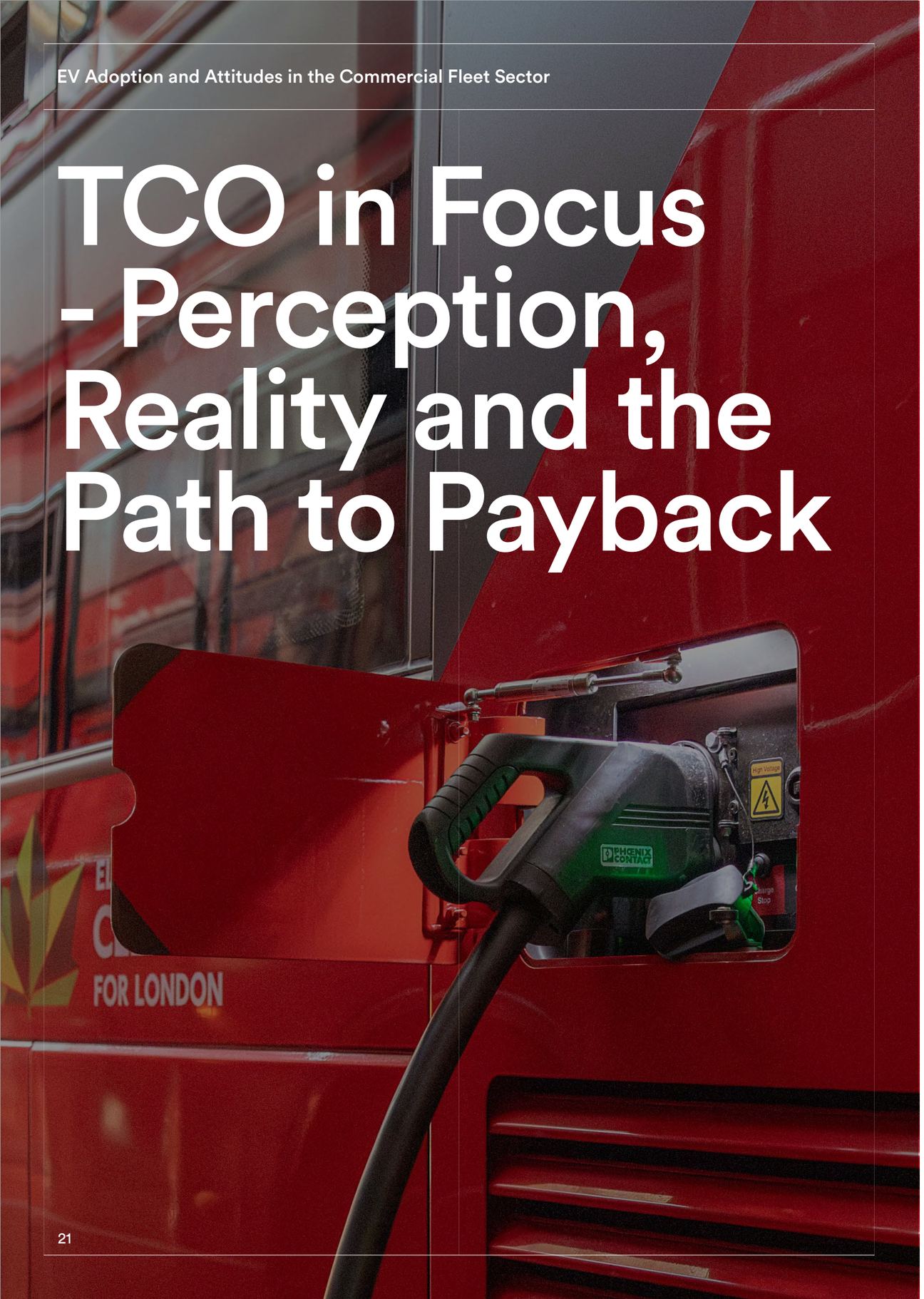
Operations Blueprint

Key Activities	Pioneers	Navigators	Transformers
Processes and Practices	What processes are causing pain points?	What processes and practices need to be captured from the Pilot phase?	What is the e2e flow of an ICE vehicle? * include finance, maintenance, drivers, refuelling, HR, safety, vehicle emergency recovery
	What needs to be refined and optimised?	What processes and practices need to be rolled out across all sites?	
		How are competing priorities (operations vs sustainability) being balanced?	What can be accommodated in the short term for initial roll out?
Mixed Fleet	Will the fleet ever transition to 100% BEV?	What common processes are there for both ICE & BEV?	What are the key differences between the ICE&BEV fleets? What needs to be adopted on each pilot site?
	What is stopping 100% electrification?		What impact is there on site if some parking bays are electrified?
Identify Roll-out Strategy	How will the transition be phased? A few vehicles on one site, or an entire site done first?	What difference processes are there for ICE and BEV?	What difference processes are there for ICE and BEV?
	Who will build the master plan of who will do what and when?	What proportion of the estate will remain ICE Vs BEV?	What proportion of the estate will remain ICE Vs BEV?
Identify the Sites	What sites are remaining to be electrified? Indentify the why and the when as well.	Identify which sites are to be electrified.	Identify which sites are to be electrified.
	What are the challenges for each site?	What are the challenges for each site?	What are the challenges for each site?
Identify People Impacted	Which categories of employees will be impacted? drivers, refuellers, maintenance, site owners, fleet owners, fire marshalls, etc	Which categories of employees will be impacted? drivers, refuellers, maintenance, site owners, fleet owners, fire marshalls, etc	Which categories of employees will be impacted? drivers, refuellers, maintenance, site owners, fleet owners, fire marshalls, etc
			How will we measure readiness to begin our first pilot?
	What sub contractors or partners will be impacted?		What training or cultural shifts are needed before rollout?
Map the Operations across the Year	Are the different challenges across the seasons being handled successfully?	Are the different challenges across the seasons being handled successfully?	Review expected vehicle routes and charging dwell time across the year. BEVs behave differently in winter and so the site may need different routes or operating procedures in the winter compared to the summer.
		Is there a feedback mechanism between pilot and rollout teams?	

Review Electricity Costs	
	What cost reduction options are suitable for consideration?
Safety	What are the lessons learnt so far? What needs to change?
Lessons Learnt	Perform lessons learnt on existing sites.
Data and Metrics	What metrics are required to prove that the electrification is working as expected?
	What day-to-day data is required?
	What long-term data is required?
External Marketing	Are there long-term benefits that can be advertised?
Internal Marketing	How can this be used as a tool to help build awareness and acceptance for change?
Technology	What technical features are available with the selected vehicles and charging stations?
Maintenance	What maintenance do the vehicles and infrastructure require?
	Is the existing O&M package suitable for on going needs?
Business Criticality	What happens if the vehicles don't charge?
	What is the back up if it fails?

What tariffs are available?	What tariffs are available?
What options are available for smart charging to reduce costs?	What options are available for smart charging to reduce costs?
Are there options for depot sharing?	Are there options for depot sharing?
What cost reduction options are suitable for consideration?	Do any electricity reduction costs need to be considered at this stage?
What are the lessons learnt so far? What needs to change?	Have the appropriate risk assessments and corrective action plans been put in place?
	Have all new processes been considered (e.g. charging, maintenance, etc)?
	What fire practices need to be modified?
Perform lessons learnt on existing sites.	Are there any friendly customers or industry partners that could provide a depot tour and give their lessons learnt?
What metrics are required to prove that the electrification is working as expected?	What metrics are required to prove that the electrification is working as expected?
What day-to-day data is required?	What day-to-day data is required?
What long-term data is required?	What long-term data is required?
Is it possible to highlight the benefits of the initial migration and that greater electrification is coming?	Do we want to advertise this?
	Do the vehicles need special branding?
How can this be used as a tool to help build awareness and acceptance for change?	Build an internal stakeholders communication plan.
	What is the scope of communication?
What happens if the initial phases results in legacy charging stations and vehicles?	What happens if the pilot phase results in legacy charging stations and vehicles?
Are the technical roadmaps of charging stations and vehicles aligned?	Are the technical roadmaps of charging stations and vehicles aligned?
What is the risk of charging stations or vehicles being isolated due to technical obsolesence?	What is the risk of charging stations or vehicles being isolated due to technical obsolesence?
Who can provide the appropriate support and maintenance package?	Who can provide the appropriate support and maintenance package?
Is the existing O&M package suitable for on going needs?	What is included in the support package?
	What spares are required?
Who can ensure that the vehicles will be charged >99% of the time?	Who can ensure that the vehicles will be charged >99% of the time?
What is the back up if it fails?	What is the back up if it fails?

TCO in Focus - Perception, Reality and the Path to Payback



EV adoption is widely regarded as a smart investment, with the potential to deliver lasting cost savings making good business sense. Lower fuel and operating costs, combined with government incentives and subsidies, strengthen the financial case for electrification - and, as highlighted earlier, cost efficiency is one of the most common drivers for organisations making the switch to electric vehicles.

Financial outcomes expected as a result of transitioning to electric vehicles:

42% say high upfront costs for vehicles and infrastructure

36% say availability of fast charging infrastructure

> “Operationally, many of our projects are proving it is a far more efficient model. There are challenges around reliability because the technology changes so quickly.
>
> Fuel is cheaper, but it depends on power strategy, how you secure power, how you procure vehicles. EVs are far more expensive initially and there is the question of lifespan compared to diesel.”
>
> **Joe Keaney**
> Head of Infrastructure & Facilities, Go Ahead

Yet the reality of measuring TCO is proving more complex. Financial benefits are not guaranteed, and expectations vary depending on where organisations are in their journey. Despite having already made the transition, Pioneers are considerably less likely to perceive financial benefits around operational/fuel costs than their Transformer counterparts (33% vs 70% respectively).

This could explain why Pioneers (40%) are more likely to cite TCO analysis and financial modelling as a skills gap compared to navigators (24%) or visionaries (19%). Although they matured quickly in terms of electrification, initial CAPEX into areas such as building their own charging infrastructure may not have paid off. Building stronger analytical skills could therefore be a critical enabler of future investment confidence and measurable ROI.

One way that organisations are looking to ease the challenges of TCO is by exploring more flexible models that spread the burden and reduce risk – either when starting their programmes or expanding existing ones. Around half of organisations (51%) are now turning to Charging-as-a-Service (CaaS), a figure that rises to nearly two-thirds (64%) among those with fully electrified fleets as they look for ways to optimise costs. By shifting infrastructure from a capital expense to a managed service, these models not only reduce upfront investment and provide more predictable running costs but also give organisations the confidence to scale electrification without being held back by infrastructure ownership.

Case Study

Austrian Post Electrification Journey

Paul Janacek
SVP Group Fleet,
Austrian Post

Q: Please can you introduce yourself and your role at Austrian Post?

My name is Paul Janacek, and I was working for Austrian Post for a decade in the fleet environment. My background prior to that was in finance, working for more than 20 years in the finance industry, including at Deutsche Telekom for a long period. I joined Austrian Post in 2015 starting as project manager and then head of finance for the new Group Central Unit. I was awarded a Head of Fleet role in 2019 and was then responsible for last mile deliveries of around 10,000 vehicles up to 3.5 tons. My main responsibility coming into the fleet environment was to find a clear path towards electrification in the last mile.

Q: Could you give us an overview of the electrification journey at Austrian Post and what the focus areas were initially and where they are today?

Our electrification journey started early. In 2012, the board decided to invest in the first small number of battery-electric vehicles. The first years were a hard but necessary learning curve. By 2016, we had roughly 500 BEVs operating in last-mile delivery.

At Austrian Post, the longest delivery route is around 150 km per day. We started where it was most manageable: city districts with short daily ranges roughly 5 to 15 miles and then expanded step by step. Vehicle development and innovation improved range, reliability, and suitability for duty cycles, which ultimately enabled fully electric delivery nationwide.

A key shift came in 2017, when we established a central fleet department and moved strongly into data and fleet systems. That gave us a deep operational view: what is actually repaired, how often vehicles are down, and what the real drivers of maintenance cost are. In an ICE fleet, a six-year-old vehicle typically goes to the garage three to six times per year for damages or technical issues. With BEVs, we saw almost nothing in comparison often just tyres and annual inspections. After years of operating BEVs at scale, that was a real mindset change.

That operational evidence and the TCO impact led to a strategic decision in 2019: to go fully electric by 2030. We joined The Climate Group and made a public commitment with a binding timeline. From 2019 onward, the focus broadened beyond fleet alone: the organisation aligned around full electrification, and we moved to 100% zero-emission acquisition from 2022 onward.

We were in a special position because we already had a strong mobility team and property management capabilities with experience in electricity management. Together, we developed the year-by-year learning curve on infrastructure: what to install, how to standardise, how to scale rollout, what the grid can supply, what capacity to secure, and how to use available charging windows effectively.

That's where the broader energy ecosystem really materialised especially between 2020 and 2025. In last-mile delivery, operational disruptions are part of daily reality: damages, breakdowns, keeping vehicles running. With a fleet of around 8,000 LCVs, the maintenance burden is enormous in a traditional model so improving reliability and lowering downtime is not a side benefit, it's a core value driver.

This was continuous learning: piloting, adapting, and then scaling what works. By the end of 2025, we reached roughly 60% electrification with about 4,000 charge points in operation. And when you look at results especially running costs the vehicles get cheaper day by day.

From my perspective, the industry is now mature enough to go fully electric for LCV fleets. The benefits compound over time: lower operating costs, further savings potential in energy optimisation, and a much longer expected vehicle lifetime in many cases significantly longer than ICE. Of course, there are difficulties including grid outages but that's part of the game when you scale a real operational system.

Q: When did you first start to see parity or better coming in, how you were initially measuring it, and what were the first indicators that you were on a path to achieving it?

I call it the slow death of the TCO debate. Headlines often focus on purchase price - "too expensive, won't pay back." But if someone argues that purely on acquisition cost, it usually shows they don't understand fleet management. You don't justify decisions by sticker price. You justify them by TCO over the full operating life and that takes time, data, and operational learning.

We had an advantage because we were early and had years of real-world fleet experience, so we measured the transition using TCO and tracked the key cost blocks. The first indicators that we were on the right path came in three steps:

1. Maintenance was the first clear proof.

   In a combustion fleet, you invest heavily in maintenance because things regularly break or wear out. For us, maintenance costs dropped noticeably in the first years. And even before the full fleet matured, the best-performing segments already showed up to ~50% savings versus comparable ICE operations.

2. Energy became the second big lever even in "worst case" duty cycles.

   Last-mile delivery is stop-and-go all day. That's not the environment where diesel looks efficient. With EVs, the longer you run them, the cheaper they get, especially when you combine smart charging with cheap energy windows and onsite generation like solar on depots. In our case, energy economics also moved toward ~50% savings in the strongest scenarios.

3. Lifetime and capital efficiency is the third wave and it's underestimated today.

   What really materialised over the last few years is that BEVs can stay in operation 10–12 years, while combustion vehicles are often exchanged after 6–7 years. That changes everything in terms of cost of capital and depreciation logic. One major pitfall I see in the industry is applying ICE-style leasing thinking (5–6 years) to BEVs. For last-mile logistics, the investment curve is longer ~10 years of operation is a much more realistic baseline.

Once you treat BEVs as long-life assets, you can stack additional value: grid optimisation, charging when power is cheaper (e.g., night windows), and longer term flexibility options like bi-directional charging. At Austrian Post, that combination has already translated into meaningful operational savings of double-digit percent, so this is no longer only an ecological argument.

Of course, the first headache for any large fleet is the upfront phase: vehicle capex / leasing rates, then charging infrastructure. Early on you need significant cash and a solid plan. But my message has been consistent: it costs more at the start; if you design it properly and tailor the system to your fleet, the long-run P&L structure improves, and the technology does not have to be more expensive than diesel.

Q: When it comes to careful planning and the procurement, which areas do you feel the market maybe takes for granted or knows least about?

The biggest blind spot in the market is procurement done in silos - vehicles on one side, charging infrastructure on the other, and energy / operations somewhere "later." In reality, you need a holistic approach because only an end-to-end view allows a credible calculation of the full energy ecosystem and the operational implications.

A good example is AC charging hardware. In a tender, you can get very attractive prices quickly. If a standard wallbox is, say, €500, and another bidder offers €300, it looks like a strong win on paper. But the key question is: what are you really buying? Reliability, quality, serviceability, spare parts availability, warranty handling, cybersecurity, software compatibility - and ultimately uptime - matter far more than the unit price.

That's why the "best bidder" is often not the best partner. It's fine to experiment in pilots, but when you scale in logistics, you don't need cheap components - you need dependable partnerships with vendors who understand fleet operations and can support you over the full lifecycle.

In short: the market underestimates how quickly procurement savings evaporate if quality and integration are wrong - and how much value is created when procurement is anchored in a complete, operationally grounded TCO view.

Q: If you were speaking to a business that's similar to Austrian Post, what would be the top three recommendations that you would tell someone in a similar role to you?

1. Get your ICE baseline right; with real, defensible TCO.

   Before you compare anything, you must know your true cost of operating ICE vehicles: maintenance, downtime, fuel, repairs, internal handling effort, and replacement cycles. Many fleets underestimate this. If you don't have a clean ICE baseline, every EV debate becomes emotional instead of economic.

2. Understand operations at "day-by-day distribution" level; not just the maximum route.

   Don't plan around the outliers. Map what your fleet actually does across a typical week: route lengths, dwell times, depot returns, seasonal patterns, and how many vehicles sit idle when. The key is the distribution of usage, not the single longest route; that's where right-sizing vehicles and charging becomes precise and scalable.

3. Treat electrification as a competitiveness decision, not a sustainability project.

   If you want to stay competitive in logistics and last-mile operations, you need a credible pathway to electrification. Otherwise you'll carry a structural cost disadvantage over time. Done carefully and tailored to real operations, EVs become a cost and performance advantage; not just an ecological one.

Public vs Private

Those in the private sector are more likely to anticipate reduced operational or fuel costs from their EV transition (45% vs. 26% public), reflecting a stronger focus on efficiency and ROI. In the public sector, as seen earlier, skills gaps in data analytics and fleet performance monitoring may mean organisations are less able to track and quantify efficiencies - leaving them less aware of the cost benefits electrification could deliver.

When it comes to funding the private sector leans towards market-based, outsourced models to accelerate infrastructure rollout and minimise ownership costs (e.g. CaaS 54% and lease models 48%), while the public sector depends more on government grants and subsidies (35%), self-funding (44%), and public partnerships (38%) - approaches shaped by policy alignment and tighter budget controls.

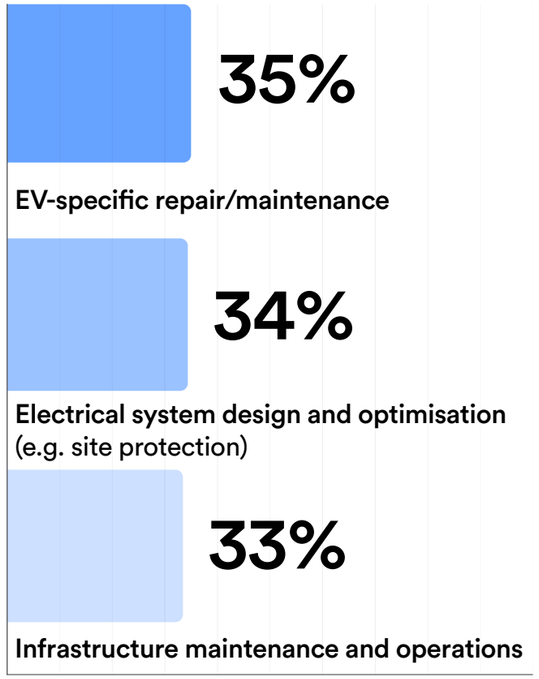
Finance Blueprint

Key Activities	Pioneers	Navigators	Transformers
ROI	Is the Return on Invesment as expected?	What are the unexpected costs?	What are the costs?
	What is the BEV:ICE TCO ratio?	What are the costs savings over ICE?	What are the savings?
	Are there new revenue opportunities such as Depot Sharing and Smart Charging?	Are there new revenue opportunities such as Depot Sharing and Smart Charging?	What subsidies are available?
		Consider 3rd party charging e.g. suppliers?	What is the training budget?
			Are the BEVs accounted for differently compared to ICEs?
			What taxes are applicable?

The Skills Shortage Behind the Wheel

Electrification success depends on people just as much as technology, yet almost all (99.7%) organisations report a shortfall in the skills needed to make it work. These gaps span every level of the fleet, from drivers on the frontline to technicians and managers shaping long-term strategy.

Biggest skill gaps in fleet electrification:



Other consistent gaps respondents pointed out are data analytics and fleet performance monitoring (30%), total cost of ownership analysis and financial modelling (29%) or training drivers to use EVs efficiently/effectively (27%).

Some of the most pressing challenges centre on data and finance. Without strong analytics and performance monitoring, organisations struggle to track efficiency, optimise charging, or spot issues before they escalate - all of which are essential to running an EV fleet effectively. The same applies to financial expertise: accurate TCO modelling is critical to evidencing savings and building confidence in ROI. Gaps around financial expertise exist across the board but are particularly pronounced among those with fully electrified fleets (41%) - a reminder that as organisations move further on their journey, the skills required to sustain momentum become more complex.

At the same time, driver capability remains a practical challenge. Three in ten (30%) organisations say ensuring drivers have the day-to-day skills to operate EVs is one of their biggest hurdles. Shifting to electric requires new habits - from managing charging schedules to adapting driving styles - and the organisations that get this right are better placed to unlock efficiency and safety benefits.

> “We are using software tools to help educate the business. We are visualising charging positions and understanding risk during the night. We are trying to give them tools to help them move forward. Ownership will keep moving as we electrify more. We have now electrified 40% of our London fleet, and will continue to electrify throughout 2026 and beyond.
>
> Training has leaned on the software partner. At local level, it is how they operate the fleet. The super users are accountable for the vehicles going out fully charged. That sits with the operational company, not central.
>
> **Joe Keaney**
> Head of Infrastructure & Facilities, Go Ahead

Building Capabilities Through Partnerships

As fleets scale up electrification, closing the skills gap has become the next critical frontier. Training programmes, online resources, and access to industry best practices are helping, but without deeper expertise organisations risk slowing their progress - or losing competitiveness as the transition accelerates.

Actions being taken to address the skills gaps:

49%

say targeted training programmes for staff

47%

say access to industry best practices and case studies

46%

say online resources, toolkits, or e-learning modules

The challenge is that many of the most in-demand capabilities - from driver readiness to financial modelling - are not always available in-house. Building them internally can be costly and time-consuming, leaving organisations searching for alternative ways to access the support they need. Working with vehicle manufacturers or charging partners, who can provide specialist technical knowledge, offers access to maintenance expertise or financial insight that could otherwise take years to develop.

This is also reshaping how capability is delivered. Rather than expecting teams to master multiple systems themselves, many are considering models where operations and maintenance are built in from the start. These partnerships create a single point of accountability, reduce complexity, and give organisations confidence that their fleets will perform reliably at scale. It's also why models like Charging-as-a-Service (CaaS) are gaining ground - combining infrastructure with ongoing service so that businesses can focus on running their fleets, not managing every detail behind them.

Public vs Private

Public sector organisations are far more likely to report shortages in data analytics and fleet performance monitoring expertise (44% vs. 28% private). This is likely linked to stricter budget and hiring constraints, which make it harder to attract or retain specialist talent - limiting their ability to optimise fleets, measure progress, and demonstrate impact.

Private sector organisations are more likely to tackle skills gaps through internal measures such as targeted training (49%), e-learning (47%), and regulatory clarity (45%), reflecting their need to move quickly and maximise ROI. By contrast, public sector organisations lean more on peer networking (47%), government-funded initiatives (41%) - an approach shaped by tighter budgets and closer alignment with government policy. As a result, the private sector may close gaps faster, while the public sector builds broader ecosystems but risks slower progress.

Skills Blueprint

Key Activities	Pioneers	Navigators	Transformers
Identify Training Required	What practices need to be updated and rolled out?	What practices need to be updated and rolled out?	What would a comprehensive all hands training look like?
	What skills gaps have come to light recently and how are they being filled?	What skills gaps have come to light recently and how are they being filled?	Map out all teams that are impacted by the pilot.
	Are EV champions being identified and promoted?	Are EV champions being identified and promoted?	Do the first aiders know how to address electrical wounds?
			Do the finance team know how to handle the costs of EVs and how to depreciate them?
			Do the drivers know how to use the vehicles?
			Do the fire marshalls know what to do in the event of a fire?
How to Capture Internal Knowledge and Share with the Wider Organisation	Is the internal knowledge base being updated and used as a tool for change within the organisation?	How can the knowledge base from the pilot be shared with the wider organisation?	How can the knowledge base from the pilot be shared with the wider organisation?

Scaling with Purpose - Embedding Electrification

With electrification already well underway, the focus is shifting from adoption to scale. The question is no longer whether to electrify, but how to embed EVs seamlessly into business operations in a way that delivers lasting value. That means going beyond vehicles to strengthen infrastructure, harness smarter data, and refine strategies that deliver both efficiency and environmental impact.

The priorities for acceleration are clear: faster, more reliable charging, stronger data and analytics, and affordable infrastructure. These mirror the challenges seen earlier in this report and highlight that the barriers which once slowed adoption now define the path to scale. Overcoming them is essential to unlocking the efficiency, confidence, and momentum needed for electrification's next phase.

When asked what would most help accelerate their EV charging, organisations pointed to improvement across a variety of areas. Some are:

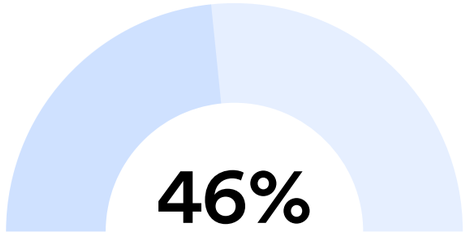
47% Faster or more reliable charging solutions

44% Better data and analytics tools for EV fleet management

38% Access to affordable charging infrastructure

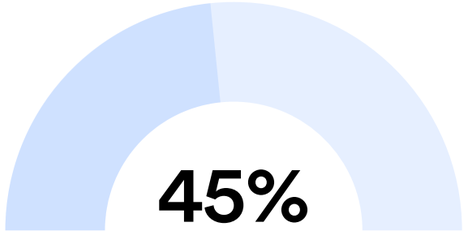
Looking ahead, organisations are directing investment toward strengthening roadmaps, expanding charging networks, and improving visibility of emissions and performance data. These choices reflect a shift from early experimentation to structured, long-term planning. Pilots proved what was possible; scaling requires clear strategies, robust infrastructure, and actionable insights to prove impact and drive value.

The biggest areas organisations are looking to scale up in next 2-3 years:



46%

Developing or refining an electrification strategy or roadmap



45%

Monitoring and reporting on emissions and performance data

In addition to the this, developing and/or expanding charging infrastructure - on-site or off-site - (40%) is also a common area expected to scale in the next 2-3 years.

Organisations are now at a crossroads. Intent and ambition are strong, but the real test lies in turning them into action. Those that move with purpose - and work with the right partners to scale effectively - will capture the full promise of electrification, shaping not only a more sustainable future, but a more competitive one.

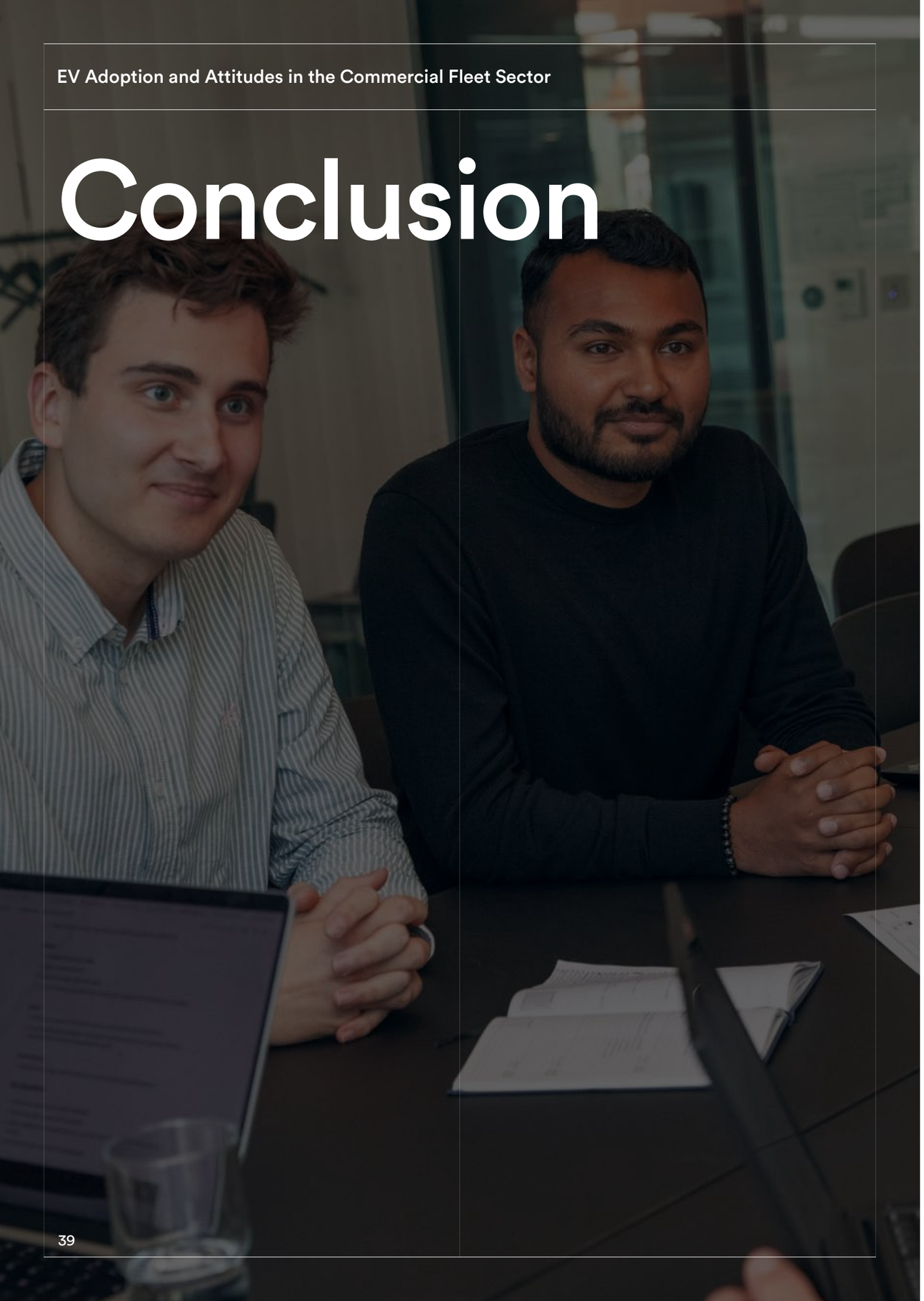
Public vs Private

In the next 2-3 years, private sector organisations are more likely to scale their transition by investing in vehicle procurement (45% vs. 24% public) and staff training (45% vs. 35%), aiming to secure ROI and maintain profitability.

Meanwhile, those from the public sector place greater emphasis on monitoring and reporting (47% vs. 44%), reflecting policy and compliance priorities. This highlights how the private sector is focused on driving tangible returns, while the public sector moves more cautiously to ensure alignment and accountability.

Scaling Blueprint

Key Activities	Pioneers	Navigators	Transformers
Create a Plan	What are the next stages of electrification? E.g. V2G, offgrid.	How far along the scaling plan is the company?	What is the initial scaling plan?
		Is the scaling going as expected?	
	What are the goals?	What are the goals?	What are the goals?
Finance and Funding		What funding is required and is available for the subsequent phases of scaling?	Is the funding in place for the first phase?
	Is the funding in place?	Are there any government grants available?	Are there any government grants available?
	How is it being funded?		
Stakeholder / Board Engagement	How can everyone be kept excited and engaged by the electrification process?		
	Who is key to the success of continued electrification?	Who is key to the success of the next phase of electrification?	Who is key for the first phase?
Goals	What are the goals of this phase?	What are the goals of this phase?	What are the goals of this phase?
	What metrics are required to prove that goals are being met?	What metrics are required to prove that goals are being met?	What metrics are required to prove that goals are being met?
Reliability	How reliable is the charging experience?	How reliable is the charging experience?	How reliable is the charging experience?
	How are suppliers performing against KPIs and can they scale?	How are suppliers performing against KPIs and can they scale?	
Government	Has any new legislation come out?		
	Any feedback through industry trade associations ?		
Technology	What new technology is available that wasn't previously available?		What technology should be installed today to ensure site is future proofed?
Training	How to train for the whole of the site?		How to train for one site?



Conclusion

Fleet electrification has reached a decisive moment. Pilots and early adoption have proven what's possible, but the real challenge now lies in scaling with confidence. Success will depend on embedding electrification into business strategy - making it not only a sustainability initiative, but a driver of efficiency, competitiveness, and long-term value.

To get there, organisations need more than ambition. The challenges - from infrastructure and cost pressures to data and skills gaps - show that scaling requires deliberate choices. It's no longer about experimenting in isolation, but about building the foundations and partnerships needed to scale with confidence.

Reflections from the Pioneers

Those who led the way in fleet electrification have shown what early action can achieve, but their experiences also offer valuable lessons for those following:

1. **Plan for scale from the start:**
   Success in electrification depends on aligning infrastructure, data, and financial planning early to support long-term performance.

2. **Continuously refine and evolve:**
   Treat electrification as an ongoing journey. Regularly review and adjust strategies to maximise efficiency and ROI.

3. **Embrace flexible investment models:**
   Innovative approaches such as Charging-as-a-Service can unlock scalability and create more predictable returns.

4. **Strengthen core capabilities:**
   Build deeper expertise in financial modelling, TCO analysis, and driver engagement to turn challenges into opportunities.

5. **Adopt an adaptive mindset:**
   As fleets mature, new complexities emerge. Staying agile ensures progress translates into sustained success.

EO Charging has been working with fleets for over a decade and have helped fleets navigate the issues outlined in this report. Electrification is an opportunity for significant business improvement and cost reduction, but it can only be realised with careful planning and operations. As a specialist in electrification, EO would recommend the following steps:

1. Define the strategy

Build a clear roadmap that links electrification directly to business outcomes and providing business continuity.

2. Strengthen the foundations

Put the right infrastructure, data, and financial tools in place, supported by partners who can embed operations and maintenance from the start.

3. Optimise operations through tactical talent and partnerships

Invest in the right people and partnerships to ensure there are no business continuity gaps caused by unreliable fleet electrification approaches.

Organisations now stand at a crossroads. Those that act with purpose - backed by a clear plan, strong foundations, and the right operational partners - will lead the charge. They will be the ones to unlock the full promise of electrification and secure a more sustainable, cost-effective future and EO are here to help the Pioneers, the Navigators and the Transformers.

Methodology:

We surveyed 315 senior decision-makers with responsibility for fleet strategy and electrification, split across the US (209) and the UK (106). All respondents held knowledge of their organisation's fleet electrification strategy.

Organisations were required to operate commercial fleets of at least 100 vehicles, which could include cars, vans, medium and heavy-duty trucks, buses and specialist vehicles. Respondents represented both the private and public sectors.

Defining the Fleet Electrification Personas

To provide further insight, we developed personas using a segmentation approach based on two survey variables:

1. **Electrification maturity** - the extent to which an organisation has already electrified its fleet.
2. **Formal net-zero transportation initiative** - the maturity of the organisation's commitment to net-zero transportation.

By cross-analysing responses to these two measures, we created three distinct personas that reflect different points along the electrification journey:

Pioneers

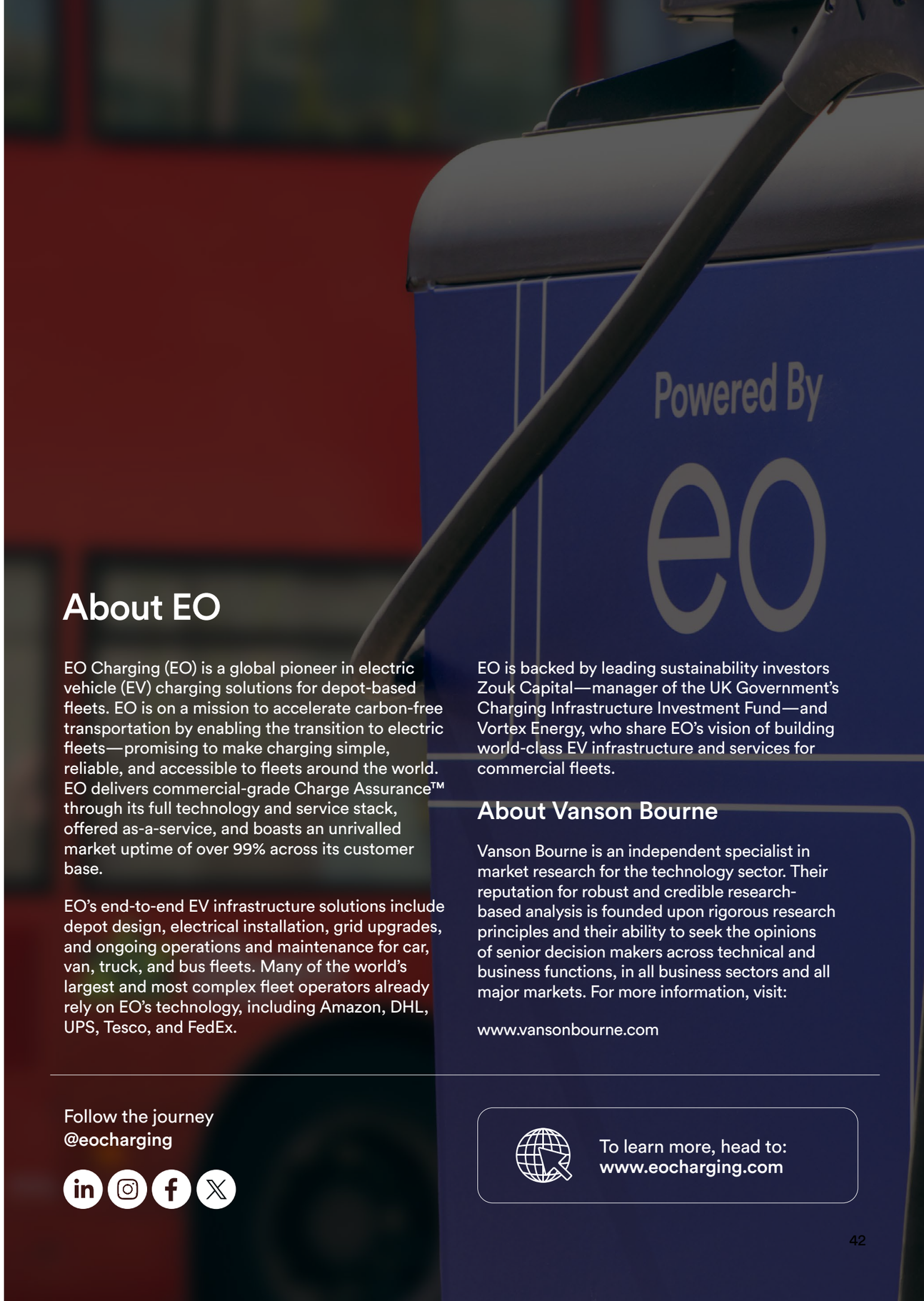
Organisations with a fully electrified fleet and a fully implemented initiative.

Navigators

Organisations actively transitioning with a clear electrification plan and a partially implemented initiative.

Transformers

Organisations piloting electric vehicles in select areas with a partially implemented initiative.



About EO

EO Charging (EO) is a global pioneer in electric vehicle (EV) charging solutions for depot-based fleets. EO is on a mission to accelerate carbon-free transportation by enabling the transition to electric fleets—promising to make charging simple, reliable, and accessible to fleets around the world. EO delivers commercial-grade Charge Assurance™ through its full technology and service stack, offered as-a-service, and boasts an unrivalled market uptime of over 99% across its customer base.

EO's end-to-end EV infrastructure solutions include depot design, electrical installation, grid upgrades, and ongoing operations and maintenance for car, van, truck, and bus fleets. Many of the world's largest and most complex fleet operators already rely on EO's technology, including Amazon, DHL, UPS, Tesco, and FedEx.

EO is backed by leading sustainability investors Zouk Capital—manager of the UK Government's Charging Infrastructure Investment Fund—and Vortex Energy, who share EO's vision of building world-class EV infrastructure and services for commercial fleets.

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Vanson Bourne is an independent specialist in market research for the technology sector. Their reputation for robust and credible research-based analysis is founded upon rigorous research principles and their ability to seek the opinions of senior decision makers across technical and business functions, in all business sectors and all major markets. For more information, visit:

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For press enquiries reach out to:
marketing@eocharging.com

Juuce Limited t/a EO Charging
E&W registration number 09314212
10 Eastbourne Terrace, London,
W2 6LG