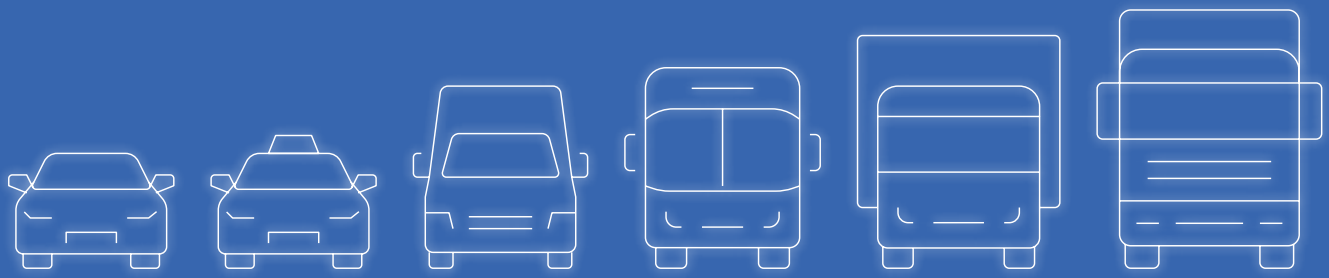
# Fleet Electrification MANIFESTO



Accelerating fleet decarbonisation
across the private and public sectors

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# COMMITMENT TO CERTAINTY

## delivering the future for decarbonisation

20.11.25 @ WARWICK CONFERENCES

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## Foreword

**This year saw the inaugural Fleet Electrification Forum take place at Warwick Conferences, which provided a wealth of information from a collection of leaders in the sector.**

The discussions led to vital insight and future actions for the decarbonisation of fleets - all of which is outlined in this document. Collaboration will be key, and as shown, across the public and private sector the transition is accelerating at pace.

Here are just a few of the top-tier organisations which participated: Climate Group, First Bus, National Grid, Royal Mail, DPD, Network Rail, BVRLA, the Welsh Government, Zemo Partnership, Tarmac, Kuehne+Nagel, and our emergency services.

But there is still much to do for these firms and across the sector. At present, cars are around 6-7% below the ZEV Mandate level for 2025, and vans are half what is required. For this year, 28% of new car sales and 16% of new van sales must be zero-emission - rising steeply toward a 2030 ban on new petrol/diesel car sales. The challenge for heavy good vehicles is even bigger, although the targets stretch to 2040.

The good news is that vehicle manufacturers and the wider automotive sector have responded with a whole range of new models, projects, and world-leading trials, such as the Zero Emission Heavy Goods Vehicles and Infrastructure programme. These issues are included in detail throughout the Manifesto.

There is also the need to collaborate with colleagues in the workplace who fleet managers rarely work alongside. As shown in this document, many companies are having to develop whole new ways of planning and strategising to fulfil their decarbonisation goals.

Fleet managers cite the availability of used EVs, the installation of charge points - and where to locate them - and employee engagement, as the lingering barriers to adoption. But with that comes opportunities, and the need for new ways of working. Again, the Manifesto outlines these strategies.

But as seen at the Fleet Electrification Forum, everyone is getting on and embracing the challenge. We must not take our foot off the accelerator. If anything, we need to put it to the floor. We need to learn from each other, develop plans together, and collaborate to a level that the transport and energy sectors have not seen in modern times.

We are on the journey - and T+E is delighted to help support the sectors in the transition.

**Alec Peachey,**
**Founder and Editorial Director,**
**Transport + Energy**

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## The five manifesto points

### 1. It's time for action, not trials

A consistent message across the Forum was "now is the time for action". Rather than focusing on small-scale pilots and trials of electric vehicles, delegates and speakers urged the fleet sector to "get moving". There was a degree of frustration that some companies were still in planning mode.

### 2. Learning through doing

Related to the above point, speakers sought to reassure that both the public and private sectors should not overplan schemes in detail or be concerned with futureproofing projects. A call to end strategising for electric vehicles and begin action was widespread, stating that much was simply learnt through doing rather than abstract modelling in the back office.

### 3. Bringing drivers on the journey

A critical note raised throughout was the need to bring drivers on the journey. With the majority of UK drivers never having driven an EV, let alone owned and run one in a daily context, the role of training, imparting knowledge, and upskilling was vital to the delivery of decarbonised fleets. Whether this was changing behaviours around charging, including domestically, or planning routes in different contexts and management to a traditional ICE vehicle, the driver must be at the centre of fleet decarbonisation for it to be successful.

### 4. Collaboration is key

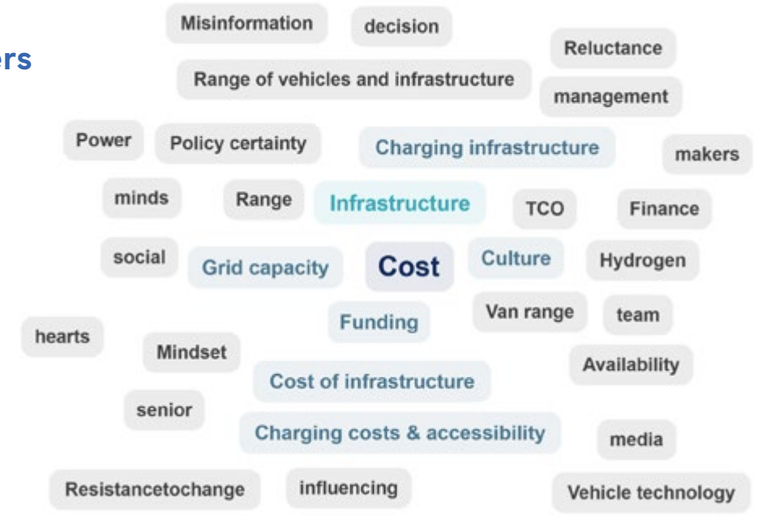
As shown in First Bus' landmark work in Glasgow on public electric charging at a commercial fleet depot, the need for radical collaboration and 'out of the box' thinking will be vital to the success of the transition. Equally, Zemo Partnership's work with the Welsh Government on scoping the placement of public charging, and Kuehne+Nagel's work with Renault Trucks on eHGVs reveals the potential for collaboration to deliver electrification. These were just a few of the various examples illustrated on cross-organisational working that are enabling the transition.

### 5. Not just funding required from the UK Government

Attendees at the forum cited that it wasn't just cash required from the government that was needed, it was legislative change. An example was changing the law to allow other companies to use energy at a depot and making it easier to collaborate on energy flexibility.

## Breaking down barriers

**The first question asked to attendees via Sli.do at the forum was what are the biggest barriers to accelerating the decarbonisation of fleets?**




Industry leaders said that cost, funding, culture, charging infrastructure and policy certainty were top issues for them. A number of examples were then offered of how firms were breaking down these issues. Dominic Phinn, the head of transport at Climate Group cited that fleets were "pioneering technology".

He referenced BT Openreach's plans, which demonstrated EV viability and "proof of concept", as well as logistics firm DPD and its investment of £300m with fully automated warehouses with EV charging.

However, Phinn said the transition was "complicated", with a need for cost parity, with the UK Government needing more intervention, especially on larger vehicles, to see progress across all vehicle segments.

In addition, charging infrastructure needed a "comprehensive nationwide plan which is delivered effectively", whether public or private, and a "real need" for private investment flows into new technology, especially into more heavy vehicles, including HGVs.

"Fleets need certainty in order to ensure the transition. It is about integrating new conversations which haven't existed before, such as questions around the grid and connectivity, and we have to continue that collaboration," he concluded.

The views were reflected by the managers of corporate fleets including National Grid, DPD, Dunelm and Royal Mail. These organisations explained there was a "long way to go" but through interim measures, including HVO fuel alongside electrification, fleet emissions could be reduced rapidly.

In addition, they revealed how it was possible to go at-pace. Lorna McAtear from National Grid said that its fleet would be 60% electric by next year and it was possible "to do a lot" in a short period of time with the right planning and management structures.

The managers also said that "really leaning into it" enabled organisational shift, but there was a warning about shareholder sentiment, especially against a challenging global financial environment: "the winds of change can blow in different directions", and there was concern about the cost of electricity in the UK being a barrier to break down in the next five to ten years.






## The local view

**Locality is key to the transition. A perspective from Wales on breaking down barriers was offered by Jonathan Murray, the acting managing director of Zemo Partnership, and Dafydd Munro, the head of transport decarbonisation policy at the Welsh Government.**

They noted how the "energy and industry sector has done a lot of the heavy lifting to date", but the decarbonisation of transport is the next step on the net-zero journey.

Decarbonising now will "keep you ahead of the competition with a real USP" and zero emission vehicles were "increasingly becoming the most cost-effective solution".

The project in Wales really "opened the eyes" of Murray, who said one of the key things was the reliance on used vehicles, and the importance of a fair transition, and the legacy fleet was "really important" in this goal.

He also highlighted the rural challenge, and how it would be "constrained" in mid-Wales for this reason. Low carbon fuels would therefore "play a significant role in the short term, while we wait for grid support", and there may be a role for hydrogen alongside HVO fuel.

Also highlighted within the collaboration was the need for access to finance, creating demand and energy planning: grid reinforcement, improved local area energy plans, engagement with DNOs and fleets, and capability funding with local authorities were key areas.

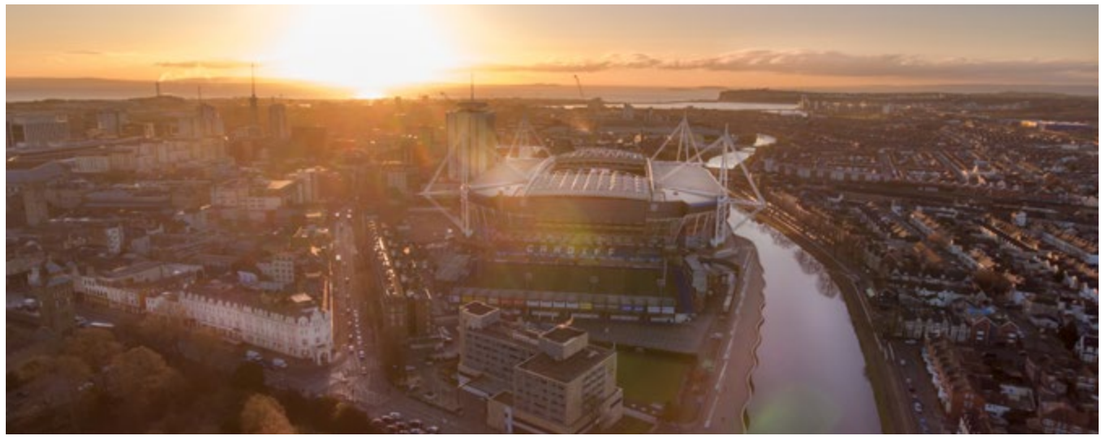
In addition, tackling misinformation and debunking myths, raising awareness and clarity on options, sharing best practice, and guidance would allow for a successful transition.

Looking at the progress and barriers facing other local public sector fleets, Chris Demetriou from Islington Council, Adrian Hampton of Wiltshire Council and James Brown from the Energy Saving Trust outlined a variety of issues for local authorities.

The contrast between Wiltshire's rural setting and Islington's urban landscape offered an important context in which to view the different national challenges on decarbonisation and electrification.

The high capital cost of projects was a key topic of discussion. Hampton developed a business case based on real-life cost data, demonstrating that installation expenses could be offset by long-term operational savings. Securing political support was also essential to move the project forward.

Range anxiety - an issue rurally - was not a concern in Islington, where electrification was a necessary step. The council was now exploring alternative energy sources and said it believes it's time to "rethink how we approach energy use".



## Radical collaboration

**The concept of sharing EV charging infrastructure was described as "not a pipe dream" but was "happening now" by First Bus' Faizan Ahmad, who outlined the radical work the firm had undertaken in Glasgow to enable public usage of its commercial charging depot.**

He outlined three practical models for collaboration:

1. **Inside the fence:** private access for fleets without their own depots
2. **Outside the fence:** public charge points just beyond depot boundaries
3. **Flex the fence:** hybrid models using clever property layouts and temporary barriers

This approach is already in action across sites, including First Bus's Glasgow depot, offering ultra-rapid charging at competitive rates (39p/kWh) and reducing the need for fleets to invest in standalone infrastructure. The key message was that shared infrastructure was a "win-win" for fleets, the public and the overall net-zero transition.

Ahmad highlighted how the company had worked with Centrica in providing charging facilities at its sites. This was important for the energy firm as its van fleet didn't have depot support, and the transition to electrification would require a wholesale change in refuelling for its drivers and fleets.

The general public "absolutely includes fleets', and he said the transition was "not an availability problem" - and we are "very unlikely" to have issues with crowding.

Duncan Webb, the fleet director at The AA explained that for the transformation of its roadside assistance vehicles it was important to recognise that the journey was "a business objective" - and that it was "not just a fleet manager's responsibility to deliver". He said that it was "an organisational challenge and you need the buy-in from everyone to achieve the progress you want".

This view was reflected by Lyndsey Hetherington from Drax Electric Vehicles, who also highlighted the importance of collaboration. She also said that there were some "inconsistencies" between public and fleet charging infrastructure across local authorities - and noted the opportunities for improving utilisation.

Ultimately, she said that forward planning and delivery on the ground would deliver the change, and now was the time for action.





## Heavy lifting

**The HGV transition**

The challenges around the van and HGV transition were highlighted in detail. Interestingly, 77% of attendees said that there should be a ZEV Mandate for truck manufacturers.

Kuehne+Nagel's Kate Broome said that the company, which had recently undertaken a trip to France with a Renault Trucks eHGV, wanted to open up megawatt charging to others and collaboration was "incredibly powerful".

She also said the fact the bus transition had happened quicker than the "more sceptical elements in the industry" was "very instructive". Broome said the logistics industry had to "crack the issue about nervousness about the transition", and introducing new ways of working was a "key element", and it was "incumbent on us to share expertise".

In addition, it was important to "wrap our arms around smaller operators" and make them comfortable about buying eHGVs. "Just providing funding is not enough for smaller operators," she said.

Neil Durno who works for Voltempo - leading partner of the ZEHID eFreight2030 consortium - said the trial of hiring an eHGV at the same cost point as a diesel vehicle, so smaller operators can use such vehicles, was a "game changer" for the sector to showcase the technology.

Instructively, Durno added: "A lot of people are doing a lot of academic reading and research, but not doing a lot of actual doing. Learn by doing."

Dr Isabella Panovic from Innovate UK said the ZEHID trials show that the vehicles are "viable" and by the time we get to the end of the programme in 2030, "we will see this happen holistically outside the project".

Mike Nugent, the chief revenue officer at Hitachi ZeroCarbon, focused on the financing challenges. He said that innovative financing, and delivering low cost and highly efficient funding to Total Cost of Ownership parity alongside ICE, was what he was "totally focused and driven on". He said that he would be "disappointed" if by 2030 we aren't "able for SMEs to be able to access the kind of capital that larger players can get hold of".

He added that businesses should realise that you can "do something smart with the technology". It was important to recognise that EVs offer a "very unique asset" in the battery, not just in first life, but in second life, which would allow the TCO model to be "more biased in a positive manner" in the future.

## The construction industry

**Ben Garner from Tarmac shared a powerful perspective on decarbonising fleets in the construction sector, and tackling emissions in one of the hardest-to-abate industries.**

Delivering a clarion call that "the future is here...now", he emphasised that all the technology needed for the heavy construction sector to electrify already exists - making it a prime candidate for rapid adoption.

The sector was "well-suited to electrification" and raw materials can be delivered by train then distributed locally by truck, illustrating the importance of multimodal operations to the transition. With 30 trains per day carrying an average of 1,500 tons each, there was a "significant opportunity to electrify".

In addition, Garner suggested that a shift toward articulated lorries could "kickstart the transition", supported by trial programmes that let operators test electric trucks in real-world conditions.

But the biggest barrier remains payload challenge: electric trucks currently carry around 20% less than their diesel counterparts, leading to higher costs and a need for more drivers.





## The light commercial vehicle view

**OVO, Network Rail, and the BVRLA explained the van opportunities and challenges. Catherine Bowen from the BVRLA highlighted the importance of policy and regulatory clarity, and how it was collaborating with industry to develop practical guidance and press for legislation which supported electric van uptake and infrastructure rollout.**

Sarah Armitage from Network Rail spoke about the practical challenges of running an electric fleet with on-call staff, where access to rapid charging and vehicle range becomes critical. She noted the operational benefits of EVs: idling in diesel vans to power heating or equipment have become unnecessary with electrification - cutting fuel use and emissions.

The organisations agreed that while progress is accelerating, with new models offering better range, reliability and features, the role of OEM innovation, charging access, and cross-sector collaboration will be crucial in keeping up momentum.

OVO's SJ Mitchell explained how the firm was just a "handful" of vehicles away from completing its electrification journey. Stating it hadn't been easy and was more like a "marathon than a sprint". But the journey was getting better due to technology and infrastructure improvements. Listening to drivers, addressing fears, and helping them understand concerns were "not unique to EVs" - but was critical to a successful transition. OVO also supported drivers in travelling smarter, from topping up at low-cost out-of-town chargers, to using intelligent route planning tools.

## The complexity of the emergency services transition

**An important element of the decarbonisation of fleets is essential vehicles associated with the emergency services.**

Leaders from West Yorkshire Police, NHS England, and London Fire Brigade shared how they're tackling the electrification of critical emergency service fleets - an enormous challenge shaped by high stakes, unpredictable demand, and complex infrastructure needs.

In terms of culture and operational challenges, emergency services face unique pressures with no such "typical day" allowing for planning - and vehicles needing to be ready from minimal activity to full deployment.

Once used, vehicles must return to base for cleaning before recharging, making turnaround times tight. The cultural shift is significant, as mistakes "can have serious consequences", it was noted.

Paul Leach, a former paramedic and now in charge of fleet management at the NHS, shared that his fleet responded to 761,000 incidents in May. Ongoing shifts in NHS structures complicate long-term planning, especially when preparing for mass power outages that could severely impact charging capacity.

The police and fire services noted that understanding the scale of infrastructure needed for fleets was important, and the challenge of accessing accurate electricity cost data, which is critical for informed decision-making.

Drax's Lyndsey Hetherington, who has worked on projects with emergency services, highlighted the importance of collaboration and co-location, including exploration of the potential for shared depots across emergency services.

Some ambulance trusts are beginning to co-locate charging infrastructure with other services, though structural differences between hospital and ambulance trusts make coordination complex. Hospital doctors are also calling for cleaner vehicles, noting that idling ambulances pollute the air around A&E units.

A key principle highlighted was ambulances must not be taken out of service solely to charge. Charging should only happen when a vehicle is already out of action for operational reasons.






## Conclusion

**The Manifesto clearly outlines the variety of challenges and opportunities that the fleet sector faces in the next five years.**

Although much good work has already been done, there was a feeling at the Forum and amongst leaders in the industry that it was time to put the foot down. The sector now needs to accelerate towards the goals which have been set both at a national and local governmental level, as well as within the private sector.

Now is no longer the time for trials and pilots. We have reached the point of action being converted and taking commitment to certainty on fleets becoming fully electrified by the end of the decade. The target is high, but as shown by the examples of the Manifesto, the will and ability to act is there.

Transport + Energy looks forward to helping the sector on its journey and supporting the public and private sectors in fulfilling their goals.

**Transport + Energy would also like to thank our sponsors, exhibitors and supporters of the Fleet Electrification Forum**

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