EXCERPT
(from a total of ca. 100 pages)

Fleet Charging Study 2026

(incl. Fleet Electrification Archetypes)

Fleet electrification from a business perspective

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Management Summary

- Alle Branchen arbeiten an der Elektrifizierung ihrer Flotten, große Unternehmen stärker als kleine. Hauptbarriere der Nicht-Elektrifizierer sind nicht mehr primär die Kosten, sondern andere Prioritäten im Unternehmen.
- Für die Elektrifizierer sind Kosteneinsparungen und gesetzliche Vorgaben die wichtigsten Motive. Man plant langfristig, investiert aber taktisch und stellt flexibel. Die Erfahrungen sind gemischt. Die Probleme sind angeführt von hohen Kosten und technischen Herausforderungen.
- Laden am Standort
  - Neben der Elektrifizierung der eigenen Flotte bieten viele Unternehmen Laden für Mitarbeiter, Kunden und Lieferanten.
  - Im Depot bestehen AC- und DC-gleichermaßen wichtig. Beide werden massiv ausgebaut, egal welche Fahrzeuge vorhanden sind. Große Unternehmen bauen stärker DC aus.
  - Entscheidungskriterien für die Lösung: Erweiterbarkeit, Features und Schnittstellen. Große Unternehmen bevorzugen Komplettanbieter.
  - Info- und Kaufkriterien hängen von der Unternehmensgröße und Branche ab. Die Mehrheit investiert auf eigenem Grund und bevorzugt den Direktkauf.
  - Zum operativen Betrieb teilt sich die Präferenz 50/50 auf in den Wunsch, die Steuerung in der eigenen Hand zu halten, und die Beauftragung von Dritten (inklusive bei den Großen). Wichtig ist die Integration in die eigenen Systeme.
  - Während 2024 eindeutig das HWB im Zentrum stand, gewinnt das LMS an Bedeutung. Schnittstellen zwischen beiden Systemen sind ein Muss.
- Laden unterwegs
  - Dienstleister und Fahrer teilen sich die Routen- und Ladeplanung. Bei großen Unternehmen greift die Dienstleister auch in die Ladeplanung ein.
  - Bei den Ladekarten liegen Akzeptanzschwerpunkte, Mineralöl-Unternehmen, CPOs (ohne die Mineralöl-Unternehmen gleichauf, OEM-Roaming-Angebote etwas dahinter. CPOs sagen zu, OEMs tatsächlich zurück.
  - Preis und Abdeckung gelten den Ausschlag für die Entscheidung, weiten Flotten noch nicht vollständig auf TCO fokussieren.
  - Ideen zur Preisgestaltung werden verhalten bewertet. Reservierungssysteme überwiegend abgelehnt.

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Management Summary

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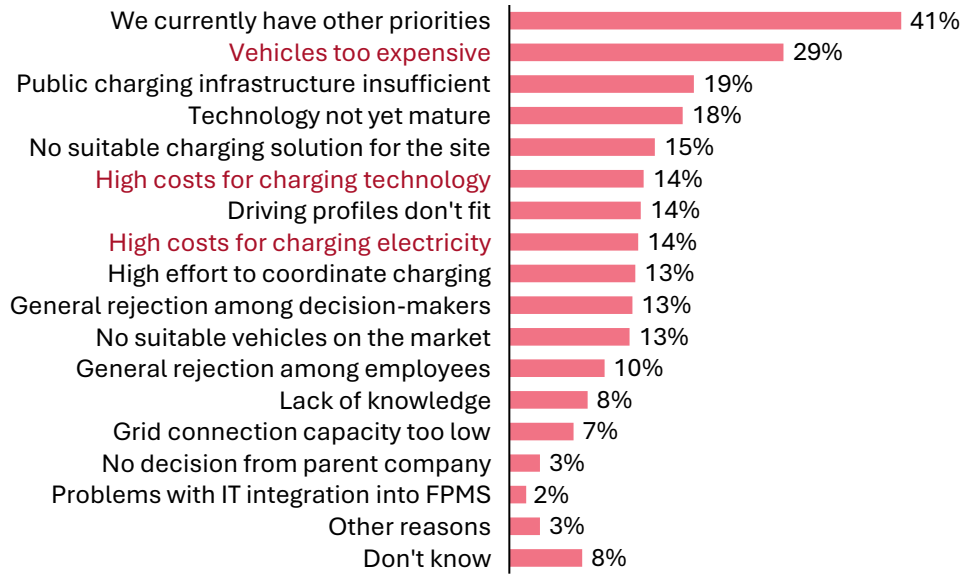
Non-electrifiers currently have other concerns

While the 2024 survey clearly showed high costs for vehicles, charging infrastructure, and energy as the top concern, cost issues are losing importance.

Instead, practical aspects around charging are becoming more important.

The main reason for not electrifying has little to do with electrification itself: companies simply have other priorities.

Barriers to electrifying company fleets:



"Why is electrification not currently an option for your company?"

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Objective

Starting point:

- Electrifying commercial fleets is a key lever for advancing corporate decarbonization.
- At the same time, it is significantly more complex than the private customer segment, since different vehicle types, sites, charging scenarios, and IT systems all need to come together.



Research questions:

- The study shows the status quo of commercial fleet electrification in Germany, target visions, and key hurdles.
- It identifies relevant charging use cases for cars, vans, and trucks, as well as the solutions companies are looking for at the depot, on the road, at customer sites, and at home.
- It describes the system and interface requirements placed on charging management, fleet management systems, energy management, and billing.
- It examines the criteria companies use to select providers of hardware, software, construction, and operation of charging solutions.

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Sample

Survey:

- Target group: Employees of companies who make decisions about the company fleet, alone or jointly with others (excluded: one-person companies)
- Survey method: Online survey (CAWI)
- Country: Germany
- Interview length: 15 min
- Fieldwork period: April 2026

Sample:

- Total sample: N = 1,213
  of which already engaging with electrification:
  - yes: N = 873 full survey (excerpt shown)
  - no: N = 340 excerpt shown
- Recruitment: multiple panels*
  of which:
  - Bilendi: N = 703
  - Dataforce: N = 388
  - moweb: N = 51
  - eTrucker platform: N = 71



* The Bilendi panel was deliberately not quota-controlled for companies already electrifying.

For Dataforce and moweb, a selection was made for e-mobility-affine companies.

The eTrucker platform is a social media platform focused on truck electrification.

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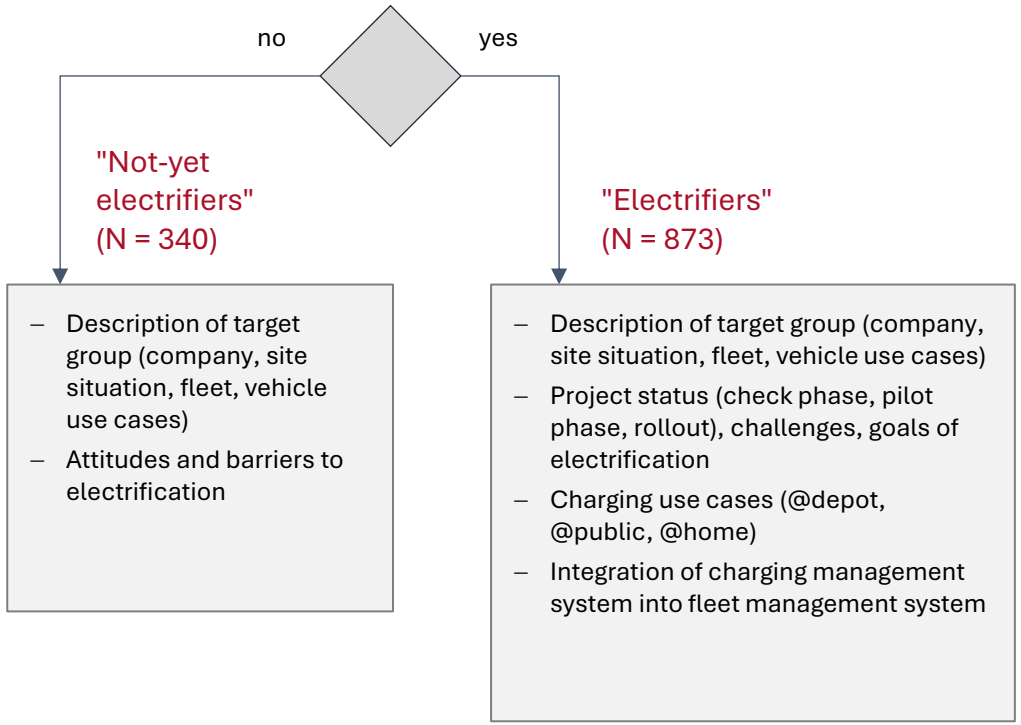
Study concept

Approach

- A central question of the study is whether the respondent's company is already engaging with fleet electrification, and where it stands on the path to electrification.
- Those whose companies are not yet working on electrification are screened out after questions on attitudes and barriers (N = 340).
- All others (N = 873) are surveyed in detail on the status quo, goals, partner involvement, and the solutions sought for the various use cases.

Central question:

Is your company already engaging with fleet electrification? (N = 1,213)



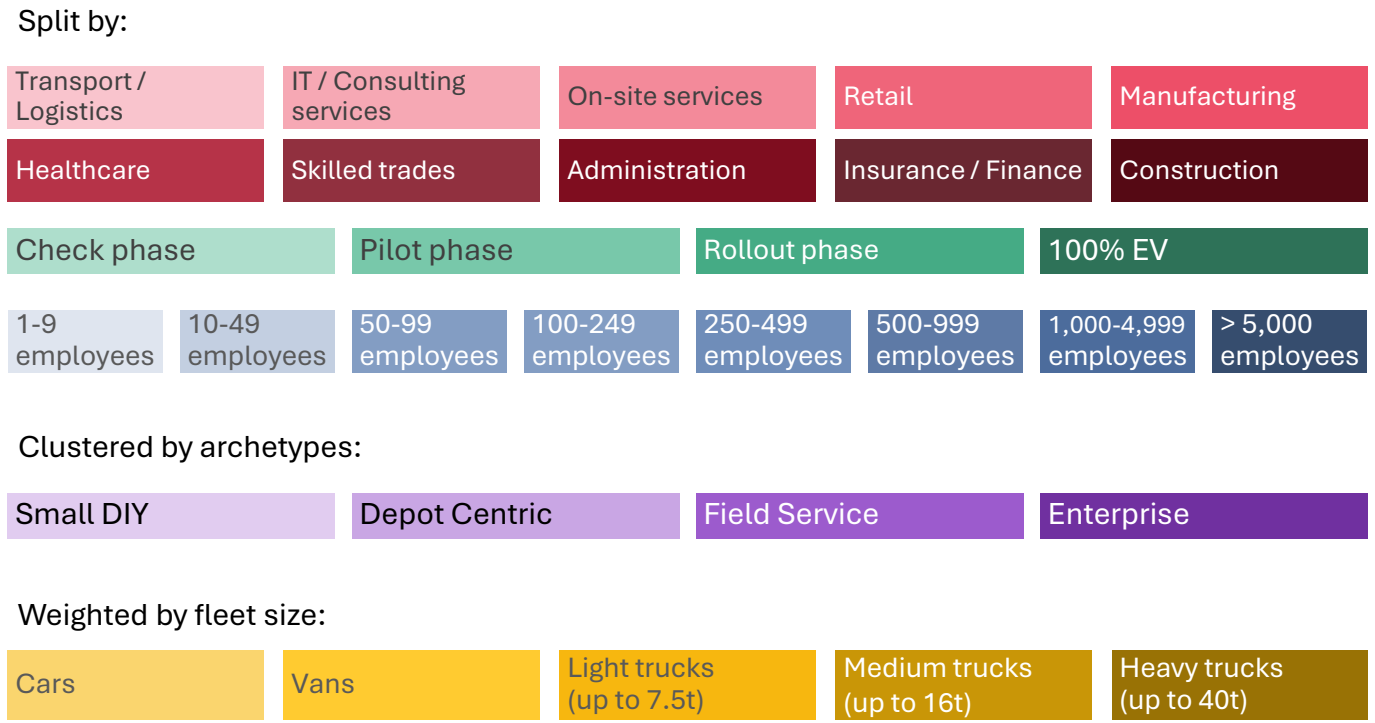
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Target group segmentation

The study segments by several characteristics to highlight trends and key differences. In addition, data is weighted by fleet type on a case-by-case basis. Differences are shown in the report where they are especially clear and relevant.

Target group segmentation:

- Where relevant, results were split by industry, implementation status, and company size.
- Alongside the direct sample splits, we used clustering to develop Fleet Electrification Archetypes, a kind of "company personas."
- Segmenting by vehicle type is not meaningful, since most fleets include several vehicle types. For relevant topics, results were therefore weighted by vehicle type.



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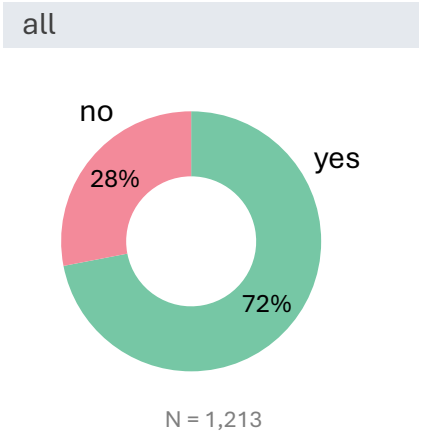
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Electrification status (by industry)

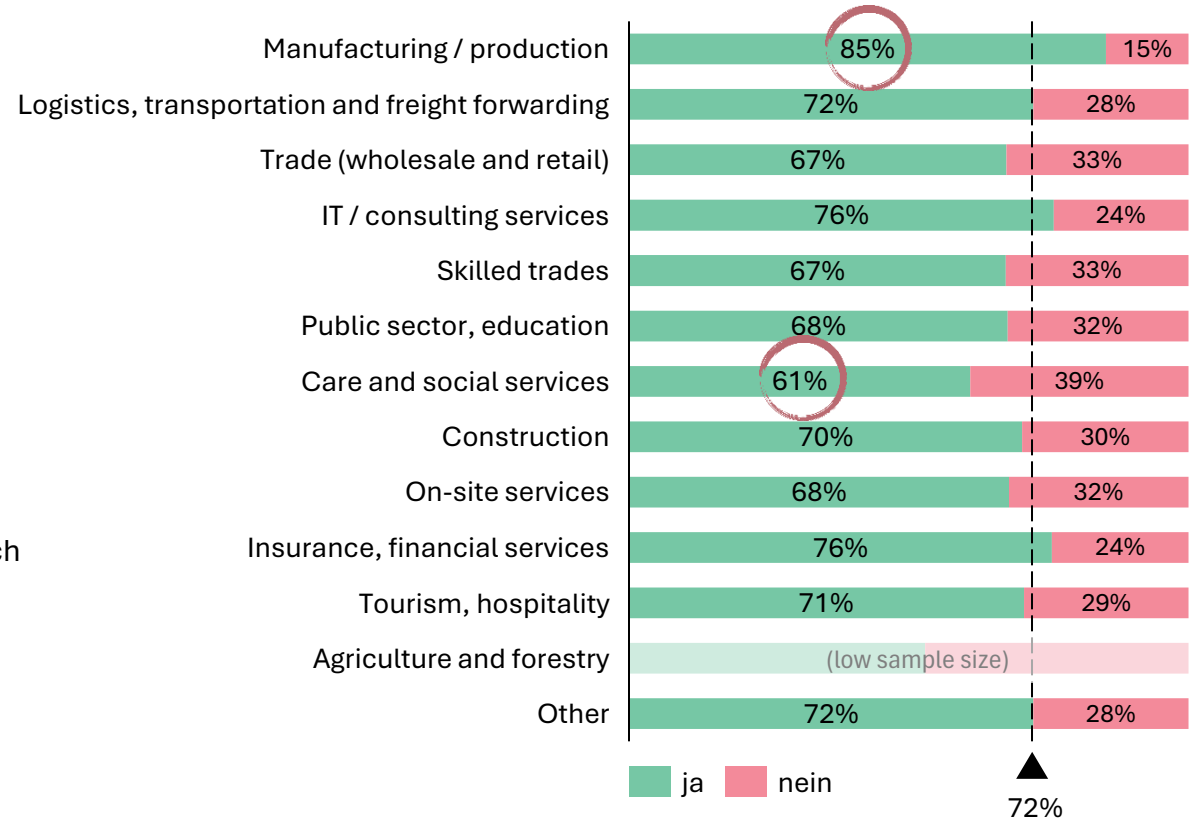
The share of companies electrifying their fleets is significantly higher among manufacturing companies and lower among care and social services companies than the average of surveyed companies.

"Is your company already looking into electrifying its own fleet?"



Note: Due to the mixed recruitment approach with partially pre-screened participants, the 72% share is not representative of all companies in Germany.

However, the figures do allow conclusions about differences between industries.



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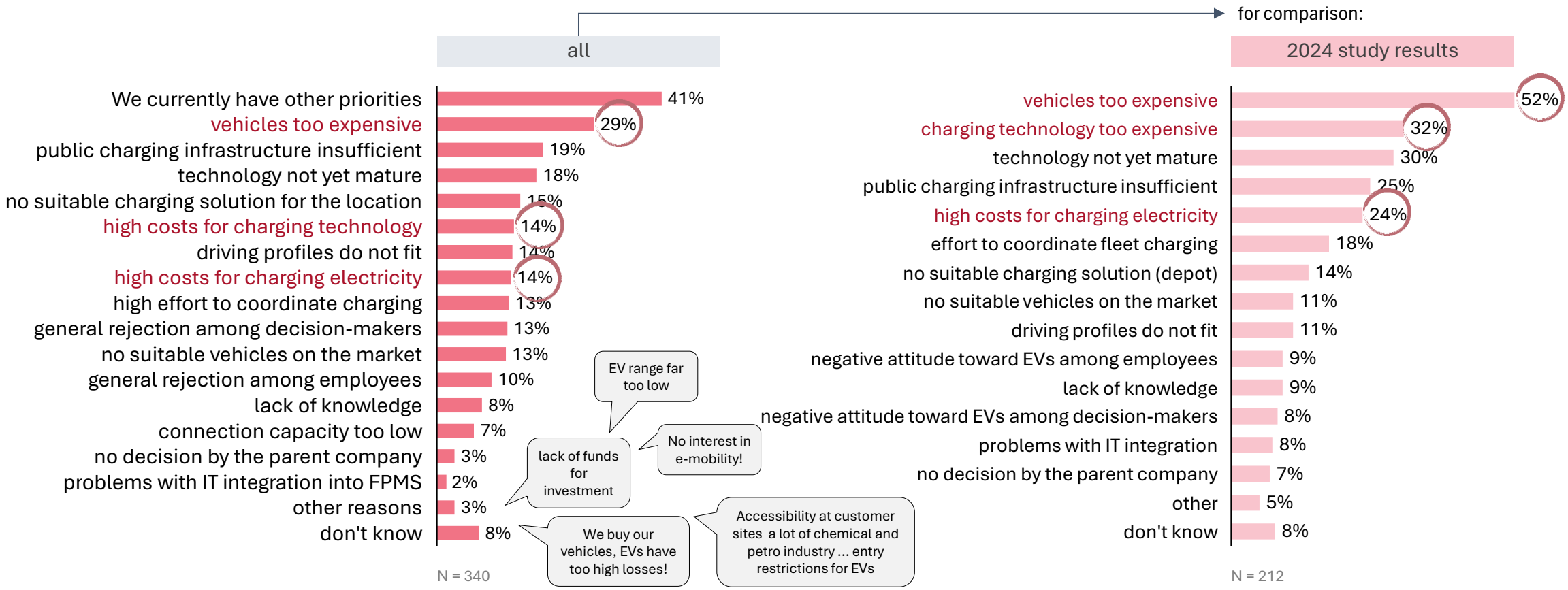
Non-electrifiers: reasons for rejection

(Electrification = no)

"Why is electrification not currently an option for your company?"

(Multiple answers possible)

Cost is still an important reason for rejecting electrification, but has declined significantly in frequency compared to 2024.



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Electrification status (2)

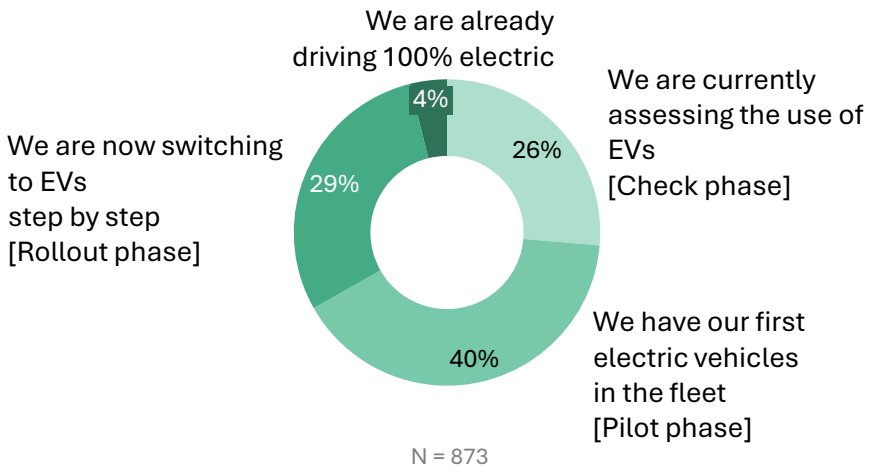
"The following questions are about the electrification of your fleet.

Where is your fleet on the path to electrification?

(By EVs we mean fully battery-electric vehicles, not plug-in or other hybrids.)"

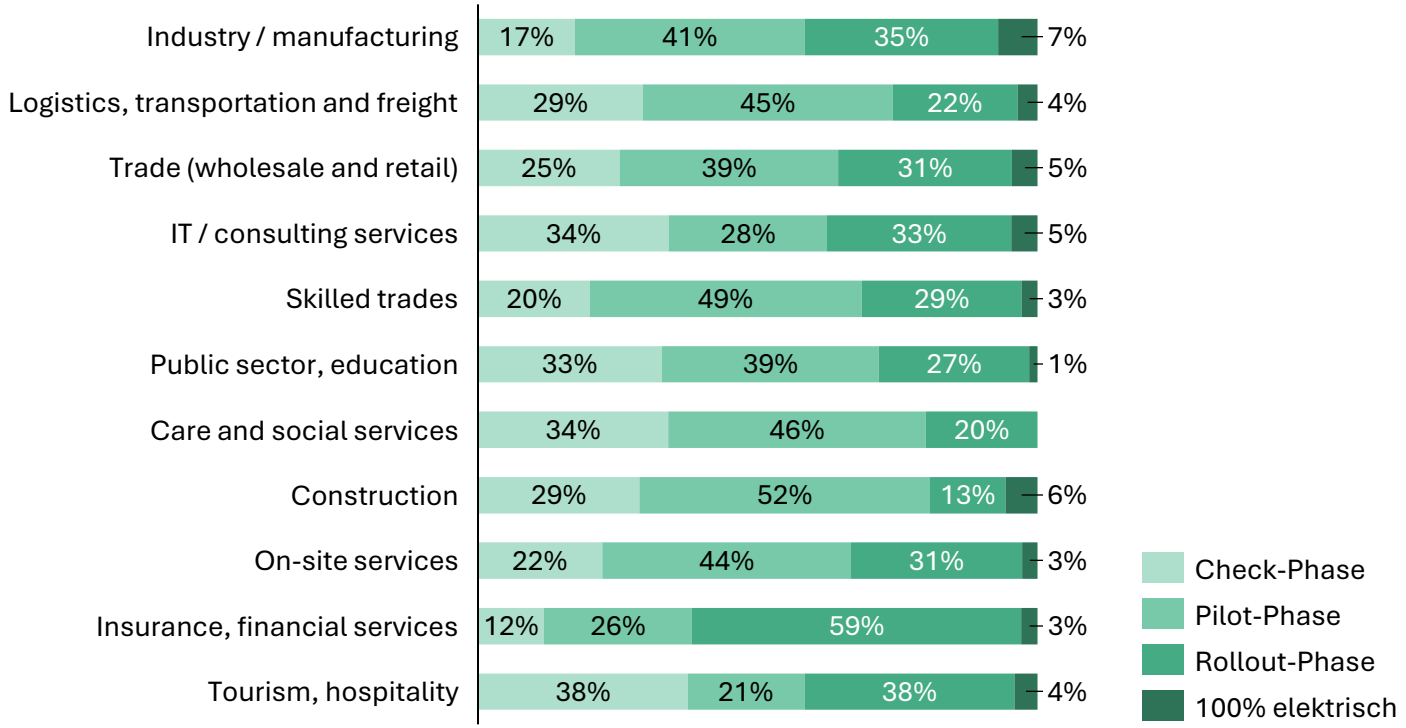
A large share of fleets are still in the check or pilot phase. Differences between industries are small and only significant in the finance industry.

Electrifiers



N = 873

Split by:



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Method: developing company archetypes

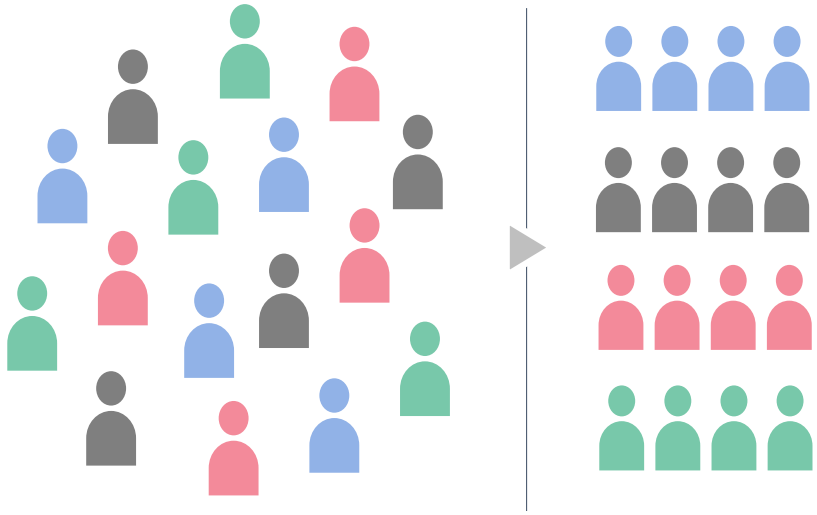
Two-step approach to forming company archetypes for electrification:
1) Clustering and 2) describing behavior and requirements for providers

Two dimensions as the starting point:

- Goal: clustering by characteristics that are easy and clear-cut to identify for the sales of charging solutions and offerings.
- Characteristics used for clustering: industry, number of employees, vehicle use case

Method:

- Cluster analysis (k-prototypes) for mixed data (numeric, categorical)
- Number of clusters chosen based on statistical fit and group balance
- Result: four stable archetypes of similar size
- Archetypes were then profiled by needs and requirements, forming the basis for product implications



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Archetypes at a glance

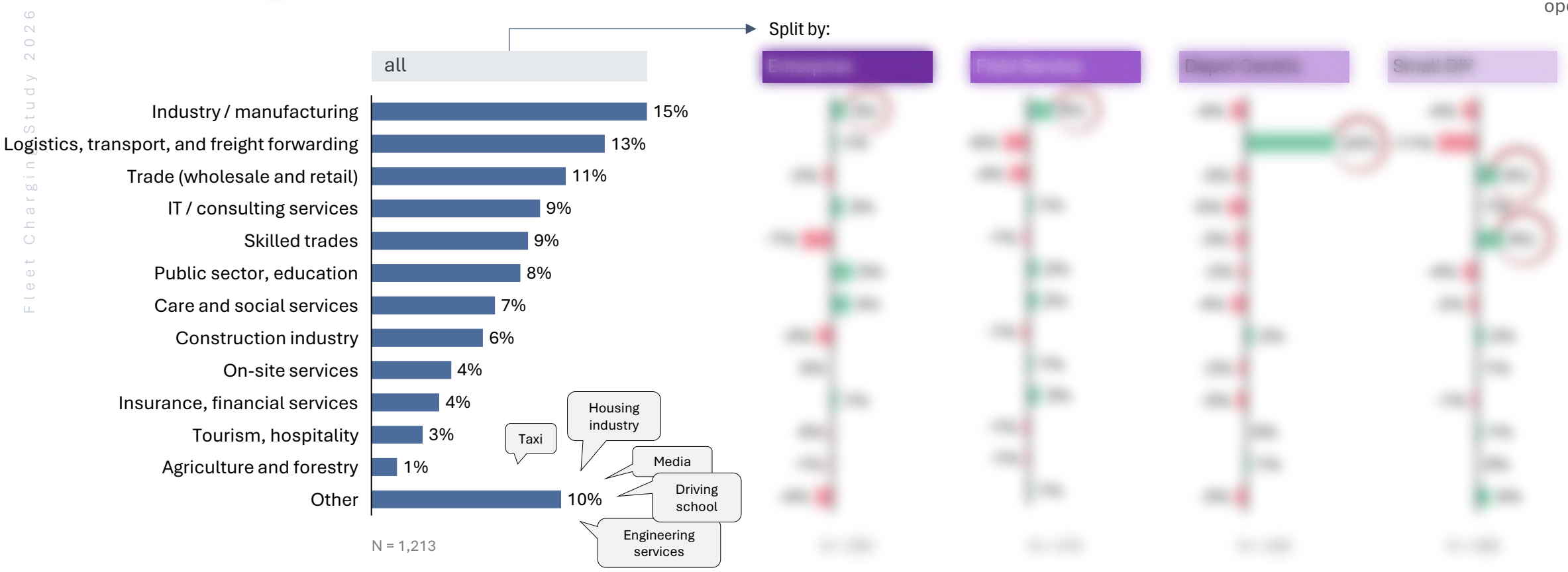


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Industry (by archetype)

[Enterprise- und Field Service-Flotten kommen häufiger aus dem produzierenden Gewerbe, Depot Centric-Flotten aus der Logistik, Small DIY-Flotten aus dem Einzelhandel und dem Handwerk.]

"In which sector does the company you work for operate?"



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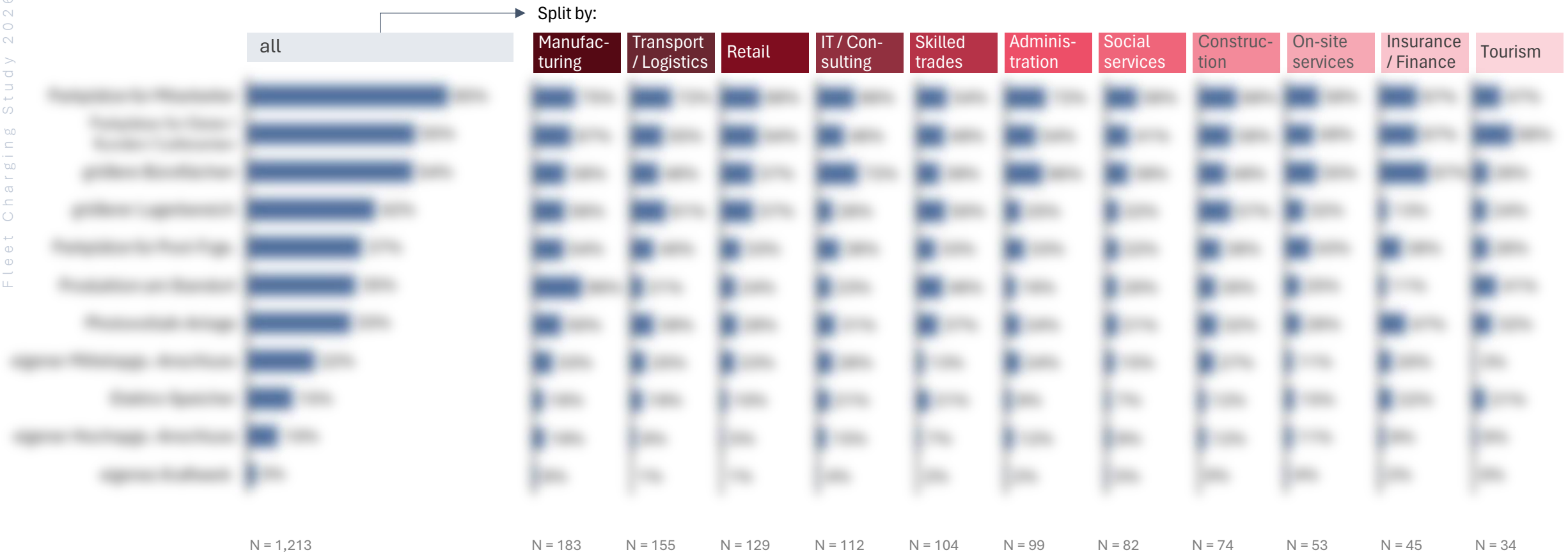
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On-site situation

Abhängig von der Branche verfügen die Standorte über unterschiedliche Ausstattungen. Das hat Auswirkungen auf die Anforderungen an die gewünschte Ladelösung.

"Could you tell us a little about your site?"

(Multiple answers possible)



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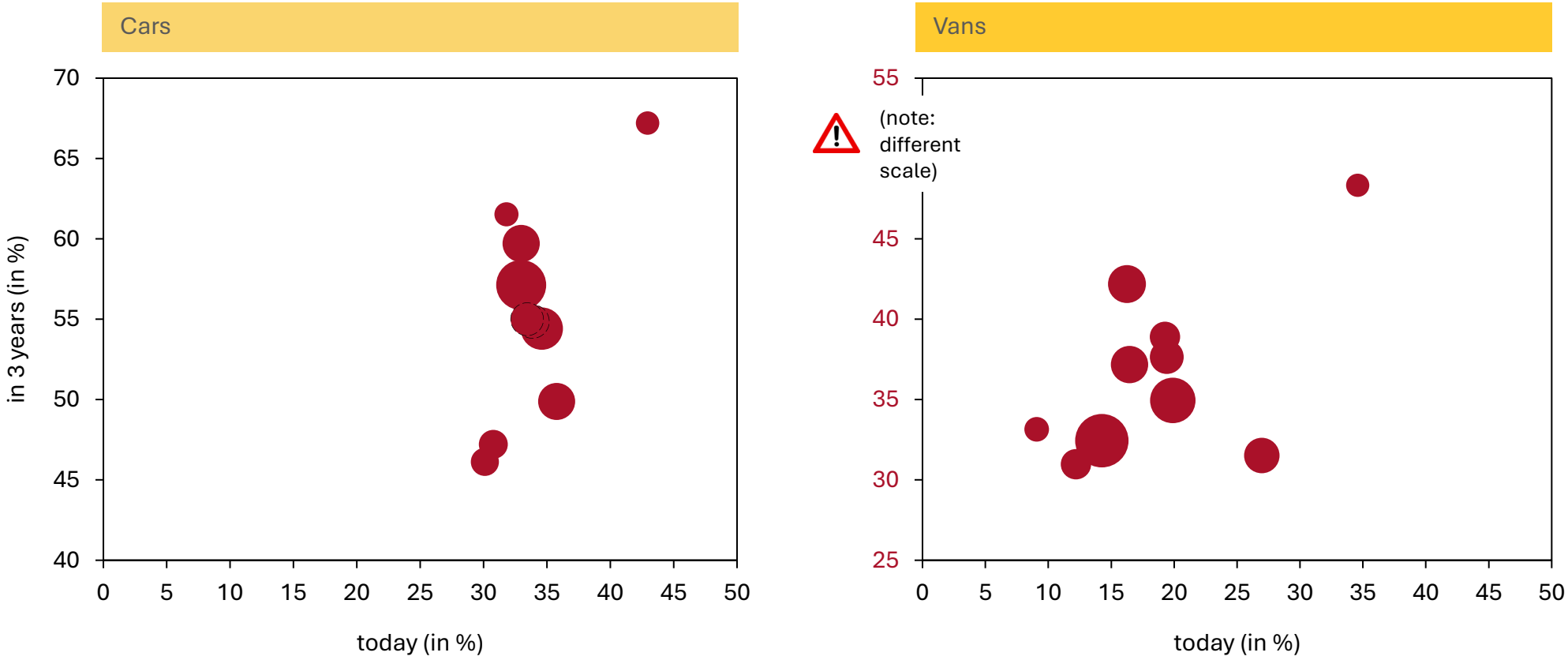
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Electrification – goals in 3 years

Der Elektrifizierungsgrad bei PKWs heute ist weitgehend unabhängig von der Branche. Die Ausbaupläne sind abhängig von der Branche sehr unterschiedlich. Status Quo und Ziele bei Transportern sind in allen Branchen deutlich zurückhaltender als bei PKWs.

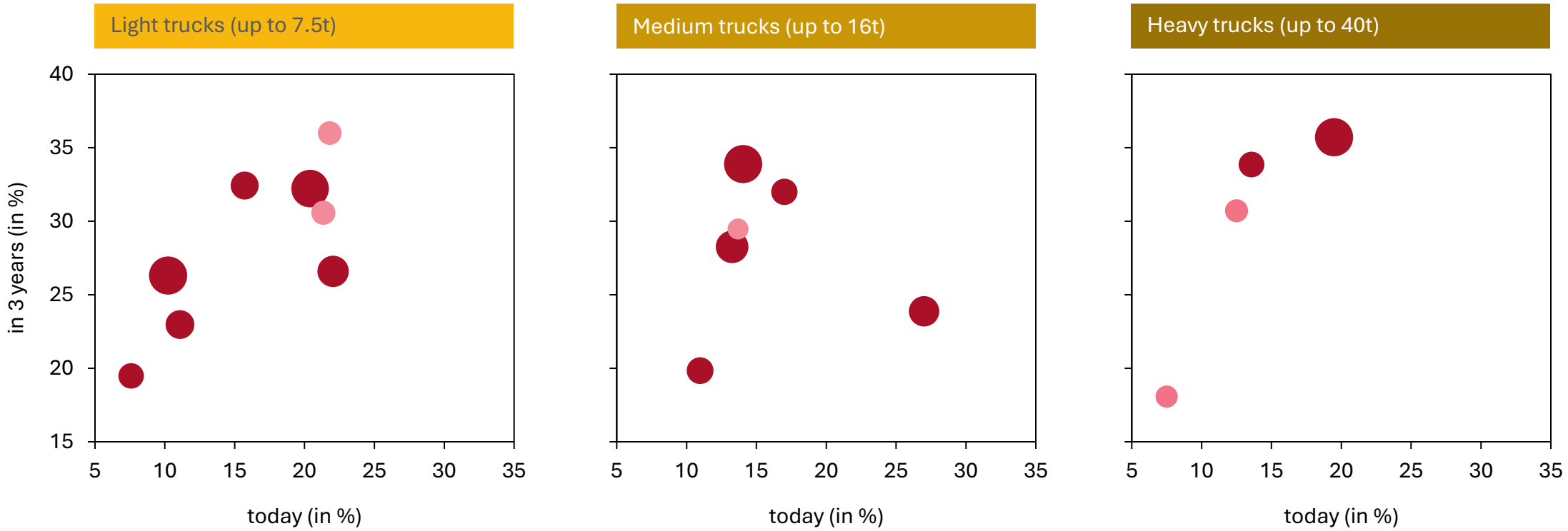
"What percentage of your fleet do you expect electric vehicles to account for in roughly three years' time?"



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Electrification – goals in 3 years

"What percentage of your fleet do you expect electric vehicles to account for in roughly three years' time?"

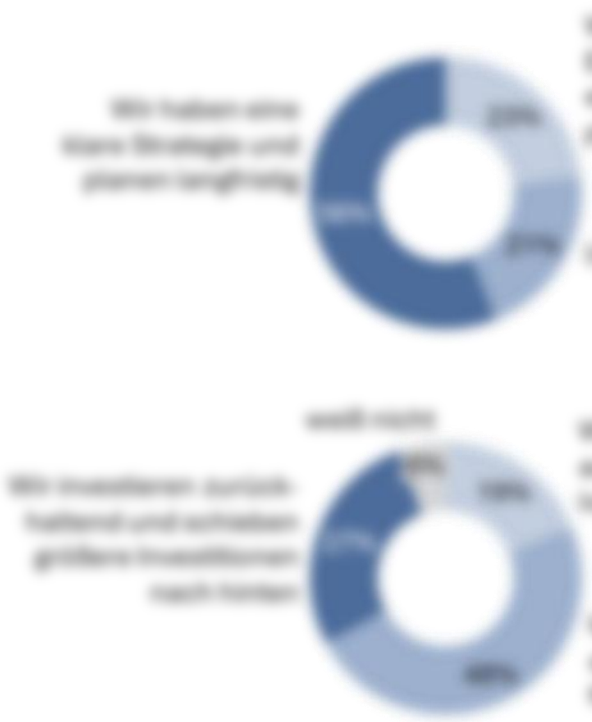


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Strategic direction and tactical approach

Jeweils rund die Hälfte der Unternehmen hat eine klare Strategie, aber investiert schrittweise, um flexibel zu bleiben. Zwischen den Teilzielgruppen gibt es nennenswerte Unterschiede.

"Generally speaking, does your company take a short-term or long-term view of electrification?"



Split by...

Rollout phase

- Unternehmen in der Pilot-Phase sind noch vorsichtig, sie fahren auf Sicht und verschieben größere Investitionen.
- Unternehmen im Rollout haben häufiger eine klare Strategie und investieren schrittweise.

Fleet type

- LKW-Flotten haben häufiger eine klare Strategie und investieren häufiger jetzt, auch wenn es noch teuer ist.

Industry

- (Es gibt keine signifikanten Unterschiede zwischen den Branchen.)

Company size

- Kleine Unternehmen sehen sich strategisch häufiger „dazwischen".
- Große Unternehmen haben deutlich häufiger eine klare Strategie und investieren jetzt, auch wenn es noch teuer ist.

"Charging technology is expensive and evolving quickly. Generally speaking, how do you deal with that?"

N = 873

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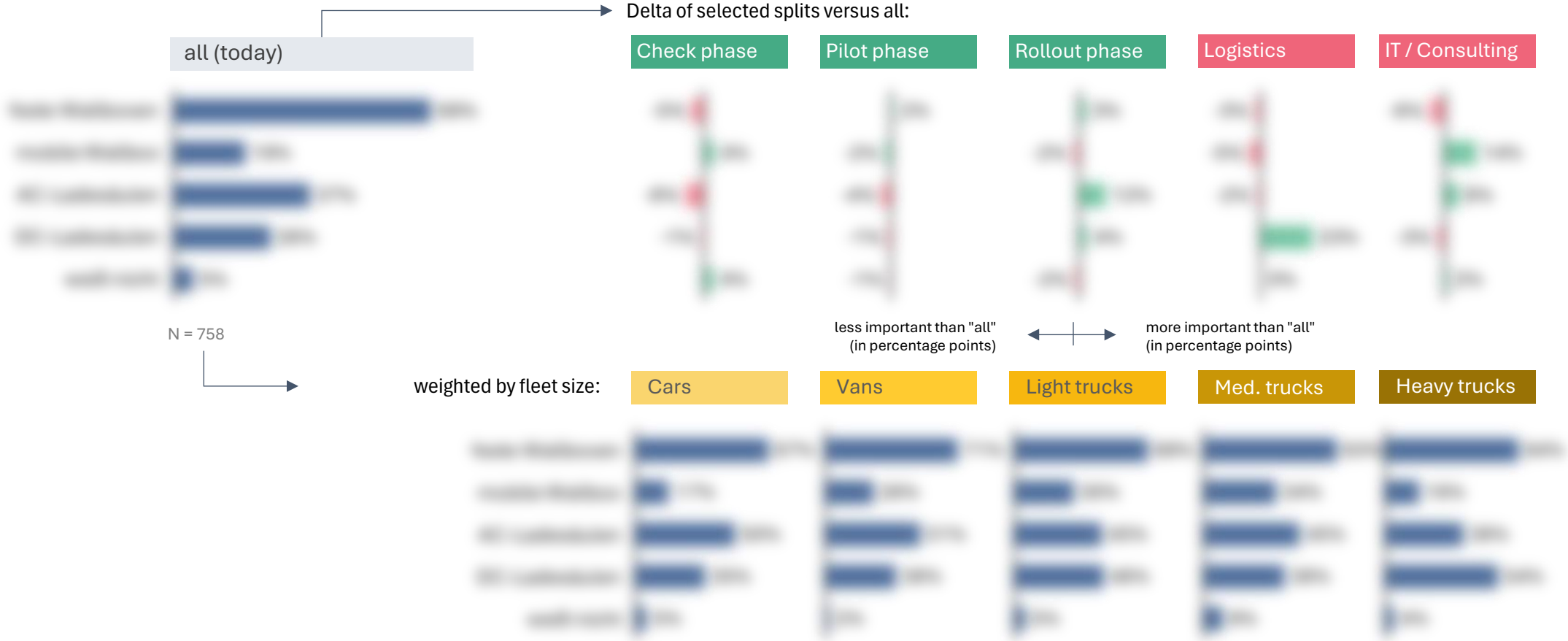
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General charging solution

"What solutions do you have or are you looking for regarding on-site charging?"

(Multiple answers possible)

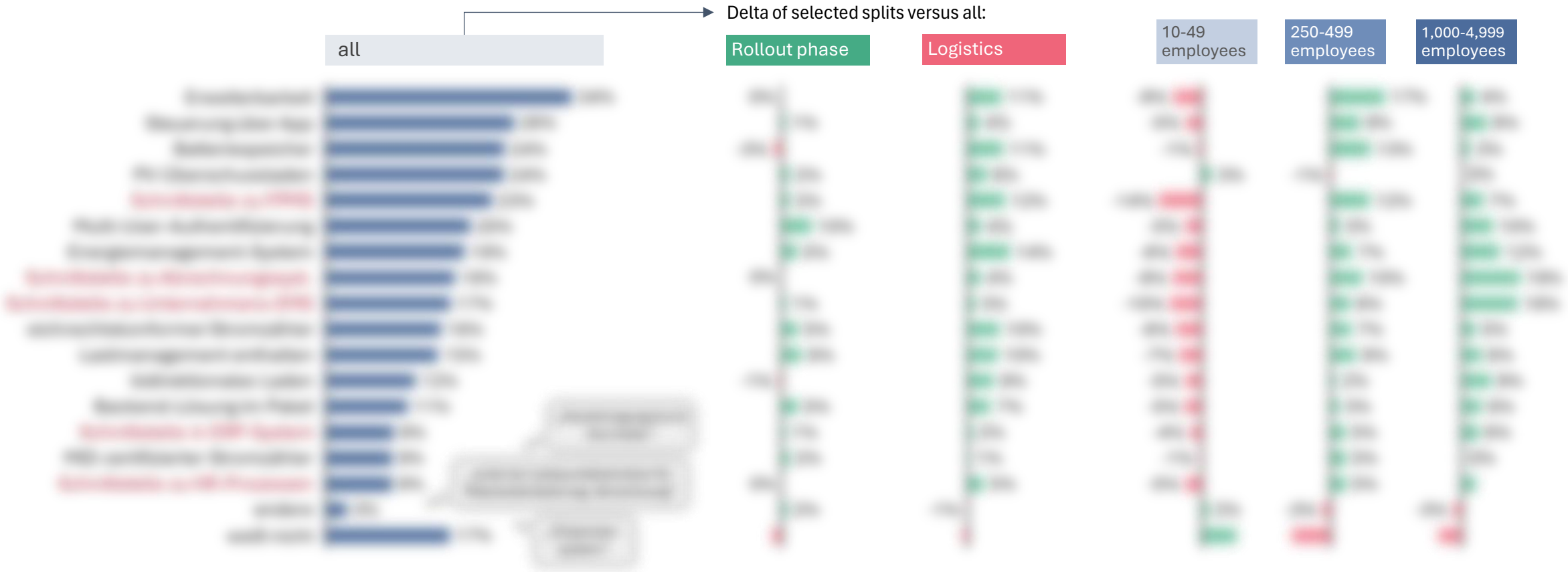


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Most important factors in choosing the solution

"What are or were the most important factors in choosing the specific charging solution?"

(Multiple answers possible)



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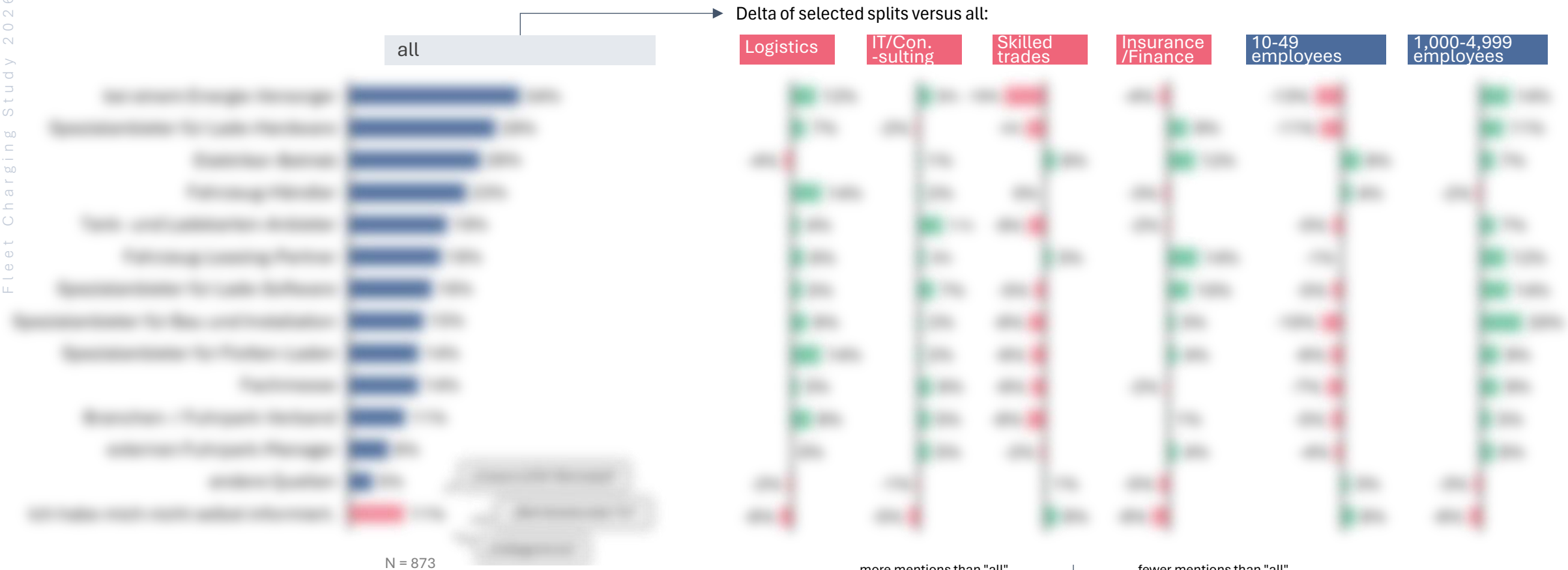
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Information sources

"When your company started engaging with e-mobility: where did you find out about specific charging solutions for your company?"

(Multiple answers possible)



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Charging cards used, criteria

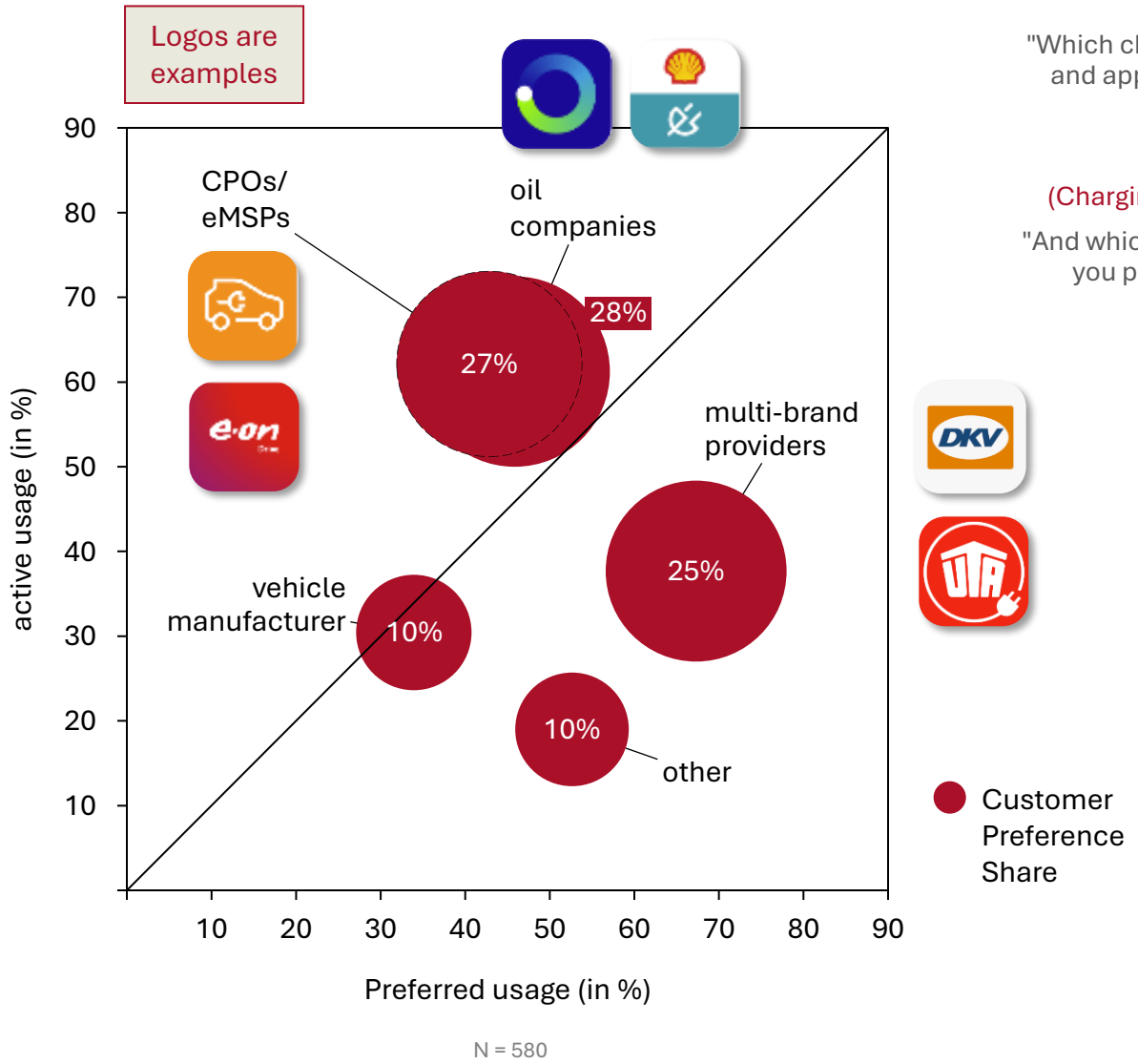
Customer Preference Matrix

The three groups – oil companies, CPOs, and acceptance networks – dominate the market in roughly equal shares. Their positioning differs considerably, though: the latter are used less often, but when used, are more often preferred.

How to read this:

38% use a charging service from an acceptance network, and 68% of those prefer it.

The customer preference share is therefore 25% (38% x 68%).



"Which charging cards and apps do you use exactly?"

vs.

(Charging card used)

"And which of these do you prefer to use?"

N = 580

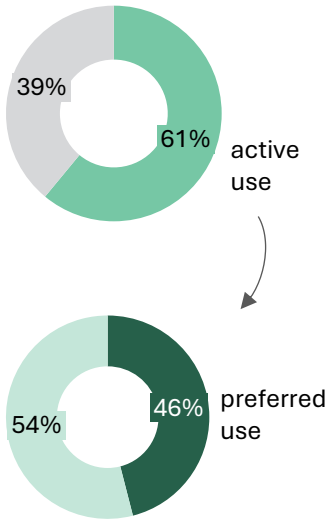
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Charging card provider profile: oil companies



Ladekarten von Mineralölgesellschaften überzeugen vor allem durch die Möglichkeit Sterneberechtigungsgruppen zu hinterlegen. Im Bezug auf die Zahlungskonditionen und den Preis gibt es aber noch Ausbaubedarf. Genutzt werden sie aber von vielen großen Unternehmen.

Market share:



N = 212

Company sizes (employees):



N = 212

Criteria for choosing the charging service provider:



N = 200 - 202

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