

Charge For All

The right approach to EV charging land acquisition, ensuring the transition reaches every community, not just the ones that are easy to serve

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EXECUTIVE SUMMARY

The UK's EV charging infrastructure is growing rapidly, but it is growing in the wrong places. Public chargers are concentrated in London and the South East, in affluent urban postcodes, and alongside major retail and motorway corridors. Meanwhile, 9.3 million households that rely on street parking lack a public charger within a five-minute walk. Only 15% of public charge points in England are located in rural areas. And the communities most likely to benefit from EVs, those with high transport costs, older vehicles and limited access to off-street parking, are the least likely to have access to the infrastructure that makes EV ownership practical.

This paper raises the question that site acquisition strategies currently deployed by charge point operators (CPOs) may be replicating the mistakes of the early broadband rollout, prioritising commercially attractive locations and leaving the hardest-to-serve communities to a later phase that, without structural intervention, may never fully arrive. Drawing on the lessons of the broadband universal service obligation, the Rural Gigabit Connectivity programme, and the Shared Rural Network, it sets out a framework for an equitable, nationally coordinated approach to EV charging land acquisition, one that treats charging infrastructure as essential public utility, not purely a commercial asset class.

120,388UK public EV chargers
(Zapmap, Apr 2026)**84%**Public chargers in urban
environments**9.3M**Households without a
charger within 5-min walk**68,000+**Potential rural/semi-rural
sites; less than 1% active

1. The Inequality in Plain Sight

The aggregate statistics on UK EV charging tell a story of impressive progress. According to Zapmap, the official data provider to the Department for Transport, there are now 120,388 public EV chargers across the UK, sited on 93,394 devices at 46,333 locations, with 1,308 net new chargers added in April 2026 alone. Of those, 28,089 are rapid or ultra-rapid, spread across 1,004 dedicated charging hubs. These are genuine achievements. But aggregate statistics mask a distribution problem that, if unaddressed, will determine whether the electric vehicle transition is a shared national achievement or a privilege for those who happen to live in the right postcode.

The geography of access

Zapmap data confirms the regional concentration in stark terms: Greater London alone accounts for 31,094 of the UK's 120,388 public chargers, representing 26% of the entire national network, and the South East adds a further 15,555. Together, London and the South East hold nearly 39% of all public chargers, a figure that closely mirrors the NAO's earlier finding that 43% of all UK chargers are concentrated in those two regions. By contrast, the North East has just 907 rapid and ultra-rapid chargers, and Northern Ireland just 355. Scotland, Wales, and the North of England are structurally underserved relative to both population and EV uptake. Somerset, Westmorland and Furness, Herefordshire, the Isle of Wight, and numerous other rural and coastal authorities are among the worst-ranked areas in the country; places where EV ownership rates remain as low as 2%, not because residents are uninterested in lower running costs, but because the absence of charging infrastructure makes the switch genuinely impractical.

The five-minute test

Analysis by Field Dynamics found that approximately three-quarters of households relying on street parking do not have a public charger within a five-minute walk. In North-East Derbyshire and Redditch, fewer than 4% of on-street households have adequate coverage. In Westminster and Kensington and Chelsea, coverage approaches 100%. This is not a market outcome. It is a market failure.

The rural picture is starker still. Only 15% of public charge points in England are in rural areas: approximately one every ten miles, compared to one every 0.75 miles in London. The fastest-growing segment of the network makes this worse, not better: ultra-rapid chargers (150kW+) grew at 40% year-on-year in 2025, adding 3,425 units, almost exclusively in high-utilisation commercial locations. Of the 68,000 potential sites identified for charge-point installation across Great Britain, fewer than 1% are currently operational. And 79% of those untapped sites are in rural or semi-rural areas, precisely the locations where the commercial case is weakest and where the need is, in many respects, greatest. It is also worth noting that over one million charge points are installed at homes and workplaces, underscoring just how much the public network matters for the estimated 9.3 million households that cannot charge at home.

Why this matters beyond fairness

The equity argument is compelling in its own right. But there are also hard commercial and policy reasons why the current distribution pattern is unsustainable. First, the government's 8 million EV target by 2030 cannot be achieved if large segments of the population are effectively locked out of practical EV ownership. Second, EV adoption in rural areas, where average annual mileage is higher, running cost savings are larger and public transport alternatives are fewer, represents a disproportionate share of the potential emissions reduction from road transport. Third, the EV transition's political legitimacy depends on it being seen as equitable. A technology that delivers its benefits exclusively to urban, affluent, and southern communities will generate the kind of backlash that has historically derailed infrastructure programmes.

2. How We Got Here: The Commercial Logic Trap

The current distribution of EV charging infrastructure is not the result of malice or indifference. It is the predictable outcome of leaving infrastructure deployment entirely to private capital following commercial return. CPOs and site acquirers, operating rationally within the incentive structures available to them, have prioritised locations that offer the highest utilisation rates, the simplest grid connections, and the greatest certainty of return. In practice, this means motorway service areas, major retail parks, supermarket car parks, and affluent urban centres.

The rational operator problem

A charge point operator assessing two potential sites faces an asymmetric calculation. Site A is a motorway service area on the M6: high footfall, existing grid infrastructure, a national landowner with a professional property team, and a clear commercial framework. Site B is a village car park in rural Cumbria: low average daily traffic, costly grid connection requiring a new substation, a parish council landlord with no prior experience of leasehold infrastructure agreements, and uncertain utilisation in the near term.

The commercial case for Site A is straightforward. The case for Site B requires either subsidy, a longer investment horizon, or a non-commercial mandate. Without one of those three things, Site B does not get built. And this dynamic, replicated across thousands of micro-decisions by dozens of CPOs over five years, has produced the distribution we see today.

"The market will eventually reach rural communities; but 'eventually' is not an energy policy. The broadband rollout taught us that without structural intervention, the commercial case for hard-to-reach communities never quite materialises. We are repeating that lesson in real time."

The land acquisition bottleneck

Even where CPOs are willing to invest in less commercially obvious locations, the land acquisition process presents a structural barrier. The professional landlord community, including institutional property companies, large retailers and logistics operators, understands the EV charging leasehold model and can engage with it efficiently. Parish councils, community organisations, NHS trusts, faith groups, rural estate owners, and small local authorities frequently do not. The result is a skills and

capacity gap that slows deals in underserved areas to a fraction of the pace achievable in prime urban and retail locations.

Site acquisition in rural or community settings also faces challenges that rarely arise in commercial contexts: unclear land ownership, limited grid capacity at low-voltage distribution level, planning constraints in Areas of Outstanding Natural Beauty or Conservation Areas, and the absence of standard commercial terms. These are solvable problems; solving them requires a different approach to site development than the one optimised for prime retail locations.

3. The Broadband Parallel: Lessons from a Completed Journey

The most instructive precedent for the EV charging equity challenge is the UK's broadband rollout. Not because the technologies are identical, but because the structural problem, namely a commercially attractive market delivering uneven geographic outcomes with rural and hard-to-reach communities left behind, and the eventual policy response are directly applicable.

Infrastructure type	Fixed-line telecoms	EV charge points
Market phase in analogy	Post-privatisation, pre-USO	Post-ZEV mandate, pre-equity mandate
Private sector bias	Urban/suburban, profitable exchanges	Urban/retail, high-utilisation sites
Left-behind areas	Rural, remote, lower-density	Rural, deprived urban, on-street
Policy mechanism	USO + Rural Gigabit Connectivity fund	LEVI + Rural Connectivity Fund (nascent)
Land/access challenge	Private wayleaves, last-mile cost	Grid connection cost, landowner capacity
Community solution	Community Fibre Partnerships	Community EV hubs (emerging)

Source: DCMS, Ofcom, DfT, author analysis

What the broadband rollout taught us

The UK's experience with broadband connectivity offers four lessons that are directly applicable to EV charging land acquisition strategy.

Lesson 1: The market will serve most people, but not everyone

BT's commercial fibre rollout reached approximately 90% of the UK relatively efficiently. The last 10%, including rural communities, remote premises and areas with high connection costs, required direct public intervention through the Broadband Delivery UK programme, the Rural Gigabit Connectivity fund, and eventually the Universal Service Obligation. The same pattern is emerging in EV charging: the commercially attractive 70–80% of locations will be served adequately by the private market. The

remaining 20 to 30% will not; they are disproportionately the communities where the transition matters most.

Lesson 2: 'Outside-in' planning must be built in from the start

The most effective phases of the broadband rollout adopted an 'outside-in' approach, deliberately starting with the hardest-to-reach communities and building inward, ensuring that commercial operators could not simply cherry-pick the easy wins and leave. When this discipline was abandoned in later phases, the PAC and EFRA committees found the government was 'unable to demonstrate it was still following its Outside-In approach', resulting in a perpetuation of digital inequality. EV charging policy is currently running 'inside-out': rewarding commercial locations first and deferring the hard cases. This will produce the same result.

Lesson 3: Community intermediaries are essential

The Community Fibre Partnerships model, through which local organisations could apply for match-funded vouchers to bring gigabit connectivity to their area, proved to be one of the most effective mechanisms for reaching communities that commercial operators would not serve. It worked because it placed commissioning power in the hands of people with local knowledge, relationships, and a genuine stake in the outcome. An equivalent model for EV charging, specifically community charging hubs funded through public subsidy, local authority procurement and parish or community group involvement, is beginning to emerge, but at nowhere near the required scale or pace.

Lesson 4: Voucher and subsidy schemes work, but need demand stimulation

The Gigabit Broadband Voucher Scheme demonstrated that demand-side subsidies can accelerate uptake in underserved areas, but only when combined with supply-side investment in the physical infrastructure. The EV charging equivalent, the Rural EV Charging Fund and the LEVI scheme, is an important start, but the quantum of funding (£7 million and £2.2 million respectively) is orders of magnitude below what the broadband rollout required for equivalent geographic coverage. Scaling these programmes to match the ambition of the EV transition is a policy priority.

4. A Framework for Equitable Land Acquisition

The solution to the EV charging equity problem is not to override the market; it is to complement it with a structured, publicly coordinated land acquisition framework that systematically identifies, develops, and delivers sites in underserved areas. The following framework draws on the broadband precedent, international practice, and the emerging evidence base from community-led EV charging initiatives in the UK and Europe.

Principle 1: Treat charging access as a utility right, not a market outcome

The fundamental reframing required is to treat access to EV charging, within a reasonable distance and at a reasonable cost, as a right comparable to access to broadband or mains electricity. This does not require public ownership of charging infrastructure. It requires a universal service framework that defines minimum coverage standards, places obligations on network operators to meet them, and provides the public funding necessary to make uneconomic sites viable.

A 'Charge Access Obligation', modelled on Ofcom's broadband USO, could define, for example, that every UK resident should have access to a public charge point capable of delivering at least 50 kW

within a 20-minute drive. This is not a utopian standard: it is the threshold that Be.EV's CEO has described as 'good enough' for rural communities. Defining and enforcing it would immediately create accountability for the current coverage gaps and a mechanism for directing public investment to fill them.

Principle 2: Build a national site identification database

The broadband rollout was accelerated by the creation of detailed geographic coverage maps, making visible for the first time exactly which premises lacked access and at what cost. An equivalent national EV charging site identification database, mapping grid headroom, planning constraints, land ownership and potential utilisation at a postcode level, would transform the ability of CPOs, local authorities, and community groups to identify and prioritise acquisition targets in underserved areas.

The data exists in fragmented form across DNOs, Ordnance Survey, Land Registry, DfT, and local authority records. Aggregating and publishing it, as a public good analogous to DCMS's broadband coverage checker, would be a relatively low-cost intervention with potentially high leverage. It would also enable the kind of strategic spatial planning that NESO is now applying to grid infrastructure, applied to charging infrastructure for the first time.

Underserved site types

- Parish and village car parks
- Community centres and village halls
- Rural pubs and hospitality venues
- NHS primary care and community health sites
- Rural train stations and bus interchanges
- Farm shops and rural attractions
- Places of worship with car parks
- Local authority leisure centres
- Social housing estates
- Ex-mining and industrial communities

Land acquisition enablers needed

- Standardised community lease templates
- DNO rural grid connection subsidy
- Capacity-building support for parish councils
- Match-funded community hub vouchers
- Pre-approved planning frameworks
- Long-term revenue sharing with host communities
- Mobile/off-grid BESS hybrid charging units
- Regional EV charging coordinators
- Anchor tenant model (NHS, local authority)
- Tourism route charging corridors

Principle 3: Create standardised community lease structures

One of the biggest practical barriers to rural and community site acquisition is the absence of standardised, accessible legal and commercial frameworks. A professional retail landlord has a property team, legal advisors, and a clear understanding of the commercial terms available. A parish council or community organisation does not; the cost and complexity of negotiating bespoke leasehold agreements from scratch frequently causes deals to stall or fail.

A library of standardised community EV charging lease templates, developed by central government in partnership with CPOs, local authority associations and community sector bodies, would dramatically reduce the transaction cost of rural and community site acquisition. This is precisely what the Broadband Delivery UK programme did for telecoms wayleave agreements, reducing the time and cost of rural fibre deployment by standardising the legal framework. The EV sector needs an equivalent.

Principle 4: Use anchor tenants to de-risk rural deployment

In the broadband rollout, public sector anchor tenants, including schools, GP surgeries, libraries and council offices, played a critical role in making rural infrastructure economically viable. A school or health centre guaranteed a minimum level of connectivity demand, which justified the capital expenditure on the local exchange and enabled commercial providers to extend service to surrounding residential premises.

The same model applies to EV charging. An NHS primary care centre, a rural secondary school, or a local authority leisure facility with an EV charger provides a guaranteed demand anchor, drawing on staff, visitors and fleet vehicles, which can make the economics of a rural hub work. It also provides a visible, trusted, community-embedded installation that normalises EV charging in communities where awareness and confidence are low. Public sector estate procurement, coordinated through NHS Property Services, the Department for Education and DLUHC, could become a primary mechanism for seeding EV charging in underserved communities.

Principle 5: Mobile and off-grid charging as a bridging solution

Not every rural community needs a permanent, grid-connected charging hub in the near term. For remote and island communities where grid connection costs are prohibitive, mobile charging units and BESS-backed off-grid hubs offer a practical bridging solution. Scotland's experience with remote community charging, supported by the £60,000 hospitality venue grant scheme and the Highland and Islands Electric Vehicle Infrastructure project, demonstrates that purpose-built solutions for the most remote communities can be commercially and operationally viable, particularly where rural tourism generates seasonal demand.

Co-locating BESS with rural charging hubs solves two problems simultaneously: it eliminates or reduces the need for costly grid reinforcement, and it creates a local energy storage asset that can provide additional grid services revenue to the host community or organisation. This is the model that commercial ultra-rapid hub operators are adopting for urban locations. With appropriate subsidy and a community ownership model, it is equally applicable to rural village halls, farm shops, and tourist destinations.

5. The Role of Commercial CPOs: Obligation and Opportunity

The argument for equitable EV charging does not require commercial operators to abandon financial discipline. It requires them to recognise that the long-term commercial opportunity in underserved markets is larger than their current site acquisition strategies suggest, and the policy and reputational risk of a charging infrastructure rollout that visibly excludes large parts of the country is a material business risk.

The underserved market is a real commercial opportunity

Zapmap data identifies over 68,000 potential charge-point sites across Great Britain; 79% are in rural or semi-rural areas, with fewer than 1% currently operational. This is not a market that has been assessed and found wanting. It is a market that has not been seriously assessed at all, because the commercial frameworks, site development tools, and grid connection strategies that would make it viable have not been developed.

The rural tourism economy alone generates £1.4 billion per year in Scotland. European data from community charging deployments shows that retail spending in communities with public charging infrastructure increases by 12–18%, and that property values within half a mile of charging hubs rise by 3–5%. These are not trivial economic effects. A CPO that develops a systematic approach to rural and community site acquisition, including standardised lease structures, BESS co-location and anchor tenant partnerships, will access a market of significant scale that its competitors have largely ignored.

The policy risk of inaction

The UK government's ZEV mandate requires 80% of new car sales to be electric by 2030 and 100% by 2035. That mandate is politically and legally impossible to defend if large sections of the electorate cannot practically own an EV because they cannot charge one. The pressure for a regulatory intervention, whether a charging access obligation, a geographic coverage condition on operating licences or a direct cross-subsidy mechanism, will grow in proportion to the visibility of the coverage gap. CPOs who are seen to be part of the solution will be better positioned than those who are not.

"The business case for rural EV charging is not absent; it is immature. The operators who invest now in developing the land acquisition tools, grid strategies, and community partnerships for underserved markets will find themselves with a structural advantage as policy and consumer demand inevitably force the network to expand beyond its current boundaries."

6. Policy Recommendations

The following recommendations are directed at government, network operators, and local authorities. They are designed to be implemented in parallel rather than in sequence, as the urgency of the coverage gap does not permit a staged approach.

For government

- **1.** Introduce a Charge Access Obligation defining minimum coverage standards by geography, with enforcement via Ofgem or OZEV and a public funding mechanism to make uneconomic sites viable.
- **2.** Scale the Rural EV Charging Fund to a quantum commensurate with the geographic challenge: the current £7m allocation is insufficient by at least one order of magnitude.
- **3.** Commission a national EV charging site identification database, aggregating DNO, Land Registry, DfT, and local authority data into a publicly accessible coverage and opportunity map.
- **4.** Develop and publish standardised community EV charging lease templates through OZEV, in partnership with the Local Government Association and the National Association of Local Councils.
- **5.** Require NHS Property Services, the Department for Education, and DLUHC to incorporate EV charging into public estate procurement as a default condition for new and refurbished facilities.
- **6.** Establish a Community EV Hub voucher scheme on the model of the Gigabit Broadband Voucher Scheme, providing match-funded grants enabling community organisations to commission local charging infrastructure.

For charge point operators

- **7.** Develop rural and community site acquisition as a distinct capability, with specialist teams, tailored lease structures, and BESS co-location models designed for lower-utilisation sites.
- **8.** Engage proactively with local authority EV strategies and parish council networks as a source of site pipeline, rather than relying solely on commercial property relationships.
- **9.** Adopt an 'outside-in' portfolio strategy that sets explicit targets for rural and community site deployments as a proportion of total network expansion.

For local authorities and communities

- **10.** Use the LEVI scheme and Rural England Prosperity Fund to commission community charging hubs at public buildings, leisure centres, and village car parks, treating these as essential infrastructure investments rather than commercial ventures.
- **11.** Develop EV charging requirements into local plans and neighbourhood plans, designating suitable sites and establishing planning frameworks that reduce delay and cost for community-led installations.
- **12.** Engage with rural landowners, estate owners, and hospitality businesses as potential host sites, offering support with lease negotiation, planning consent, and grid connection applications.

Conclusion

The broadband rollout left a generation of rural and deprived communities behind, not through deliberate exclusion, but through the natural logic of a market allowed to optimise for commercially attractive locations first. The digital divide that resulted took over a decade and billions of pounds of public investment to close, and in some of the most remote communities, it has not closed yet. We are at risk of repeating that outcome in the EV charging transition.

The good news is that we are not yet a decade into the EV charging rollout. The network has grown to 120,388 public chargers, a real achievement. But the coverage gap is visible, measurable, and, with appropriate policy intervention, addressable. The tools exist: standardised leases, community voucher schemes, anchor tenant models, BESS-backed off-grid charging, and a national site database. The precedent exists in the broadband rollout. The commercial opportunity exists in 68,000 unserved sites, 79% of which are in the rural and semi-rural communities most in need.

What is required is the political and commercial will to treat EV charging infrastructure as a public utility, as essential to the functioning of modern life as running water, mains electricity, or a broadband connection; applying the same level of strategic coordination, public investment and equity obligation that we eventually, if belatedly, applied to those. The same level of strategic coordination, public investment, and equity obligation that we eventually, if belatedly, applied to those.

The EV transition can be something the whole country goes on together. But only if the people responsible for building the network deliberately choose to make it so.

About the Author

Mark Winn is a Director and Co-founder of Learel, a fractional growth consultancy working with founders and leadership teams in the energy transition. He has spent six years in senior commercial roles at the intersection of EV charging infrastructure, energy storage and clean energy technology. As Director of Site Acquisitions (EV Charging) at SMS plc, he built and stewarded a £100m+ CapEx pipeline of ultra-rapid EV charging hubs, a body of work that contributed directly to the successful divestment of the EV business to Believ, part of Liberty Global Ventures. He subsequently held the role of Head of Site Acquisitions (Private Sector) at Believ, continuing to lead the private sector commercial strategy post-acquisition. He writes regularly on the commercial, strategic and policy dimensions of the UK energy transition.

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This paper reflects the author's independent analysis and views and does not constitute policy, legal, or investment advice.