

Scotland's EV Charging Network in Transition

Executive Briefing

**Trends In ChargePoint Utilisation Across
the ChargePoint Scotland Network
July 2025 to June 2026**

1. Executive summary

Purpose. This briefing summarises the main national and local-authority trends, identifies material anomalies, and sets out why free monthly utilisation data should remain available after CPS closes.

Evidence base. Monthly CPS Network Performance Summaries, charge-point reports, session files and the CPS all-units asset register. Public/private classification is based on the asset register access field; unmatched records are retained as “Unknown”.

The central finding. The fall in ChargePlace Scotland utilisation is primarily a transition-of-data story, not a simple demand story. As chargers migrate to new operators, their sessions and energy disappear from the CPS reporting perimeter. The effect is uneven by region and by access type, with fleet/private chargers often leaving first.

Headline Trends - Public and private/non-public charging utilisation, July 2025 to June 2026

Official CPS public kWh	CPS units reported	Estimated migration effect	Classified energy
-47.8%	-30.3%	63-72%	92.8% public
July 2025 to June 2026	2,791 to 1,946	Share of apparent kWh decline	7.2% private/non-public

- Official CPS public-network energy fell from 2.24 GWh in July 2025 to 1.17 GWh in June 2026, a 47.8% reduction. Over the same period, the number of CPS units reported fell by 30.3%.
- A simple decomposition attributes 63% of the kWh fall to the loss of chargers from the reporting perimeter. A counterfactual based on local authorities with stable charger counts raises the estimate to 72%. The defensible conclusion is that roughly two-thirds of the apparent decline is migration-related.
- Across the session files, 21.17 GWh was classified as public, 1.63 GWh as private/non-public and 0.97 GWh remained unclassified. Public charging represented 92.8% of classified energy over the year.
- The private/non-public series is discontinuous. Its share of classified energy was 14-19% from July to October 2025, then fell below 0.5% from November onward. This is far more consistent with fleet/private chargers leaving CPS or a reporting change than with a sudden collapse in fleet charging demand.
- Edinburgh provides the clearest staged-migration case study: private/non-public energy fell by around 99% between October and November 2025, while the larger public-estate fall occurred later, especially between March and April 2026.
- September 2025 is a material data anomaly. The official summary reports about 1.23 GWh and 59,963 public sessions, while the detailed session file contains about 2.47 GWh and 128,397 records. Both values should be retained and flagged rather than reconciled through an undocumented adjustment.
- The post-CPS data model matters. Current UK open-data rules require public charger reference and availability data, but not this same granular monthly record of sessions and energy. A national, free, machine-readable utilisation dataset is therefore still required.

Interpretation guidance

The 47.8% decline in public-charging utilisation on the CPS network is not fall in demand for charging. It is a fall in energy recorded within the CPS network as chargers migrate to other operators.

2. The national CPS utilisation picture

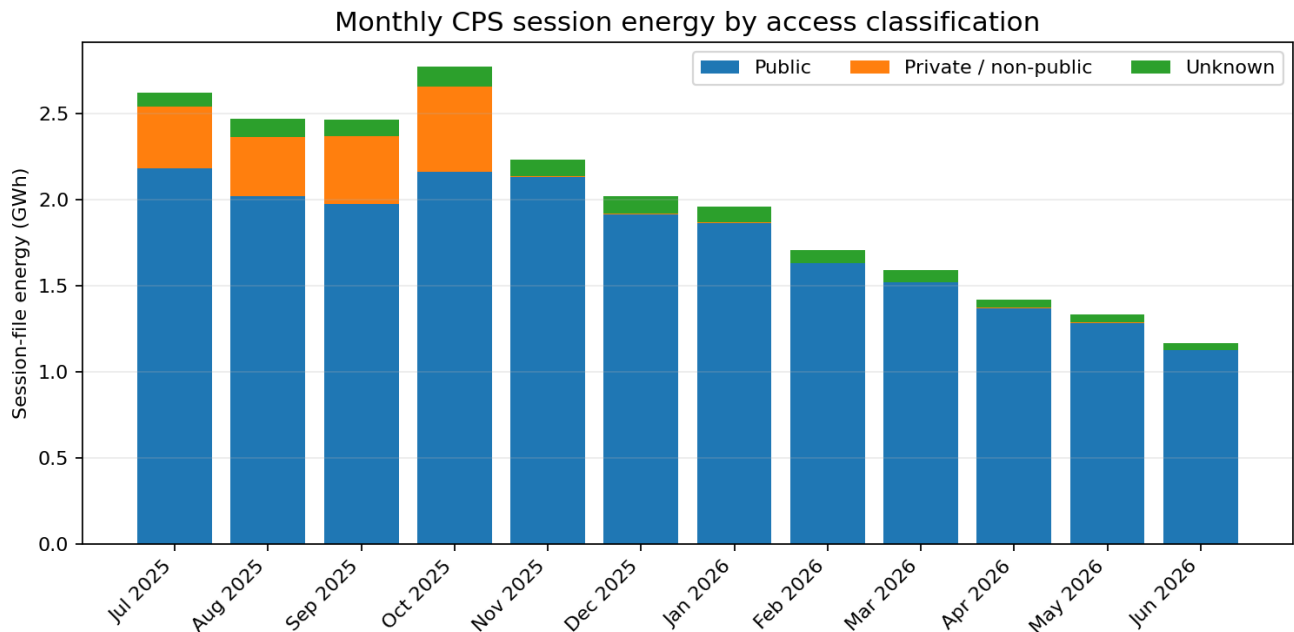


Figure 1. Monthly CPS session energy by access classification

Source: CPS monthly session files; CPS all-units asset register; author analysis.

Public charging dominates the classified dataset, but the annual average hides a structural break.

Private/non-public charging contributed 358 MWh in July, 497 MWh in October and only 8 MWh in November. By June it was 3 MWh. Public energy declined more gradually, broadly tracking the number of units remaining in CPS.

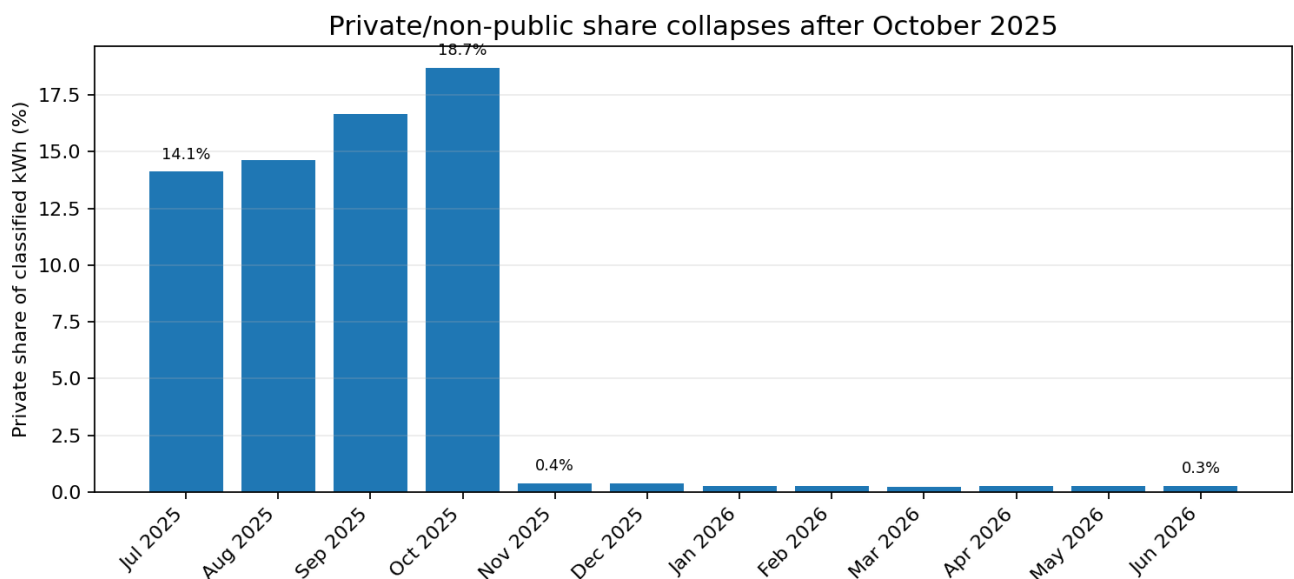


Figure 2. Private/non-public share of classified monthly session energy

Source: CPS monthly session files and asset-register access classification.

3. How much of the decline is due to CPS migration?

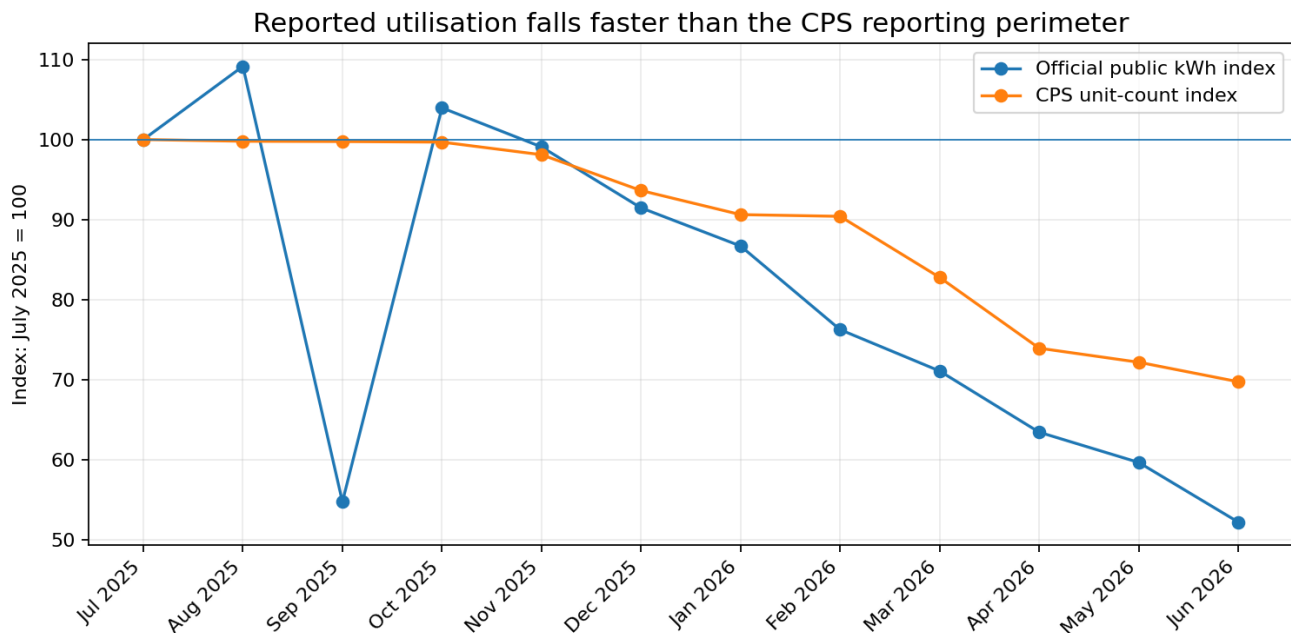


Figure 3. Indexed official public utilisation and CPS unit count

Source: CPS Network Performance Summaries and monthly charge-point reports.

Lower-bound calculation. Holding July utilisation per charger constant, the removal of 845 units explains approximately 63% of the 1.07 GWh July-to-June decline.

Migration-adjusted counterfactual. Local authorities whose unit counts changed by no more than 5% recorded a median -13.3% change in kWh per unit. Applying that underlying movement nationally implies that approximately 72% of the observed fall is attributable to the changing CPS perimeter.

Practical conclusion. Around two-thirds of the headline decline can reasonably be explained by migration. The remainder may reflect seasonality, utilisation changes, tariff effects, reliability, charger mix and competition from other networks. These components cannot be cleanly separated without successor-network session data and a fixed cohort of charger IDs.

4. The migration process across LA regions is uneven

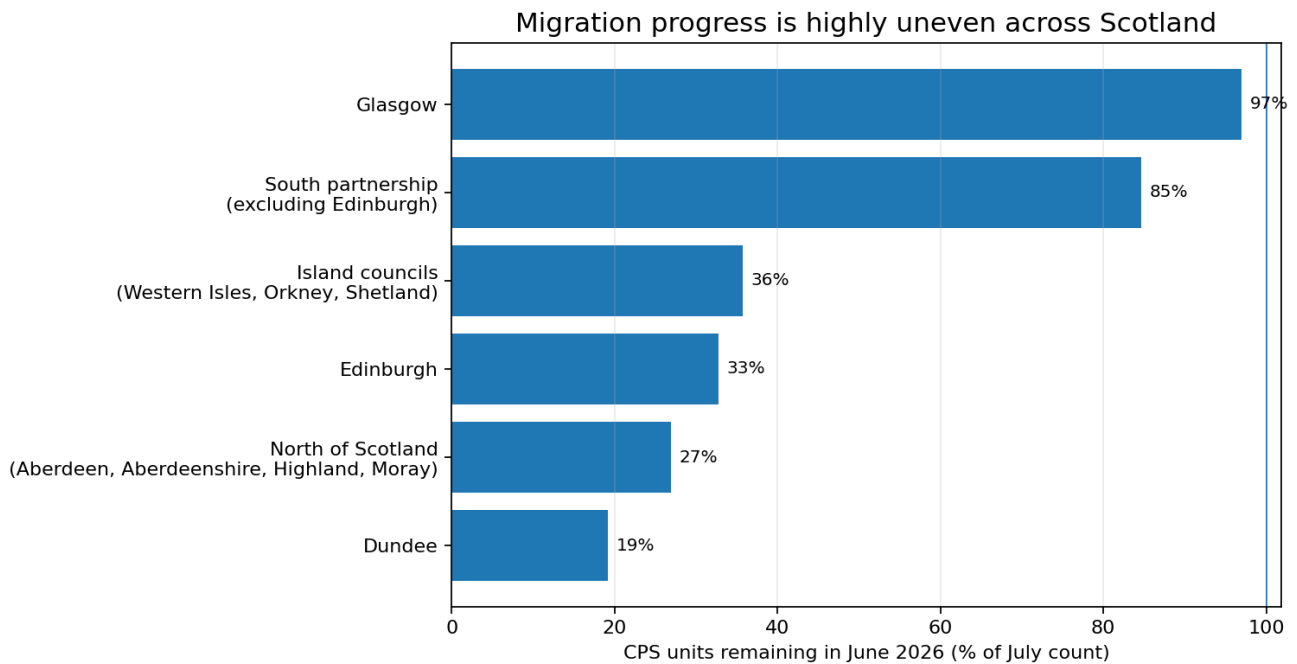


Figure 4. Regional migration proxy: CPS units remaining in June 2026

Source: Author aggregation of CPS monthly unit counts. This is a reporting-perimeter proxy, not a formal completion measure.

Furthest ahead. Dundee retained only 19% of its July CPS unit count. The four-council North of Scotland group retained 27%, Edinburgh 33%, and the three island councils shown retained 36%. The North programme formally began migration in September 2025, with transfers planned through January 2026.[4]

Further behind. Glasgow retained 97% of its July count, while the seven South of Scotland partnership councils excluding Edinburgh retained 85% collectively. Transport Scotland lists delivery of the wider South project from autumn 2026, which is consistent with the relatively limited unit-count contraction by June.[6]

Important qualification. Unit counts are a proxy. They can also change because of asset additions, corrections, ownership changes or temporary reporting issues. East Lothian and East Dunbartonshire recorded higher June counts than July, illustrating why formal migration status and unit-level history should be published alongside aggregate totals.

5. Council-by-council view

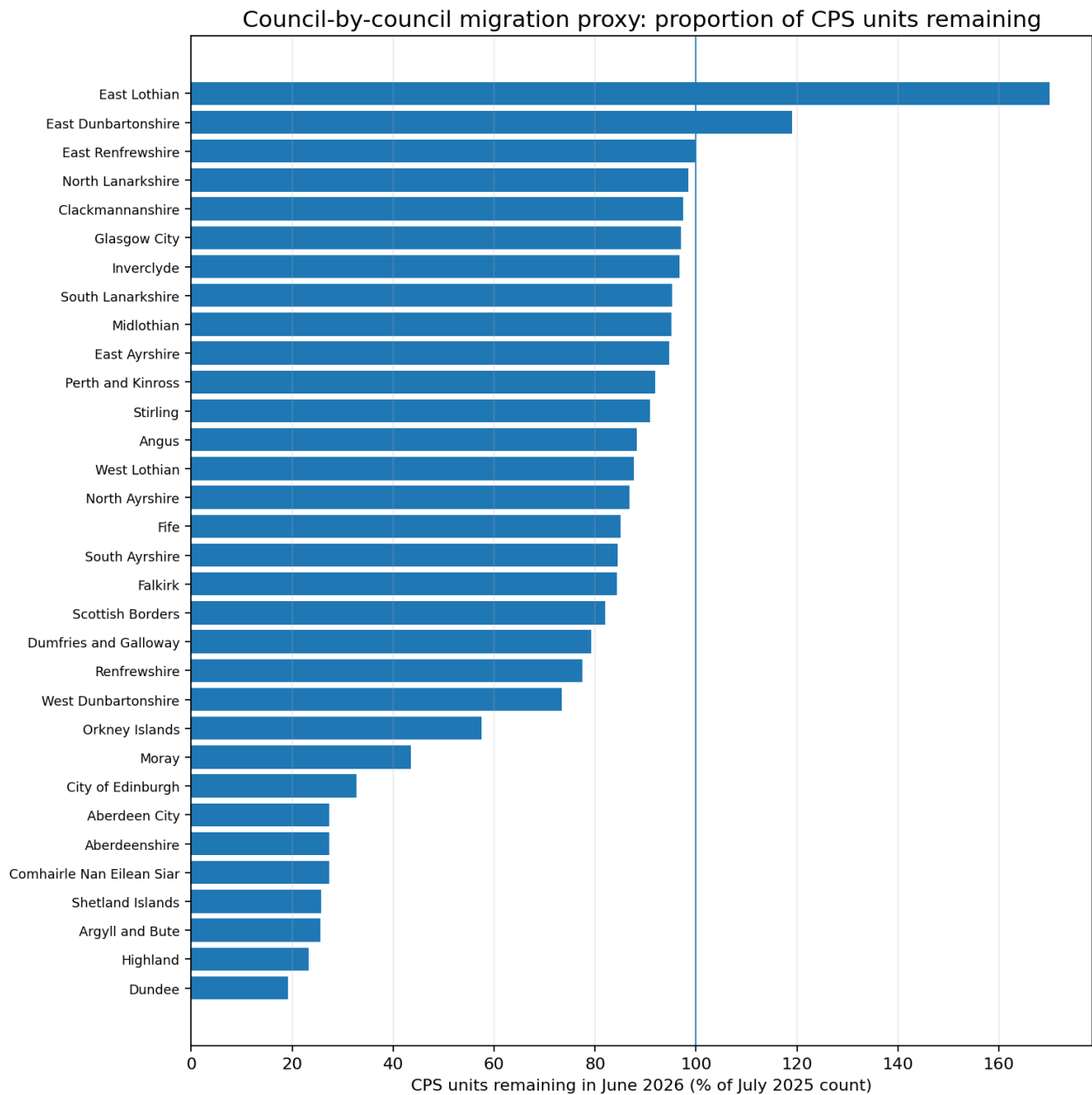


Figure 5. Percentage of July CPS units still reported in June

Source: CPS monthly charge-point reports. Values above 100% may reflect additions or data revisions.

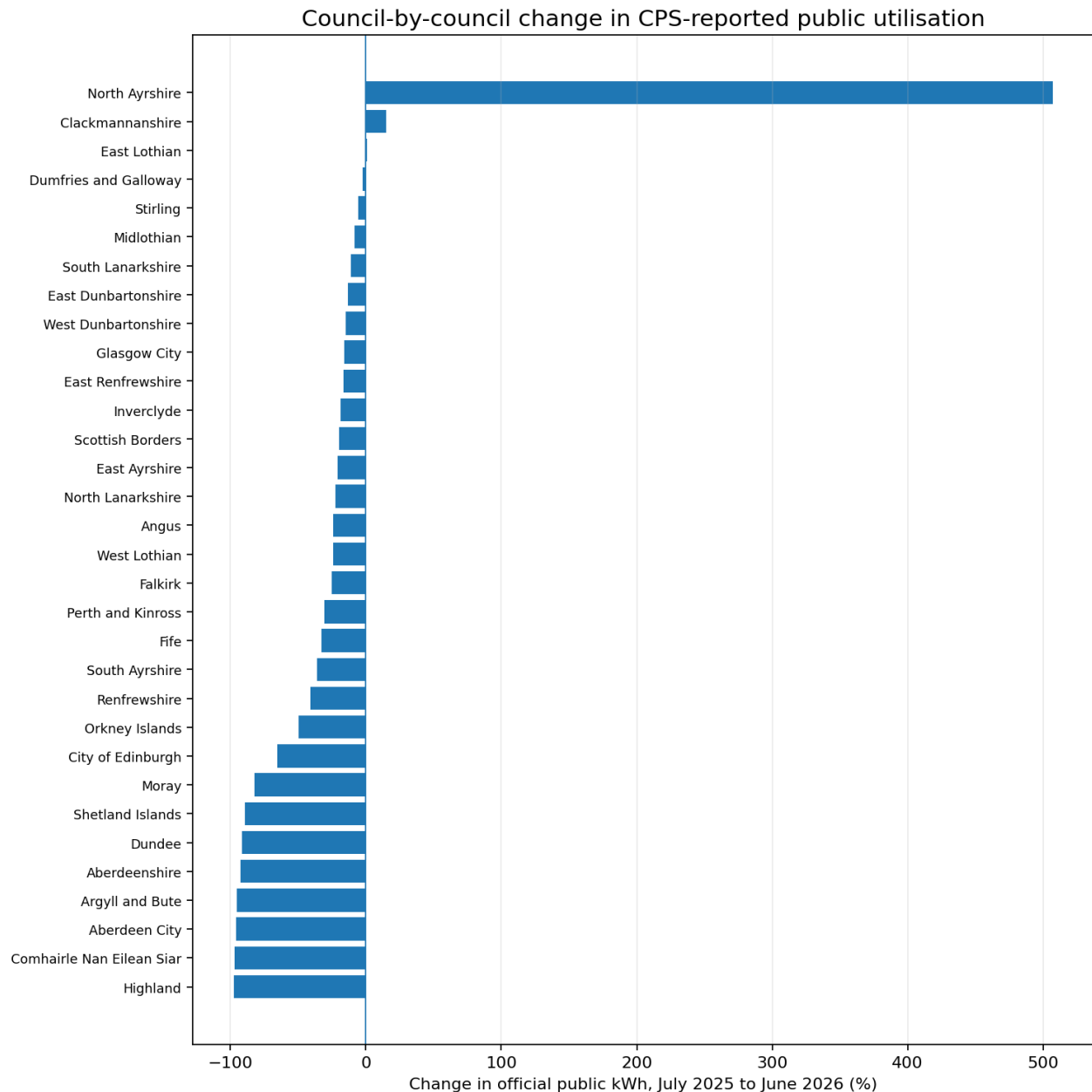


Figure 6. Change in official CPS public kWh by council

Source: CPS Network Performance Summaries.

The two charts should be read together. Large kWh falls accompanied by large unit-count falls are predominantly migration/perimeter effects. Large kWh falls with stable unit counts are more likely to represent genuine utilisation changes, changes in charger availability or competition from chargers outside CPS. Edinburgh is unusual because kWh per remaining unit increased slightly, confirming that its aggregate decline was almost entirely caused by the shrinking CPS estate.

Council scorecard (1 of 2)

Council	Jul public kWh	Jun public kWh	Public kWh change	Units remaining	Private share 12 months
Aberdeen City	70,105	3,023	-96%	27%	5.2%
Aberdeenshire	92,098	6,597	-93%	27%	7.8%
Angus	47,291	35,954	-24%	88%	0.6%
Argyll and Bute	88,156	3,917	-96%	26%	4.2%
City of Edinburgh	170,175	58,876	-65%	33%	15.4%
Clackmannanshire	18,028	20,731	15%	97%	3.8%
Comhairle Nan Eilean Siar	29,842	864	-97%	27%	2.7%
Dumfries and Galloway	67,405	65,788	-2%	79%	5.8%
Dundee	141,982	12,240	-91%	19%	15.8%
East Ayrshire	75,896	60,135	-21%	95%	6.4%
East Dunbartonshire	22,034	19,091	-13%	119%	n/m
East Lothian	1,897	1,913	1%	170%	68.5%
East Renfrewshire	11,512	9,614	-16%	100%	n/m
Falkirk	90,928	68,065	-25%	84%	7.2%
Fife	129,594	86,906	-33%	85%	9.0%
Glasgow City	128,028	107,640	-16%	97%	10.6%

Notes: "Units remaining" is June unit count divided by July unit count. Private share is based on classified session-file kWh and is affected by the private-series break after October 2025. 'n/m' indicates that negative adjustment records make the share not meaningful.

Council scorecard (2 of 2)

Council	Jul public kWh	Jun public kWh	Public kWh change	Units remaining	Private share 12 months
Highland	267,987	6,942	-97%	23%	3.3%
Inverclyde	14,439	11,752	-19%	97%	10.5%
Midlothian	30,695	28,198	-8%	95%	3.3%
Moray	52,855	9,387	-82%	44%	8.8%
North Ayrshire	6,056	36,782	507%	87%	35.6%
North Lanarkshire	97,979	75,783	-23%	99%	5.4%
Orkney Islands	20,478	10,351	-49%	58%	0.3%
Perth and Kinross	117,170	81,268	-31%	92%	4.5%
Renfrewshire	66,297	39,173	-41%	78%	5.7%
Scottish Borders	49,342	39,460	-20%	82%	2.1%
Shetland Islands	18,022	1,888	-90%	26%	9.3%
South Ayrshire	40,962	26,181	-36%	84%	10.6%
South Lanarkshire	115,752	102,866	-11%	95%	n/m
Stirling	83,817	79,211	-5%	91%	7.2%
West Dunbartonshire	32,061	27,316	-15%	73%	6.9%
West Lothian	40,473	30,617	-24%	88%	2.6%

Notes: “Units remaining” is June unit count divided by July unit count. Private share is based on classified session-file kWh and is affected by the private-series break after October 2025. ‘n/m’ indicates that negative adjustment records make the share not meaningful.

6. Edinburgh: evidence of a staged migration

Edinburgh: private charging disappears before the public-estate fall

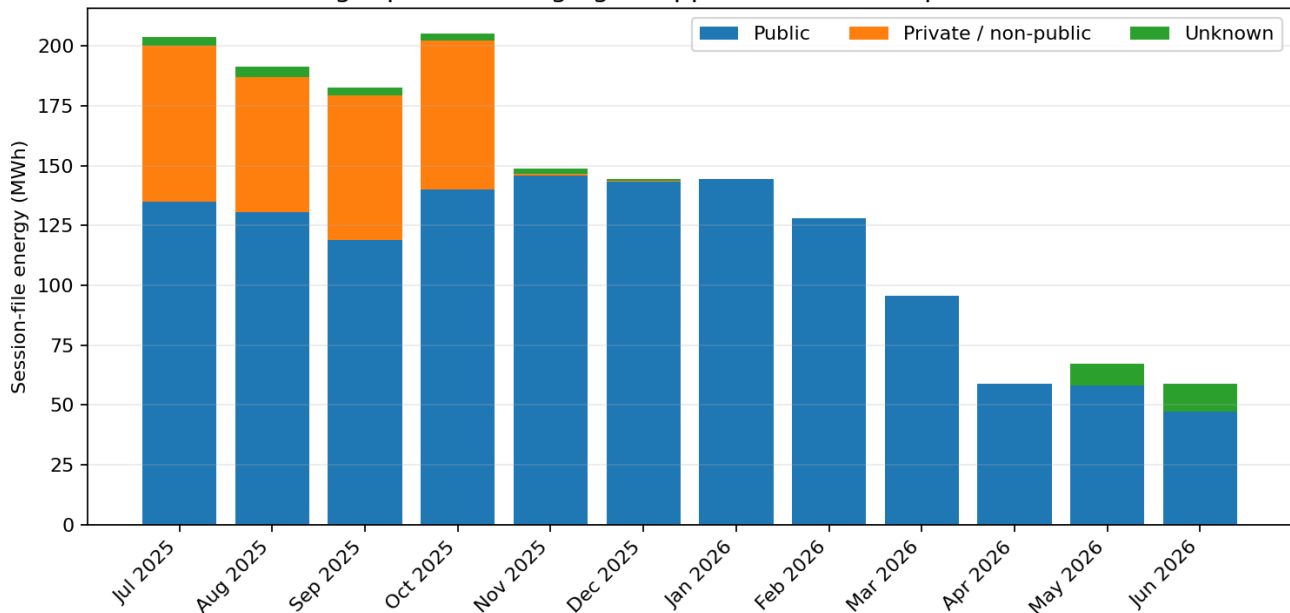


Figure 7. Edinburgh public and private/non-public session energy

Source: CPS monthly session files; CPS asset-register access classification.

Stage 1 - restricted-access estate. Private/non-public energy fell from 62.1 MWh in October to 0.7 MWh in November, a 98.9% reduction, while public energy increased. This strongly suggests that fleet/depot chargers were moved or ceased reporting first.

Stage 2 - public estate. The council's public CPS estate then contracted sharply in spring 2026. CPS unit count fell from 164 in March to 67 in April, while official public energy fell from 126.9 MWh to 70.1 MWh. Edinburgh Council had announced a phased move to Fuuse during February.[5]

Demand interpretation. Between July and June, Edinburgh's CPS unit count fell 67%, while official public kWh fell 65%. kWh per remaining unit rose by around 6%. The data therefore do not support a conclusion that Edinburgh charging demand collapsed; they show that activity moved outside CPS reporting.

7. Data anomalies and limitations

Issue	Implication
September 2025 reconciliation failure	Official public summary: 1.225 GWh and 59,963 sessions. Detailed session file: 2.465 GWh and 128,397 records. The difference is too large to treat as rounding or normal classification variance.
Private-series discontinuity	National private/non-public energy fell 98% between October and November. The same break is visible in several councils. This is most plausibly a migration or source-system change.
Negative adjustment records	The session files contain negative consumption entries, especially in 2025. Raw-net totals preserve these corrections; positive-only totals answer a different question.
Unclassified activity	Approximately 0.97 GWh remained unmatched to a Public/Private asset classification. It is reported separately rather than forced into either category.
Location is not ownership	The local-authority field identifies where a charger is located, not who owns it. Private/non-public chargers may support councils, NHS bodies, emergency services, universities, businesses or other fleets.
Changing charger mix	Migration may prioritise particular charger types, locations or owners. Aggregate kWh per unit can therefore change even if site-level demand is stable.

8. The post-CPS data requirement

The transition creates a risk of losing the most valuable feature of the CPS model: a single, free monthly evidence base. After migration, activity will be distributed across EZO, Fuuse, Evolt, ScottishPower and other back-office providers. Without a common reporting requirement, national and local trends will become harder to reconstruct precisely when councils, communities, investors and policymakers need better evidence.

Existing open-data rules are necessary but insufficient. The Public Charge Point Regulations require public charger reference and availability data to be made freely available in machine-readable form.[8] They do not provide an equivalent public requirement for monthly session counts, energy delivered, failed sessions or utilisation by geography. Transport Scotland's draft implementation plan explicitly calls for open-source data to review local provision and monitor the Scottish rollout.[7]

Commercial data has a role, but should not become the public evidence layer. Services such as Zapmap Insights offer valuable utilisation and location analytics.[9] They should complement, rather than replace, a free national dataset. Local authorities, community organisations, researchers and smaller

market participants should not need a commercial subscription to understand how publicly supported infrastructure is performing.

Recommended minimum monthly open dataset

Persistent charger/EVSE ID; site and local authority/data-zone geography; owner and operator; public/private access status; power rating; migration date and successor network; session count; kWh delivered; zero/failed sessions; uptime and downtime; tariff; and clear revision flags. Data should be downloadable, machine-readable, historically archived and free at the point of use.

Questions for stakeholders

- Who should own and publish the national post-CPS utilisation dataset?
- Should EV Infrastructure Fund and concession contracts require monthly open utilisation reporting as a contractual condition?
- How should commercially sensitive fleet data be aggregated while preserving its value for planning?
- What common identifiers will allow a charger to be followed across CPS and successor networks?
- How will rural, island and low-utilisation sites remain visible in national investment and reliability analysis?

Methodology and sources

The analysis covers July 2025 to June 2026. Official public-network kWh, sessions and unit counts are taken from CPS monthly Network Performance Summaries and charge-point reports. Session-file consumption was assigned to Public, Private or Unknown using the CPS all-units asset register. “Private” is treated as non-public/fleet or business-only access but does not identify the consuming organisation. Monthly totals retain published negative adjustments. Migration progress is inferred from changes in CPS-reported unit counts and should be treated as a proxy, not a formal completion status.

Ref	Source	URL
[1]	ChargePlace Scotland, Monthly Charge Point Performance archive	https://chargeplacescotland.org/monthly-charge-point-performance/
[2]	ChargePlace Scotland, Transition Resource Hub	https://chargeplacescotland.org/transition-resource-hub/
[3]	Scottish Government FOI 202500480850, CPS public and non-public/fleet data	https://www.gov.scot/publications/foi-202500480850/
[4]	Moray Council, Migration to begin for public EV charging units in north of Scotland, 8 September 2025	https://newsroom.moray.gov.uk/news/migration-to-begin-for-public-ev-charging-units-in-north-of-scotland
[5]	City of Edinburgh Council, Transport and Environment Committee Business Bulletin, 29 January 2026	https://democracy.edinburgh.gov.uk/documents/s93336/Business%20Bulletin%20-%20TE%20January%202026.pdf

[6]	Transport Scotland, Electric Vehicle Infrastructure Fund - South of Scotland partnership	https://www.transport.gov.scot/our-approach/environment/electric-vehicle-infrastructure-fund/
[7]	Transport Scotland, Draft Electric Vehicle Public Charging Network Implementation Plan	https://www.transport.gov.scot/media/kupoeq0l/electric-vehicle-public-charging-network-implementation-plan.pdf
[8]	UK Government, Public Charge Point Regulations 2023 guidance	https://www.gov.uk/government/publications/the-public-charge-point-regulations-2023-guidance/public-charge-point-regulations-2023-guidance
[9]	Zapmap, Zapmap Insights - Utilisation	https://www.zap-map.com/for-business/products/data-and-insights/utilisation

Prepared as an independent evidence briefing for stakeholder discussion. Values are rounded for presentation; the accompanying workbook contains the detailed monthly local-authority data.