

Greater Manchester Combined Authority

Date: Friday 28th November 2025

Subject: Electric Vehicle Charging Pricing

Report of: Paul Dennett, Deputy Mayor of Greater Manchester and Caroline Simpson,
Group Chief Executive, GMCA

Purpose of Report

This report seeks approval to enhance pricing flexibility for the publicly owned electric vehicle (EV) charging infrastructure. The aim is to ensure the publicly owned EV infrastructure, part of the Be.EV network, remains responsive to market conditions while upholding a commitment to fair, consumer-focused pricing.

Recommendations:

The GMCA is requested to:

1. Delegate the function of making all tariff pricing decisions for the publicly owned electric vehicle infrastructure, (managed and operated by Iduna Infrastructure Ltd as part of the Be.EV network) to Transport for Greater Manchester; and
2. Agree that Transport for Greater Manchester will report on the outcomes of all tariff pricing decisions as part of the Quarterly Revenue Monitoring reports to the GMCA.

Contact Officers

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Equalities Impact, Carbon and Sustainability Assessment:

No direct impacts.

Risk Management

Currently, a standard pricing structure is applied across all sites, with each location offering the same price per kWh. Pricing is according to membership tier and charging speed. However, this approach may not accurately account for the distinct characteristics or demand patterns of individual locations, potentially leading to less effective pricing strategies, diminished competitiveness, and missed opportunities to optimise utilisation at specific sites.

Legal Considerations

The contract with Iduna Infrastructure Limited for the Electric Vehicle Charging Infrastructure enables the PAYG tariff to be agreed jointly between the parties following the principles set out in the contract which reflect the shared ambitions to introduce dynamic pricing at an appropriate time and to be informed by market analysis.

Financial Consequences – Revenue

TfGM's Director of Finance, Commercial and Corporate Services will:

- Conduct thorough financial analysis to assess the impact of any proposed pricing adjustments on TfGM's revenue budget;
- Regularly monitor and review the effects of all pricing changes to ensure they achieve desired net revenue, utilisation, and policy objectives;
- Document and justify all pricing adjustments with robust financial reasoning and supporting evidence; and
- Report on the outcomes of all pricing decisions as part of the Quarterly Revenue Monitoring reports to the GMCA.

Financial Consequences – Capital

There are no capital funding requirements as a result of the proposals contained in this report.

Number of attachments to the report: None

Background Papers

GMCA 27 October 2023 Electric Vehicle Charging Tariff

GMCA 25 March 2022 Greater Manchester Electric Vehicle Charging Tariff

GMCA 29 November 2019 Greater Manchester Electric Vehicle Charging Proposal

GMCA 26 January 2018 Transport Budget for 2018/19

Tracking/ Process

Does this report relate to a major strategic decision, as set out in the GMCA Constitution ?

No.

Exemption from call in

Are there any aspects in this report which means it should be considered to be exempt from call in by the relevant Scrutiny Committee on the grounds of urgency?

N/A

Bee Network Committee

N/A

Overview and Scrutiny Committee

N/A

1. Background

- 1.1. The Greater Manchester Strategy (GMS) sets out a bold vision for a thriving city region where everyone can live a good life. It focuses on two interlocking priorities: growing the economy and ensuring residents can live well.
- 1.2. Seven workstreams underpin this vision, including transport, housing, digital connectivity, and community safety. For transport, the aim is to develop the Bee Network as a transport system for a global city region; making it even easier to get around, connecting every community like never before.
- 1.3. Transport has an important role in delivering the GMS aim of making GM a greener city region, with an ambition for GM to be carbon neutral by 2038. One way in which transport can help GM decarbonise is through the provision of charging infrastructure for electric vehicles.
- 1.4. As of July 2025, there are 1,771 publicly accessible electric vehicle charging devices in Greater Manchester. Of these, 465 are branded as part of the Be.EV network, 213 of these are owned by TfGM (with Iduna Infrastructure Ltd owning the remainder).
- 1.5. The Be.EV brand is owned by Iduna Infrastructure Ltd¹ (Iduna) who have a contract with TfGM to operate and maintain Greater Manchester's publicly owned electric vehicle (EV) charging infrastructure.
- 1.6. Whilst there are contractual arrangements in place around tariff setting, in that both parties can set their own, there is a non-binding agreement to have a unified rate so that there is a Be.EV tariff, rather than different rates depending on ownership, which is intended to improve the customer experience by providing consistent pricing.
- 1.7. When charging for Greater Manchester's publicly owned EV charging infrastructure was introduced in late 2021, public infrastructure made up nearly all of the network. After investment from Octopus Energy Generation in Iduna, the Be.EV network expanded significantly. By the end of 2023, most usage came from supplier-owned infrastructure. At the start of 2024, supplier-owned chargers provided 53% of network volume and 35% of bays. This has now risen to 85% and 58% respectively,

¹ In April 2021 the Amey MAP Services unit, which delivers the EV contract, was divested by Amey plc to Iduna Infrastructure Ltd.

with projections that this will further extend to 90% and 66% by the end of 2025. TfGM therefore now increasingly owns a minority of the charging infrastructure across the network.

- 1.8. Tariffs have previously been driven by the cost of electricity that is being supplied to the consumer, with an additional element to cover the operation and maintenance costs. Effectively, in setting an EV tariff, TfGM is aiming to recover its costs and minimise subsidy from the Transport Levy.
- 1.9. In October 2023, GMCA delegated authority to the Chief Executive of the GMCA and TfGM to approve tariff changes within a 'floor and ceiling price cap' of 30% above and below the existing EV tariffs. This arrangement was designed to strike a balance between protecting consumers, retaining transparency and being responsive and adaptable to a changing market. However, while the price cap mechanism provides some agility, it does not offer sufficient flexibility to address the changing market dynamics and customer needs now facing the network.
- 1.10. The electric vehicle charging sector operates within a rapidly shifting landscape, influenced by fluctuations in energy prices, evolving consumer expectations, advancing technology, and increasing competition. The network must respond to shifts in usage patterns as EV adoption grows. Additionally, as more drivers switch to EV, customer needs are becoming more diverse, with demand rising for faster charging speeds, flexible payment options, and value-added services such as subscriptions and / or loyalty schemes. These market dynamics create pressures and opportunities, requiring further agility in pricing and service provision to maintain both customer satisfaction and the financial viability of the network.
- 1.11. To safeguard the sustainability and competitiveness of the publicly owned assets, it is therefore necessary to be able to work with Iduna in setting Be.EV pricing beyond the constraints of the current price cap and to explore market-leading innovations for the Be.EV network such as subscriptions, fleet-charging products, site-specific pricing.

2. Proposal

- 2.1. It is proposed that TfGM be delegated the authority to make all pricing decisions for the publicly owned EV infrastructure within the Be.EV network managed by Iduna. This delegation would extend to:
- Product pricing for all charge point types and speeds;
 - Promotional discounts and marketing-led pricing initiatives; and
 - The introduction of new pricing models, including subscriptions, fleet offers, and site-specific rates.
- 2.2. In exercising this delegated authority, TfGM's Director of Finance, Commercial and Corporate Services will:
- Conduct thorough financial analysis to assess the impact of proposed pricing adjustments on revenue;
 - Regularly monitor and review the effects of all pricing changes to ensure they achieve revenue, utilisation, and policy objectives;
 - Document and justify all pricing adjustments with robust financial reasoning and supporting evidence; and
 - Report on the outcomes of all pricing decisions as part of the Quarterly Revenue Monitoring reports to the GMCA.
- 2.3. This delegation will allow TfGM to work with Iduna Infrastructure Ltd to respond rapidly to market dynamics, maintain competitive advantage, and ensure charging remains accessible and attractive to all users; and to ensure the sustainability of Greater Manchester's EV publicly owned charging infrastructure, providing the flexibility needed to adapt to a fast-changing market.