FDENERGY

GLOBAL ENERGY OUTLOOK

EV Charging & Energy Storage Briefing

A monthly briefing on global market developments, project opportunities and the business trends shaping EV charging and energy storage.

NOVEMBER 2026 · ISSUE 01

The infrastructure behind the energy transition is evolving.
EV charging is scaling. Energy storage is becoming a critical part of the power system.
The next competitive advantage is how well infrastructure is integrated, utilised and operated.

NOVEMBER 2026

The Market in Five Numbers

1.18M

Public recharging points across the EU-27 (EAFO preliminary, 29 Oct 2026)

32.4%

BEV share of new registrations in the 14 states in EAFO's preliminary October update

112 GW / 307 GWh

Global energy storage additions in 2025, excl. pumped hydro (BloombergNEF)

4 GW / 16 GWh

Standalone BESS capacity in the new SECI tender (Rajasthan & Gujarat, India)

20+ DC fast-charging stations

Minimum number estimated for Oregon's NEVI Round 3 funding opportunity

The Big Picture

EV charging and energy storage are moving beyond standalone equipment deployment. Network utilisation, grid constraints, energy costs, project financing and long-term operations are becoming increasingly important to investment decisions.

Our read: infrastructure competition has shifted from "installing more equipment" to "operating it better" — integration, utilisation and sustainability decide the next round of winners.

Sources: EAFO · BloombergNEF · SECI · Oregon Department of Transportation. See source notes on relevant pages.

Europe's Public Charging Network Continues to Expand

1,176,554

Public recharging points across the EU-27
(EAFO preliminary update, 29 October 2026)

The same update recorded 261,067 BEV registrations and a 32.4% BEV share across the 14 member states included in that month's preliminary registration data.

Note: the infrastructure and registration figures have different coverage; registrations should not be read as a complete EU-wide monthly total.

Looking Towards 2035

IEA Global EV Outlook 2026

Under the Current Policies Scenario, global public ultra-fast charging capacity grows more than fivefold between 2025 and 2035. In Europe, public charging capacity is projected to approach 200 GW by 2035.

Why It Matters

- The next phase is not simply about adding more charging points.
- Operators must balance site selection, grid connection capacity, charger power, utilisation and user experience.

For suppliers: Europe is moving from "point count" to "per-point efficiency" — high-power, scalable, low-opex solutions will win operator preference.

Sources: European Alternative Fuels Observatory, 29 Oct 2026; IEA, Global EV Outlook 2026.

Oregon Opens a New NEVI Funding Opportunity

On 21 October 2026, the Oregon Department of Transportation opened its third funding opportunity under the National Electric Vehicle Infrastructure (NEVI) programme.

Key points

Covers sections of 10 interstate and US/state highways; estimated to support at least 20 public DC fast-charging stations.
Application deadline: 22 January 2027; conditional awards intended by end of February 2027.

What Project Developers Should Note

- Funding is tied to eligible corridors and programme requirements.
- Technical specifications and operating obligations matter alongside equipment price.
- Site readiness, utility coordination and delivery capability influence project execution.
- Long-term service arrangements should be planned before a station goes live.

Business takeaway: public funding creates opportunities — but also raises the bar for compliance, documentation, reliability and local delivery support.

Source: Oregon Department of Transportation, NEVI programme update, October 2026.

Energy Storage Is Entering a New Scale of Deployment

112 GW / 307 GWh

Global storage additions in 2025, excl. pumped hydro
up 48% year on year (BloombergNEF)

BNEF's latest 2026 outlook points to another record year, with growth extending beyond established markets — India and Australia are among the emerging growth centres highlighted.

Three Developments to Watch

01 Renewables integration

Higher solar penetration increases the need for flexible capacity to shift energy across time.

02 Market diversification

New regional markets are expanding; local-content policies and trade measures are reshaping supply chains.

03 Technology evolution

Lithium-ion remains central, but alternative chemistries are attracting attention for stationary storage.

Beyond capacity

Duration, cycle life, efficiency, degradation, safety, dispatch strategy and revenue model all affect project economics.

Our read: storage competition is shifting from "installed capacity" to "realised revenue" — dispatch strategy and business model decide profitability.

Source: BloombergNEF, "Energy Storage Growth Surge Goes Global: Three Things to Know", October 2026.

India: A 4 GW / 16 GWh Standalone BESS Tender

The Solar Energy Corporation of India (SECI) published a tender on 28 October 2026 for the supply of energy from 4,000 MW / 16,000 MWh of standalone BESS in Rajasthan and Gujarat.

Procurement is based on tariff-based competitive bidding, targeting on-demand use of the contracted storage capacity.

Key Dates

Tender published	28 October 2026
Pre-bid meeting	6 November 2026
Online bid submission deadline	19 November 2026
Bid opening	24 November 2026

What This Signals

- The scale highlights India's growing focus on dispatchable storage capacity.
- Opportunities span system integration, power conversion, battery systems, controls, engineering and long-term operations.

A note for suppliers: a tender announcement is not an awarded project. Review the official RFS documents, qualification criteria, technical requirements and commercial terms first.

Source: Solar Energy Corporation of India, Tender SECI000296.

Five Questions Every Infrastructure Developer Should Ask

01 Is the site ready for the power requirement? Assess grid capacity, connection costs, transformer sizing and expansion plans before equipment selection.

02 What will drive utilisation? Traffic patterns, dwell time, local EV adoption, competing sites and pricing strategy all influence charger utilisation.

03 Does the system fit the operating model? Power sharing, modular expansion, payment systems, remote monitoring and local-standard compatibility affect daily operations.

04 Can energy costs be managed? Storage and intelligent energy management may help manage peak demand, time-of-use tariffs and renewables variability — economics depend on local tariffs and market rules.

05 Who is responsible after commissioning? Warranty scope, spare parts, response times, software updates and local service arrangements should be agreed before go-live.

Our view: the strongest projects will not necessarily have the highest installed power. They will align infrastructure design with site demand, grid conditions and a sustainable operating model.

Future Digital Energy

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DC	AC	SPLIT	ESS	PV+ESS
DC Fast Charging	AC Charging	Split High-Power Charging	C&I Energy Storage	Integrated Solar-Storage-Charging

Let's Build Better Energy Infrastructure

Whether you are developing a charging network, evaluating a new project or looking for an equipment and technology partner, we welcome a conversation.

Web: www.futdigit.com | Email: info@futdigit.com

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