



The Definitive Guide to Selecting a CPMS Migration Partner

What Every Charge Point Operator Needs to
Know When Switching Platforms

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Executive Summary

The EV charging industry is experiencing significant consolidation, with numerous CPMS providers shutting down operations or exiting the market. For charge point operators (CPOs), this creates both risk and opportunity—the risk of service disruption and the opportunity to upgrade to more capable, reliable platforms.

Selecting the right CPMS migration partner is one of the most critical decisions a CPO will make. A poorly executed migration can result in extended downtime, lost revenue, frustrated users, and operational chaos. Conversely, a well-managed migration can actually improve your operations, reduce costs, and position you for future growth.

This whitepaper provides a comprehensive framework for evaluating potential CPMS partners, identifying red flags, and asking the right questions to ensure a successful migration. Whether you're facing a forced migration due to provider shutdown or proactively seeking a better solution, this guide will help you make an informed decision.

The Current State of the CPMS Market

Industry Consolidation is Accelerating

The CPMS market has seen significant turbulence over the past 24 months. Several factors are driving consolidation:

- **Economic Pressures:** Rising cloud infrastructure costs, increased cybersecurity requirements, and the need for continuous feature development have made the CPMS business more capital-intensive than many early entrants anticipated.
- **Technical Complexity:** Supporting multiple OCPP versions (1.6J, 2.0.1), diverse charger hardware, various payment systems, and complex energy management requirements demands substantial engineering resources.
- **Competitive Dynamics:** Larger, well-funded platforms are capturing market share, making it difficult for smaller providers to compete on features, reliability, and pricing.
- **Regulatory Requirements:** Increasing requirements around data security (ISO 27001), payment processing (PCI-DSS), and interoperability are raising the bar for market participation.

What This Means for CPOs

If your current CPMS provider is struggling, showing signs of financial distress, or has announced they're shutting down, you're not alone. Hundreds of CPOs are facing similar situations. The good news is that modern migration methodologies can minimize disruption—if you choose the right partner.

The True Cost of CPMS Migration

Before evaluating partners, it's essential to understand what's actually at stake in a migration.

Direct Costs

- **Migration Fees:** Some providers charge setup fees, data migration fees, or professional services costs.
- **Contract Terms:** You may need to commit to longer-term contracts to justify migration investment on the provider's side.
- **Training and Change Management:** Your team will need training on the new platform.
- **Integration Work:** API connections to third-party systems may need to be rebuilt.

Hidden Costs

- **Downtime Revenue Loss:** Every hour your chargers are offline is lost revenue. For a medium-sized CPO, this can mean thousands in lost income per day.
- **Support Overhead:** Migrations typically generate 3-5x normal support ticket volume as users and operations teams encounter issues.
- **User Attrition:** Extended outages or poor user experience during migration can drive users to competitor networks.
- **Opportunity Cost:** Time spent managing a troubled migration is time not spent growing your business.
- **Data Loss:** Incomplete migration can mean lost historical analytics, customer data, or billing records.

The Migration ROI Equation

A good migration partner should be able to demonstrate that despite upfront costs, you'll achieve positive ROI within 6-12 months through improved reliability, better features, lower operational costs, or increased revenue.

Core Evaluation Criteria

1. Technical Competence and Platform Maturity

OCPP Protocol Support

Your potential partner must support the OCPP versions your chargers use. Key questions to consider:

- Do they support both OCPP 1.6J and 2.0.1?
- Have they handled migrations from mixed OCPP environments?
- Can they work with chargers that have vendor-specific OCPP implementations?
- Are they certified by the Open Charge Alliance, or can they demonstrate compliance?

■ Red Flag

A provider that only supports one OCPP version or hasn't successfully migrated from your specific existing platform.

✓ Green Flag

Detailed technical documentation on OCPP compatibility, including specific charger models they've worked with successfully.

Platform Architecture and Scalability

- What's their cloud infrastructure? (AWS, Azure, GCP, or self-hosted)
- What's their historical uptime? (Look for 99.5%+ SLA)
- How do they handle load spikes? (Important for peak usage times)
- What's their disaster recovery and backup strategy?

■ Red Flag

Vague answers about infrastructure, no published uptime statistics, or a history of significant outages.

✓ **Green Flag**

Transparent uptime reporting, redundant infrastructure across multiple availability zones, automated failover capabilities.

Integration Capabilities

- What payment gateways do they support? • Can they integrate with your existing fleet management, energy management, or billing systems?
- Do they provide well-documented APIs?
- What's their approach to custom integrations?

■ Red Flag

Limited integration options or a 'we'll figure it out' attitude toward your specific integration needs.

✓ Green Flag

Pre-built integrations with major systems in your tech stack, comprehensive API documentation, examples of similar integrations they've completed.

2. Migration Methodology and Experience

Proven Migration Process

A reliable partner should have a documented, repeatable migration process. Look for:

- **Structured Phases:** Clear stages from assessment through completion
- **Risk Mitigation:** Strategies to minimize downtime and data loss
- **Testing Protocols:** How they validate before full deployment
- **Rollback Capabilities:** What happens if something goes wrong?

■ Red Flag

'We'll figure it out as we go' or treating your migration as an experiment. No documented process or case studies.

✓ Green Flag

Detailed migration playbook, customer references from similar migrations, demonstrated experience with your scale of operation.

Pilot and Phased Migration Approach

The best migration partners don't attempt 'big bang' migrations. Instead, they use phased approaches:

- **Pilot Phase:** Migrate a small subset to validate the process
- **Segmented Rollout:** Progressive migration of charger groups
- **Validation Checkpoints:** Go/no-go decisions at each stage
- **Incremental Risk:** Never putting all chargers at risk simultaneously

■ Red Flag

Insistence on migrating everything at once, or lack of pilot testing methodology.

✓ Green Flag

Mandatory pilot phase, segmented migration plan customized to your infrastructure, clear validation criteria at each stage.

3. Business Stability and Viability

You're considering migration precisely because a provider failed. How do you ensure your new partner won't face the same fate?

Financial Health Indicators

While you may not get full financial disclosure, look for signals:

- How long have they been in business?
- Who are their investors, and when was their last funding round?
- What's their customer count and growth trajectory?
- Are they profitable, or do they have a clear path to profitability?

■ Red Flag

Very young company with limited funding, unclear business model, or aggressive pricing that seems unsustainable.

✓ **Green Flag**

Established track record (3+ years), stable funding, growing customer base, realistic pricing that suggests business sustainability.

4. Data Security and Compliance

Given increasing regulatory requirements and the sensitive nature of charging data, security is paramount.

Security Certifications

- Do they have ISO 27001 certification or are they pursuing it?
- Are they PCI-DSS compliant (if handling payments)?
- Do they conduct regular security audits and penetration testing?
- What's their incident response process?

■ Red Flag

No security certifications, vague answers about security practices, no documented incident response plan.

✓ Green Flag

Current ISO 27001 certification, regular third-party security audits, transparent security documentation, clear incident response protocols.

Cybersecurity for Charging Infrastructure

Charging infrastructure is increasingly targeted by cybersecurity threats. Your CPMS partner should:

- Implement strong authentication and access controls
- Use encrypted communications (TLS 1.2+) for all OCPP connections
- Provide security monitoring and anomaly detection
- Support features like firmware signature verification

5. Support and Customer Success

The quality of ongoing support can make or break your operational experience.

Support Structure

- What support tiers are available?
- What are response time SLAs for different issue severities?
- Do they provide 24/7 support for critical issues?
- What channels are available? (Phone, email, chat, ticketing system)

■ Red Flag

Limited support hours, slow response times, no escalation path for critical issues, single-channel support.

✓ Green Flag

24/7 support for critical issues, clear SLAs, multiple support channels, dedicated account management.

Critical Questions to Ask Potential Partners

Migration Process Questions

1. "Walk me through your complete migration process from initial call to final cutover. How long does each phase typically take?"

This reveals whether they have a structured approach or are winging it.

2. "How many migrations have you completed from [your current provider]? Can you provide references?"

Specific experience with your current platform is invaluable.

3. "What's your approach to minimizing downtime during migration? What's the longest downtime any charger will experience?"

Should be hours, not days. If they can't commit to minimal downtime, be wary.

4. "What happens if something goes wrong during migration? Can you roll back? What's your rollback process?"

They should have a clear answer and contingency plans.

5. "What data will and won't be migrated? How far back does historical data go?"

Be explicit about data preservation requirements.

6. "How do you validate data integrity after migration?"

Should involve multiple validation stages, not just 'we'll check that it loaded.'

Technical Capability Questions

7. "What OCPP versions do you support, and have you worked with [specific charger models in your fleet]?"

Verify compatibility before investing time in the process.

8. "How do you handle chargers with custom firmware or vendor-specific OCPP implementations?"

Many chargers don't fully comply with OCPP standards.

9. "What's your platform uptime over the last 12 months? Can you provide documentation?"

Verify, don't just accept verbal assurances.

10. "What's your API rate limiting, and do you charge for API calls?"

Important if you have heavy integration needs.

Business and Commercial Questions

11. "What's your pricing structure, and are there any hidden fees I should know about?"

Understand total cost of ownership.

12. "What contract terms are you offering? Is there a minimum commitment period?"

Longer terms aren't necessarily bad if the provider is solid, but understand the commitment.

13. "What happens if you go out of business or shut down? Is there an escrow arrangement for source code or data?"

Given you're migrating because of a shutdown, this is a fair question.

14. "Can you provide financial references or information about your funding and business stability?"

Professional providers understand this concern.

Security and Compliance Questions

15. "What security certifications do you hold? Can you share your most recent security audit results?"

ISO 27001, PCI-DSS compliance reports, penetration test results.

16. "How do you handle data residency requirements? Where is my data stored?"

Critical for European operators or those with data sovereignty requirements.

17. "What's your incident response process if there's a security breach?"

Should have a documented, tested process.

Red Flags That Should Make You Walk Away

Absolute Deal-Breakers

1. No Customer References If a provider can't connect you with satisfied customers who've completed migrations, walk away. This is the single most important validation.

2. Unclear or Evasive About Technical Capabilities If they can't clearly explain how they'll handle your specific OCPP version, charger models, or integrations, they probably can't handle it.

3. No Documented Migration Process Treating your migration as an experiment is unacceptable. They should have a proven playbook.

4. Unwilling to Do a Pilot Migration If they insist on migrating everything at once without a pilot phase, the risk is too high.

5. Poor Financial Transparency If they're evasive about their business stability and you're already migrating because a provider failed, you're potentially repeating the mistake.

6. No Security Certifications In today's threat environment, this is non-negotiable.

7. Unrealistic Promises If it sounds too good to be true (instant migration, zero downtime with no pilot, incredibly low pricing), it probably is.

What Great Migration Partners Do Differently

Transparency from Day One

Exceptional partners are upfront about challenges, realistic about timelines, and honest about what they can and can't do. They don't over-promise.

Proactive Communication

You shouldn't have to chase them for updates. The best partners provide regular status reports, flag issues early, and maintain open communication channels.

Customised Approach

While they have a standard process, they tailor it to your specific needs rather than forcing you into a one-size-fits-all approach.

Investment in Your Success

Great partners view migration as the beginning of a relationship, not a transaction. They invest in understanding your business and helping you succeed long-term.

Technical Depth

When you ask technical questions, you get to talk with actual engineers who can answer specifically, not salespeople reading from marketing materials.

Migration Insurance

The best providers are so confident in their process that they'll offer guarantees—SLA commitments during migration, money-back provisions if certain milestones aren't met, or other risk-sharing arrangements.

Special Considerations for Different CPO Profiles

Small CPOs (10-50 Chargers)

Key Concerns: Cost sensitivity, limited technical resources, need for hands-on support

What to Prioritize:

- Simple, intuitive platform that doesn't require a full-time administrator
- Comprehensive migration support with minimal involvement needed from your side
- Clear, all-inclusive pricing with no surprise fees
- Responsive support since you can't afford long outages

Medium CPOs (50-500 Chargers)

Key Concerns: Balancing features with cost, growing complexity, integration needs

What to Prioritize:

- Scalability—can the platform grow with you?
- Integration capabilities with your existing tech stack
- Advanced features like dynamic pricing, load management, smart charging
- Solid support but not necessarily white-glove service

Large CPOs (500+ Chargers)

Key Concerns: Enterprise-grade reliability, advanced features, complex integrations, fleet management

What to Prioritize:

- Proven scalability and performance at your level
- Advanced features: sophisticated pricing engines, energy management, V2G support
- API robustness and rate limits that can handle your volume
- Dedicated account management and premium support
- Customization capabilities

Building Your Evaluation Scorecard

Create a weighted scorecard to objectively compare providers:

Evaluation Category	Weight	Score (1-10)	Weighted
Technical Capability	30%	—	—
OCPP protocol support		—	
Platform architecture & reliability		—	
Integration capabilities		—	
Migration Methodology	25%	—	—
Documented process		—	
Risk mitigation approach		—	
Migration experience & references		—	
Business Viability	20%	—	—
Financial stability		—	
Market position		—	
Long-term roadmap		—	
Security & Compliance	15%	—	—
Security certifications		—	
Data protection practices		—	
Support & Service	10%	—	—
Support quality & availability		—	
Documentation & training		—	
TOTAL	100%		—

The Decision Process: A Recommended Approach

Phase 1: Initial Research (Week 1-2)

- Identify 4-6 potential providers
- Review their websites, documentation, and public information
- Check reviews, forums, and industry reputation
- Eliminate obvious non-fits based on technical requirements

Phase 2: Initial Conversations (Week 3-4)

- Schedule discovery calls with remaining 3-4 providers
- Ask the critical questions from this whitepaper
- Request detailed proposals and pricing
- Verify technical compatibility with your infrastructure

Phase 3: Deep Evaluation (Week 5-6)

- Check references thoroughly—speak with 2-3 customers of each finalist
- Request technical demonstrations focused on your specific use cases
- Have your technical team evaluate platform capabilities
- Review contracts and terms in detail

Phase 4: Pilot Discussion (Week 7)

- With your top 1-2 choices, discuss pilot migration approach
- Understand exactly what the pilot will validate
- Clarify costs, timeline, and success criteria
- Assess comfort level with the team you'll be working with

Phase 5: Final Decision (Week 8)

- Compare complete scorecards
- Consider not just features but also cultural fit and partnership potential
- Negotiate final terms
- Make your selection

Important

Don't rush this process. Spending 2 months on proper selection is far better than realizing 3 months into a migration that you chose the wrong partner.

What to Include in Your Migration Contract

Essential Contract Elements

- **Scope of Work:** Exactly what will be migrated (data types, date ranges, configurations), what won't be migrated and why, timeline with milestones, responsibilities of each party.
- **Service Level Agreements:** Maximum downtime per charger during migration, response times for migration-related issues, platform uptime commitments post-migration.
- **Data Protection:** Data ownership clauses, data handling during migration, data retention and deletion policies, breach notification requirements.
- **Support Terms:** Enhanced support during migration period, post-migration support levels, escalation procedures, support availability.
- **Financial Terms:** Complete pricing (setup, migration, monthly fees, transaction fees), payment schedule, refund or remediation provisions if milestones aren't met.
- **Exit Provisions:** Data export capabilities, contract termination process, transition assistance if you later migrate elsewhere.
- **Liability and Warranties:** Liability caps and provisions, warranties about platform capabilities, indemnification clauses, insurance requirements.

Key Negotiation Points

- **Pilot success criteria:** Define what constitutes successful pilot completion before full migration
- **Performance guarantees:** SLA commitments with remedies if not met
- **Contract length:** Balance provider's need for commitment with your risk mitigation
- **Price adjustments:** Lock in pricing or understand escalation terms
- **Exit clauses:** Make sure you're not trapped if the relationship doesn't work

After Selection: Setting Up for Success

Pre-Migration Preparation

Even with the right partner, your preparation matters:

- **Internal Alignment:** Ensure all stakeholders understand the migration plan, identify decision-makers for key migration decisions, set clear internal success criteria.
- **User Communication Planning:** Develop communication plan for your EV drivers, prepare for potential support volume increase, set up feedback channels.
- **Technical Preparation:** Document all current integrations and dependencies, gather credentials and access needed, ensure you have backup data from current provider.
- **Operational Readiness:** Clear calendars for key personnel during cutover windows, establish internal communication protocols, plan for potential rollback scenarios.

Post-Migration Optimization

Week 1-2: Intensive Monitoring

Watch for patterns in errors or user complaints, verify all integrations are functioning correctly, address any performance issues immediately.

Month 1: Stabilization

Continue enhanced monitoring, gather user feedback systematically, fine-tune configurations based on real-world usage.

Month 2-3: Optimization

Review analytics and performance data, identify opportunities for improvement, transition to normal operational mode.

Conclusion: Migration as Strategic Opportunity

While the circumstances forcing your migration may be unfortunate, the process presents a genuine opportunity to improve your operations. The right CPMS partner isn't just a replacement for your old provider—they should be a strategic enabler helping you:

- **Improve reliability** with better platform architecture and support
- **Reduce costs** through more efficient operations and competitive pricing
- **Add capabilities** that weren't available in your old platform
- **Scale effectively** as your network grows
- **Stay current** with evolving industry standards and regulations

The key is approaching partner selection with appropriate rigor. Use this whitepaper as your guide, but also trust your instincts. The best partnerships are built on mutual respect, clear communication, and aligned incentives.

Final Thought

Remember: This decision will impact your business for years. The hours you invest in proper evaluation now will pay dividends in operational reliability, customer satisfaction, and business growth.

Appendix: Migration Checklist

Use this as your working checklist during the evaluation and migration process:

Pre-Selection Phase

- Document all current infrastructure (charger models, OCPP versions, locations)
- List all integrations and dependencies
- Identify essential features and capabilities
- Determine budget parameters
- Assemble evaluation team
- Create weighted scorecard based on priorities

Provider Evaluation Phase

- Initial discovery call completed (for each provider)
- Technical capability verified
- OCPP compatibility confirmed
- Migration methodology documented
- Customer references checked (minimum 2)
- Security certifications verified
- Financial stability assessed
- Contract terms reviewed
- Pricing fully understood (including hidden fees)
- Scorecard completed

Selection and Contracting Phase

- Final provider selected
- Contract negotiated and reviewed by legal
- Data protection and security terms verified
- SLAs clearly defined
- Exit provisions acceptable
- Contract signed

Migration Execution Phase

- Kickoff meeting completed
- Project plan and timeline agreed
- Data export from current provider initiated
- Pilot chargers selected
- Pilot migration completed successfully
- Pilot performance validated
- Full migration schedule approved
- All charger groups migrated
- Post-migration validation completed

Post-Migration Phase

- All chargers verified operational
- All integrations functioning
- User feedback collected
- Performance baseline established
- Training completed for operations team
- 30-day post-migration review conducted
- 90-day optimization review conducted