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- People Moves
- Sectors & Insights
- Lessons in Building a Plural Career



Market Review

Renewables and Cleantech Talent Trends Q2 2025



Cleantech-first insight. For the teams building the future.

At Hyperion Search, we work exclusively within climate, cleantech, and renewable energy from next-gen solar and energy storage to grid infrastructure and EV and future mobility.

We know the talent market because we're in it every day - partnering with founders, investors and scaling companies by finding and building the teams driving the energy transition.

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Hyperion Talent Intelligence empowers clients with a suite of offerings:

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- Organisational design for scale
- Compensation & equity benchmarking
- Talent pipelining & succession planning
- Competitor talent mapping & analysis
- Strategic hiring roadmaps

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You can also follow us at **hyperion-search-ltd**

Events

Events we attended in Q2:

Solar & Storage Live

Utility Week Live

ECO Summit

Catch us in Q3 at:

Battery Cells & Systems Expo
July

Intercharge Network Conference
September

Solar & Storage Live UK
September

About Hyperion

Hyperion is a specialised global search firm dedicated exclusively to the clean technology and renewable energy sectors.

Hyperion exists to deliver genuine impact for our clients, candidates and the planet.

Since our founding in 2014, we have partnered with a diverse range of organisations, from venture capital-backed start-ups to established global corporates, placing senior and strategically vital talent across solar, energy storage & grids, and e-mobility markets in both EMEA and the US.

With deep sector expertise, we identify, assess, and attract individuals and teams with the specialised skills, experience, and vision required to drive innovation, navigate industry challenges, and seize opportunities in the clean energy transition.

We understand that what we do matters. By fostering long-term partnerships, providing honest advice, and delivering truly valuable talent, we help build the businesses leading the charge in cleantech and renewable energy.

Now, as part of HC Group - a global leader in energy and commodities executive search - Hyperion benefits from enhanced market intelligence, expanded networks, and a more powerful global platform. This strengthens our ability to connect the right talent with the right opportunities, while retaining our exclusive cleantech focus. With HC Group's reach and resources behind us, we are better positioned than ever to support the organisations shaping the future of sustainable energy and mobility.

Sectors & Functions

Sectors

Energy Storage & Grid

EV & Future Mobility

SmartCities

Solar

CleanTech

Functions

Executive (Board and C-Suite)

Manufacturing /Engineering

HR and People

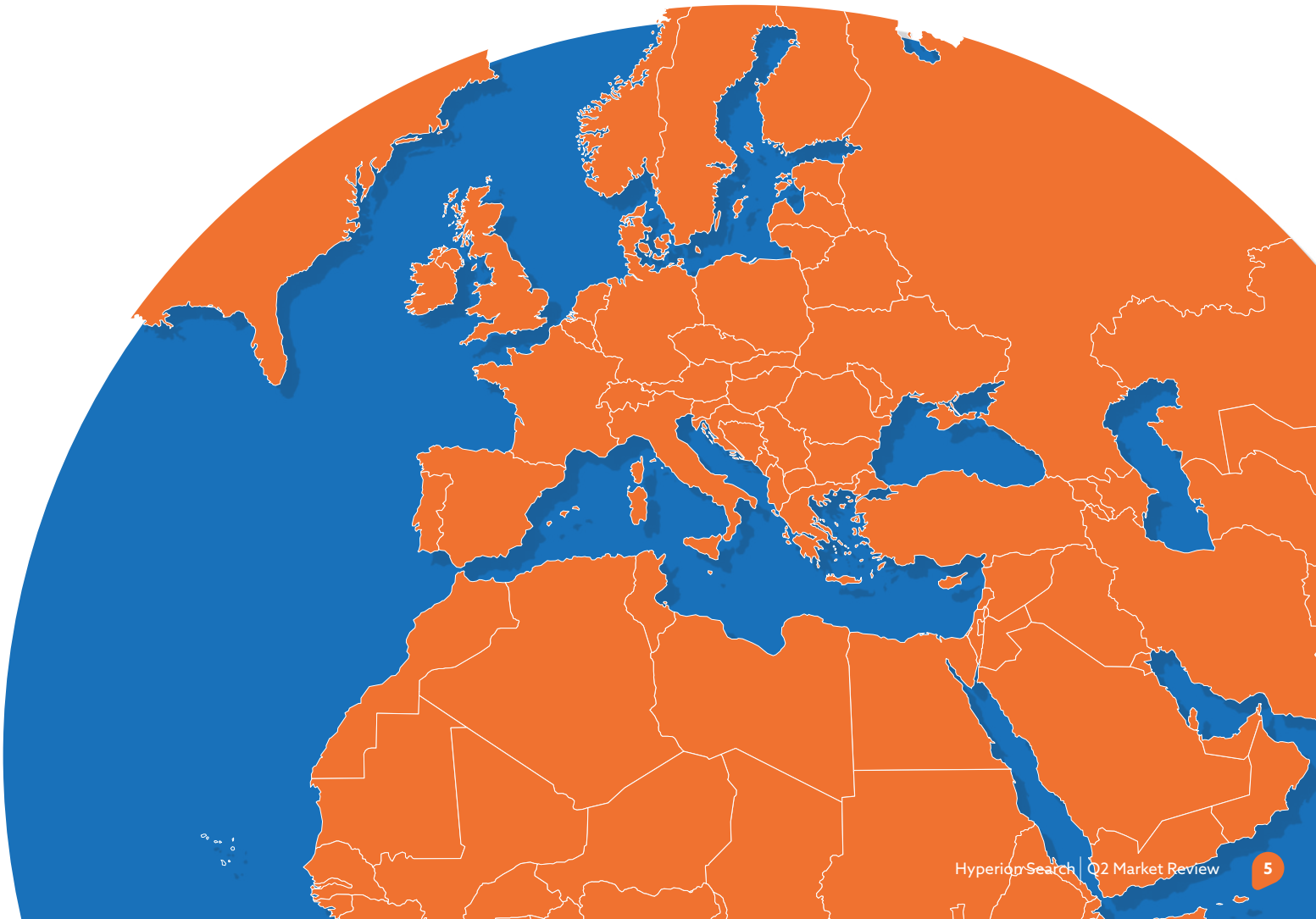
Commercial and Sales

Operations

Finance

Sustainability

Our Global Reach





Lessons from Q2 – Momentum is a Strategy

The clock is ticking - for our climate, for the energy transition, and for the companies building the future.

In Q2 2025, time has become a central theme: not just in terms of planetary urgency, but also in how organisations respond to shifting markets, policy volatility, and growing talent demands.

While the U.S. cleantech market has stumbled, hit by market jitters and threats to core green subsidies, EMEA has leaned in. European investment, policy, and innovation continue to forge ahead, even as macroeconomic headwinds persist. The EU's Clean Industrial Deal and Industrial Decarbonisation Accelerator are beginning to reshape supply chains and attract inward capital, particularly across battery manufacturing, solar, and grid flexibility. The message is clear: Europe is serious about scale, but can it escape the shadow of Northvolt?

Yet despite progress, the path is not smooth. Project bottlenecks, financing uncertainty, and geopolitical complexity are pressing in from all sides. But this is precisely where leadership counts.

Because in markets like these, talent doesn't get easier to find - it gets harder. There may be fewer open roles overall, but the race for the very best people is fiercer than ever. And we've seen it firsthand: great candidates are being lost - not to competitors with deeper pockets, but to those with faster clocks. Delayed decisions, drawn-out processes, and lack of clarity are costing companies dearly.

In Q2, we saw continued demand for strategic hires across Europe in energy storage, BESS, solar development, and EV infrastructure. Growth-focused scaleups, VC/PE-backed innovators, and corporates in transition are all looking for leaders who can deliver under pressure, and they're not sitting still.

Time, then, is your most precious currency. The organisations moving with conviction and pace are the ones winning top talent, building culture, and staying ahead of the curve. Because in the toughest of times, it's not just about keeping the bus moving - it's about making sure the right people are on board.

That's the paradox of this moment: hiring activity may be quieter, but it's more consequential. Every decision counts more. Every hire is magnified. The margin between average and outstanding leadership becomes the margin between growth and stagnation.

At Hyperion Search, we've spent more than a decade partnering with cleantech companies to navigate uncertain terrain and hire with precision. As Q3 begins, the question for leadership teams is no longer whether to act - but how quickly.

The clock is ticking. Are you moving with it?



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Energy Storage and Grid

In Q2, we saw a continual rise in European BESS capacities, especially at Utility-scale. Tariffs and tax subsidy changes have driven uncertainty in the US, leading to difficulties for several battery companies, but opportunities in EMEA. Europe has also seen major market and regulatory reforms announced, aimed at reducing barriers to entry.

Key Trends:

- Utility scale BESS continues to rise in Europe, with healthy markets across Germany, Benelux, CEE and Balkans.
- The trade tariffs and US tax credit shifts impacted battery companies, with uncertainty leading to project delays and unfortunate casualties - LiCycle and Powin filing for bankruptcy and AESI exiting their battery business.
- UK's TM04+ grid reforms announced, shifting from a 'first come, first served' connection process to 'first ready, first needed, first served'. Important move to remove "zombie projects" from the queue and potentially free up 50GW grid capacity.
- April's Iberian blackout highlighted the vital role of energy storage for grid stability. Even with high renewables, a lack of fast-response storage, limited interconnection, and offline dispatchable power meant the grid couldn't cope with rapid frequency deviations, leading to its failure.
- The UK approved 6GWh of grid-scale BESS in May, reaching a total of 120GWh approved. Italy reached 1GW capacity online, driven mainly by the capacity market.
- Policy & Regulatory Progress. Spain committed €700M to support schemes for storage; the UK Cap & Floor Scheme progressed; and Germany initiates early stages of Network Tariffs and Synthetic Inertia market reforms.
- New all-in-one liquid cooled BESS solutions were showcased by the likes of Trina and Sunwoda as well as diversification of new LDES (LAES, Flow Batteries)
- BESS harmonisation in Europe (both Wholesale and Ancillary via PICASSO – 3 Baltic states joined in April and Italy set to re-join) and co-location opportunities with growing interest in renewables + BESS projects, especially retrofitting with existing live connected assets.

Key Q2 Deals:

- **Terralayr – World's first "virtual" tolling deals with RWE and Vattenfall**
- **TotalEnergies finalises VSB Group acquisition**
- **AMPYR Distributed Energy (ADE) acquires Eden Sustainable**
- **Voltwise acquires the SMS BESS division with almost 2GW pipeline, including 460 MW of BESS in operation or under construction**
- **Foresight Group LLC to acquire Harmony Energy Income Trust (HEIT) for $278M**
- **German BESS company Voltfang €15M Series B close**
- **Socomec acquires French battery analytics startup, PowerUp (Hyperion client)**
- **Eku Energy acquires Bluestone's 1GW/2GWh UK BESS portfolio**



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Talent Trends

Here are Q2's key in-demand talent areas in Energy Storage and Grid.

- **Strategy / Market Leads:** Experts on the evolving ESS revenue markets (both local and regional)
- **Asset Managers:** Those who can help steer storage assets to optimal returns and performance
- **Sales (C&I & Grid-scale BESS):** Those who can hunt new business and build healthy project pipelines in a competitive landscape
- **Grid Specialists:** A constant need - those who can help overcome grid connection barriers through expertise and network with system operators

People Moves

Andy Hadland has joined BW ESS in Australia as Executive Director. He was previously at Eku Energy.

Chris Voet has joined iwell in The Netherlands as CCO. He was previously at SolarEdge.

Danny Zaitsev has joined BattMan Energy in Norway as Director of Energy Markets & Business Development. He was previously at Hafslund.

Leon Pulman has joined Allye in the UK as Director of Business Development. He was previously in a similar role at Wattstor.

Jinho Huh has joined Nidec Conversion in Germany as Director of Business Development. He was previously ESS Director at LUX Automation.

Javier Arrue has joined BW ESS in the UK as Investment Director. He was previously Head of Project Management & Construction at Cubico Sustainable Investments.

Andreas Gronarz has joined Shenzhen Infypower Co Ltd in Germany as EMEA Business Development Director BESS. He was previously Head of Residential/ Home at Pixii Germany.

Mark Duxbury has joined iwell in the UK as UK Country Director, he was previously Head of Sales at Ista UK.

Mike O'Kronley has joined NOVONIX in the USA as CEO. He was previously in a similar role at Ascend Elements.

Jörn Jürgens has joined PRAMAC in Germany as Director Sales International C&I BESS. He was previously Director of Sales Power Electronics EMEA at Canadian Solar.

Jan Lengerke has joined Luxera Energy in Germany as Head of Partnerships. He was previously Global Head of Energy at Tado.

Emma Nehrenheim has joined European Battery Alliance (EBA) in Sweden as Managing Director. She was previously Chief Environmental Officer at Northvolt.

Mark Walton-Hayfield has joined e-STORAGE (Canadian Solar) in the UK as Managing Director UK. He was previously at Envision Energy.



EV & Future Mobility

Q2 has seen varied but continued progress in the mobility transition, with a strong emphasis on electrifying and decarbonising Europe's trucks, buses, and HGVs. As passenger EV adoption thrives, the focus shifts to how commercial fleets and logistics can lead the charge toward net zero, despite facing unique challenges and opportunities in this heavier vehicle segment.

Key Market News/Trends

- **UK BEV Sales Soar -** UK Battery Electric Vehicle (BEV) registrations jumped 28% in May 2025, reaching a 21% year-to-date market share. Electric van sales notably surged 41%.
- **EV Charing Investment boost -** The UK government announced plans to invest £2.6 billion in transport decarbonisation, with £1.4 billion for EV uptake (including vans/HGVs) and £400 million for charging infrastructure. As we reached the 80,000 public charge point milestone, the Government aims to deliver an additional 100,000 public charge points by 2030.
- **UK Zero-Emission Truck & Bus Sales continue to surge -** Zero-emission truck registrations in the UK jumped 94% in Q1 2025, reaching a record 1% market share. The zero-emission bus sector saw a massive 129.5% uptake, making the UK Europe's largest market for new ZEV buses.
- **On-going Development of Europe's Megawatt Charging System (MCS):** Significant strides are being made in developing Europe's Megawatt Charging Systems (MCS) for heavy-duty vehicles. Q2 saw the announcement of a €10 million initiative dubbed "Macbeth" involving 19 European companies and research centers, aiming to establish a European charging network for electric trucks by 2030. BYD also announced its plans to build an MCS network in Europe within the next 12 months.
- **Dedicated Truck Charging Hubs Expanding:** Companies like Milence are rapidly expanding their truck charging hub networks across Europe, whilst the likes of Aegis Energy ramp up plans to deliver its network of 30 clean, multi-energy refuelling hubs that will offer a combination of electric charging, HVO, hydrogen, and bio-CNG.
- **Policy & Regulatory Influence:** The EU's increasingly stringent CO2 emissions reduction targets, culminating in a 90% CO2 emissions reduction for heavy-duty vehicles from 2040 onwards, and the requirement for all new urban buses to be zero-emission from 2035, are major drivers for the transition. UK government also removed planning permission requirements for home and business EV charger installations, aiming to drive up further EV adoption.

Talent Trends

The rapid shift of commercial vehicles away from fossil fuels is generating significant demand for specialised talent across the sector:

- **Fleet Transformation (Electrification & Decarbonisation) Specialists:** Experts in network modelling and operational analysis who can help commercial fleet managers identify viable electric routes and optimise charging strategies to minimise grid upgrade costs are high in demand.
- **Heavy-Duty Charging Infrastructure Specialists:** Grid Connection Specialists and Project Managers with technical expertise in designing, deploying, and maintaining high-power charging solutions, specifically for commercial vehicle depots and public hubs remain in constant demand.
- **Commercial Architects:** Sales and Business Development professionals who can drive uptake of electric trucks, buses, and associated charging solutions by demonstrating compelling TCO models and navigating complex fleet procurement processes continue to be sought after.
- **Policy & Regulatory Affairs:** We are seeing an increasing need for specialists who understand the evolving landscape of emissions regulations, incentives, and infrastructure mandates for heavy-duty vehicles across European



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People Moves

Philippe Hausser has joined Ohme in Germany as Co-Head of Sales DACH. He was previously Managing Director at myenergi.

Giles Desforges has joined Energy Park in the UK as CEO. He was previously CCO at JLA Group.

Nathan Fearnhead has joined Gridserve in the UK as Head of Service Delivery. He was previously Technology & Services Director at SWARCO.

Mark Gallagher has joined Andersen EV in the UK as Head of Sales. He was previously Senior Partnerships Manager – EV at Centrica.

Mark Sowter has joined RAW Charging in the UK as Network Development and Delivery Director. He was previously Head of Construction – EV at Sainsbury's.

Sander Ouwerkerk has joined Eco-Movement in Amsterdam as COO. He was previously Chief Electrification Sales at B-ON.

Paul Barringer has joined Sungrow Power Supply Co in the UK as Head of EVC – UK & Ireland. He was previously UK Sales Manager – E-mobility at Gewiss.

Christian Zeh as joined Allego in Germany as COO. He was previously MD at PEAKPLAN.

Conor Charnley has joined Connekt EV Charging in the UK as Commercial Director. He was previously Business Development Manager at Cleaner Group.

Rouven Besters has joined Last Mile Solutions in the Netherlands as CCO. He was previously CEO at Red Kubes.

Jean Gadrat has joined Allego in the Netherlands as CMO. He was previously Managing Director at Meridiam.

Alice Aprile-Smith MBA has joined Source – EV in the UK as Head of Partnerships and Business Development. She was previously Managing Director – Home Energy | Product & Commercial Strategy at Rendesco.



Solar

Europe delivered record solar output and strengthened its clean energy trajectory, supported by regulatory shifts favouring ethical sourcing and innovation. But these achievements are tempered by grid fragility, market instability, and fierce global competition. Sustainable growth through 2030 will rely heavily on ramping up investments in transmission, storage, and flexible power systems—alongside clear, long-term rules to support resilient domestic manufacturing and market confidence.

Solar generation surged over **30% year-over-year in Q1**, reaching nearly 68 TWh-contributing **8.2% of electricity in March** versus **6% in 2024**. Nations like Germany, Spain, the Netherlands, UK and Poland all posted strong gains.

The EU is projected to add around **70 GW of solar capacity in 2025** - a jump from 65.5 GW in 2024 - **marking a 7% increase.**

Europe's solar buyers are showing **increased optimism** for the sector, in spite of fluctuations in module prices across technologies.

Innovation and efficiency gains - **Q2 saw progress in advanced manufacturing technologies** like N-type high-efficiency cells (650–800 Wp) and AI-driven trackers and robotics, enhancing yields and cutting installation costs.

Grid strain and curtailment - Aging infrastructure, lack of inertia, and insufficient storage—led to solar farm disconnections in April. Continent-wide power curtailment ranged from 10–30% in places like the UK, France, Northern Ireland, and Germany.

Market economics and volatility - Wholesales prices frequently went negative during peak solar periods, undermining revenue potential. Investors fear thin margins amid unpredictable PPA pricing and interest rates.

Talent Trends

- **Localised hiring trends,** with professionals more inclined to remain regionally, reducing cross border mobility, requiring talent development within local markets.
- **Senior leadership saw targeted hiring** surges in grid integration, storage, and large-scale project development, driven by rapid capacity expansion and regulatory complexity.
- **Demand spiked for executives with cross-sector skills**—particularly in PPA structuring, regulatory navigation, and corporate finance. Additionally, senior roles increasingly required change-management expertise to align legacy teams with automation and advanced PV tech rollouts. As a result, executive compensation rose notably, alongside expansion of specialised recruitment services and board-level diversity initiatives.



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People Moves

Matthias Holzer has joined KACO New Energy in Germany as Head of Sales Europe. He was previously Account Manager at PVO International.

Massimo Poli has joined meteocontrol in Italy as Regional Manager EU South. He was previously Head of M&A at Sungrow.

Thomas Dorsch has joined Schletter Group in Germany as Global Director Sales Ground Mount. He was previously in a similar position at SENS – Iqony Solar Energy Solutions.

Marco Oesterlein has joined Solar-Log in Germany as Managing Director/ Chief Product Officer. He was previously Business Development Executive IoT at adesso SE.

Matías Baigorría Heise has joined PerPetum Energy in Germany as Managing Director. He was previously Director Onshore Wind at EDF Renewables.

Carl Hogg has joined Good Energy Services in the UK as Managing Director. He was previously Service Director, Building Technology and Solutions at Johnson Controls.

Warren Davoile has joined eEnergy in the UK as CCO. He was previously in a similar role at Energy Efficient Solutions Group.

Richard Lothholz has joined Enstall in Germany as CCO. He was previously Chief Sales Officer at Schletter Group.

Thomas Herold has joined SOFAR in Germany as Vice President Technical Europe. He was previously Director of Service & Operations at Huawei.

David Garmendia has joined LONGi Solar in Spain as CTO Utility Europe. He was previously Head of Products & Solutions at Trina Solar.

Michiel Vanhoutte has joined ENVIRIA in Germany as COO. He was previously in a similar position at Goldbeck Solar.

Fabian Herr has joined Greencells Group in Germany as CEO. He was previously COO at Iqony Sens – Iqony Sustainable Energy Solutions.

BoardSearch



Building boards that scale with purpose

Hyperion Board Search is a dedicated division of Hyperion Search, founded by David Hunt - a recognised leader in the cleantech sector with over 30 years of executive search and business leadership experience. Our Board Search team specialise in appointing Non-Executive Chairs and Directors to high-growth cleantech and energy transition businesses.

From first-time founders to PE-backed scale-ups, we help clients build high-impact boards aligned with their next stage of growth.

What we offer

- Non-Executive Director Appointments
- Non-Executive Chair Appointments
- Board Structure & Advisory Support
- Compensation Benchmarking & Framework Design

Why Hyperion?

- Sector specialisation - we operate exclusively in the clean technology and renewable energy sectors
- Global search capability – 17+ countries and counting
- Personally led by David Hunt, industry expert & strategic advisor
- Trusted by VCs, founders, and investors across EMEA and North America
- Proven record placing Chairs and NEDs in high-growth businesses

Who we work with

- VC & PE-backed cleantech companies
- Founders and CEOs scaling their boards
- Investors seeking to strengthen portfolio governance
- Mature businesses evolving their leadership

Hyperion Board Search is committed to supporting the clean energy transition by connecting transformative companies with visionary leaders.

Connect with us today

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From CEO to Chair:
Lessons in Building a Plural Career

As more cleantech leaders reach the next phase of their careers, many are exploring what a plural career - one that includes board, advisory, and non-exec roles - could look like. For my *Leaders in Cleantech* podcast I recently sat down with Monica Collings OBE, former CEO turned Chair, about her own transition and the lessons she's learned along the way.

Monica's move into the boardroom didn't come from chasing titles, but from gradually evolving her impact: mentoring, advising, then formally joining boards. As she put it, "I didn't start with a grand plan to build a plural career - I followed opportunities where I could add value beyond the day-to-day."

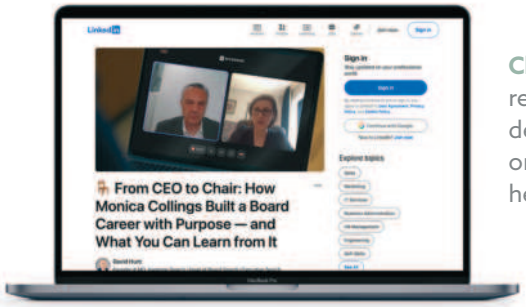
> **One key lesson? The shift from doing to guiding. Board roles, Monica notes, are about creating the space for executives to succeed - not taking the wheel. This distinction is especially critical in cleantech, where founders often need support navigating unfamiliar commercial and governance waters.**

She also stresses the importance of diversity in perspective, not just demographics: mixing deep sector expertise with fresh thinking to support high-growth companies in a rapidly evolving landscape. For scale-ups and growth-stage businesses, investing in a strong board isn't just a governance box-tick - it's a competitive advantage. And for executives thinking about their next chapter, Monica's story is a reminder that plural careers are built with intention, curiosity, and the desire to help others grow.

If you're a senior executive contemplating a transition into plural roles - or an investor or founder seeking board-level firepower - there's never been a better time. The cleantech sector needs wise, inclusive, operationally-minded leaders who can guide companies through uncertainty and opportunity alike. **Take a leaf from Monica's book: be intentional, be curious, and remember - your second career might just be your most impactful yet.**

Click Here to listen to Monica's full Leaders in Cleantech episode.





Click Here to read more in depth thoughts on the episode here.



ECO SUMMIT

Berlin 2025: Sunshine, Substance, and Smart Green Startups

This year was the 15th EcoSummit, and it marked my eighth; it remains one of the most energising events on the cleantech calendar. Over the years I have had the pleasure of speaking, moderating, and co-hosting at the event - each time leaving inspired by the people and progress this community represents.



While the Berlin sunshine was a little more reserved this year, the energy on stage and in the networking breaks more than made up for it. From the Solar Cruise the evening before, to the closing conversations over pretzels and espresso, EcoSummit once again brought together the best and brightest of Europe's cleantech ecosystem.

Startups pitched with purpose. VCs and CVCs listened with intent, coffee's were had and I expect deals were done, or at least initiated. It was a reminder that, despite headwinds in the market, the mission remains urgent and the momentum is real.

Many of Hyperion's clients and VC partners have graced the EcoSummit stage over the years—raising capital, sharing hard-won lessons, and then partnering with us to build the leadership teams that help them scale across Europe and beyond. That continuity and collaboration is part of what makes this event feel so grounded.

After two packed days of ideas and interaction, I had a final moment of quiet reflection with a favourite Berlin tradition of mine, a double espresso at the Einstein coffee-shop, looking out over the Spree.

The cleantech journey is not an easy one, but being surrounded by this level of vision and talent gives plenty of reason for optimism.Huge thanks, as always, to Jan and the EcoSummit team for creating the space where this ecosystem continues to grow and thrive. **Here's to the next 15.**

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