

REA Electric Vehicles Forum – EV Charging Roaming Working Group

Meeting Notes and Actions

3rd September 2020, 10am-12pm

Attendees

Chair: Clive Southwell

Attendees: Clive Southwell, Dan Pezin, David Hytch, Harry Bleasdale, James Fairchild, James Hitchman, Jingjing MA, Keith Brown, Linda Grave, Melanie Cao, Michael Scholtes, Miles Gillespie, Patrick Reich, Stuart Tolley, Tony Shorthouse, Scott Edy

REA: Daniel Brown, Frank Gordon, Isobel Morris

Summary

- REA EV Forum members discussed the proposed draft text to Government on roaming (slides and agenda available [here](#))
- Members broadly supported Option 2 (CPOs publish a public roaming tariff)
- Concerns about how will legacy infrastructure (and CPOs operating such infrastructure) adapt / be upgraded
 - **Action** – members who have solutions to upgrading legacy infrastructure please contact Daniel Brown
- Some concern as well about the cost split between eMSPs and CPOs for advancing this policy
- Proposals during meeting for REA become more assertive in requesting the government to mandate 'open protocols' (but not explicitly mention specific ones).
- **Actions:**
 - REA to think about if being a member of a roaming hub would satisfy this regulation
 - REA to develop roadmap for roaming with members
 - Members to feed in thoughts on upgrading legacy infrastructure
 - Members to feed in clear views about implementability of Option 2, including on costs to CPOs/eMSPs

Notes from meeting

All round introductions of Chair, REA and attendees.

Meeting Chair: run through of REA's position on roaming, response to the consultation, overview of the new draft position, closing with a discussion.

REA: housekeeping and competition law, notification of REA board elections and annual survey.

REA Presentation: Roaming is a moving market but still has a long way to go. Growing ministerial and govt frustration with the lack of roaming. REA membership push has provided counterbalance to anti-roaming narratives. Roaming is on radar of EV Energy Taskforce as a key industry deliverable. Increasingly high pressure area for govt. Consultation will be launched in December 2020 on the consumer experience of charging which will include language on roaming. So far REA has said this needs to be an industry-led initiative. But now the govt are saying they want to consult on this, and are carefully listening. REA/REAL also now launching the UK ID registration organisation to support roaming via OCPI ([EV Roam](#)).

REA's position on roaming currently: roaming is essential to encourage the mass uptake of EVs. Our position so far is that roaming should be industry-led but this needs to be reflected on now that the government wants to consult on the topic. REA don't believe that contactless is the same as roaming, and don't believe it provides same solution, but welcome more contactless. Roaming should ultimately deliver a superior customer experience, including for the public and for fleet operators.

4 options presented to members – 2 preferred and 2 discounted.

Option 1 – all chargepoint operators required to allow more than one Emisp with UK customers to access charge points. Option 2 – Govt requires all public chargepoint operators to publish a public roaming tariff (see draft paper for details).

Comment on Option 1 - downside is how do you control who the eMSPs are and how do you govern the operators in deciding how many people and whom the CPOs allow.

Comment on option 3 – The idea of having 1/10 chargers added to each network is completely untenable. The second eMSP again (option 1), drivers have got to find not only a vacant chargepoint but also determine whether they can or cant use what they've got in their wallet. Surely the industry's interest is to make it as easy as possible for the driver. Noted experience of smart ticketing in public transport.

Comments – agree with driver frustrations.

REA – we're in favour of coming to common standards but we wouldn't prescribe one particular one. Most members however have begun to move to (or already adopted) OCPI. We would note that data sharing regulations between CPOs and eMSPs to be proposed by OLEV. We don't want to bake in one particular protocol as we don't know what landscape will be like 10 years from now and difficult to undo regs.

Comment – most REA members support open network roaming and interoperability. Although we have support of APPG and Matt Western MP, there are some key players who are not very on board with this. And need to bring them on board.

REA – What do people think of Option 2?

Comment – question about price setting

REA – on option 2, the roaming tariff would be the baseline minimum a CPO would be willing to pay. You should be able to set the maximum price at a reasonable level. We need to be careful of forcing CPOs to take prices that are below of what is comfortable with them. They need to be able to set prices at level acceptable to them.

Question- what is definition/intention of published prices on Option 2?

REA – an entity (Gov or Industry Body) will need to hold centralised list of roaming prices. Published prices is that maximum price charged on a network for Ad Hoc access, and the minimum a CPO would be willing to take. This system would not exclude alliances and more direct deals between CPOs / eMSPs at other prices.

Comment – Users will only use a range of different apps if it is cheaper for them overall.. surely if there is a price of 30p per kw and the roaming agreement price is 35p, surely in reality most users would go for the cheaper option even if it involved applying for a different app or card. People will go to efforts to find a free or cheap charge.

Discussion on this comment.

Comment – part of the object of the exercise is looking at where market is going. People taking up EVs fastest right now is the fleet market. They are used to having fuel card they provide to each of their drivers and they get a bill back each month. They don't want to have to provide their drivers with multiple ones.

Comment – our CPO has agreed roaming partnership with a fleet.

Comment – with fuel cards though you can't go to every fuel station. Maybe alliances will naturally build up?

Comment – yes, that's where this is aiming. If someone is prepared to pay the price they should have access. We want a baseline level of roaming, but also for CPOs to have freedom to develop business to business relationships that work.

REA – idea is get back end systems more aligned. But then individual alliances will form and emerge. Option 2 is not the final fix, but it would take the whole market forward. This is about getting everyone on to a baseline for roaming in first place.

Comment – roaming is different for CPOs and eMSPs. Each has different needs and wants.

Comment – in UK we have charging networks that don't want it to be open to everyone, they only want it to be available to people paying to have that access.

Comment – so govt can facilitate that opening up.

Comment – yes, absolutely. Its whether govt will grasp the nettle. And whether the incumbent people with no wish to roam are strong in lobbying of govt.

Comment – we can encourage shift from those who don't want to consider roaming as part of their business model.

REA – have had conversations with couple of LAs. Still a significant amount of work to be done in bring up the knowledge base. We may need to provide detail for LAs to cut and paste into own tenders to encourage roaming that way.

Comment – what are the barriers for CPOs to actually be opposed to roaming? Is it technical or financial or market-shared driven?

REA – a few key themes. A few opposed in principle / over concerns about market share. Other have legacy issues. For others it's a question of priorities – it takes time and money from analysts and engineers. From budgets, do you spend it on roaming or on getting kit in ground.

Comment – even when OCPI is being used by both parties, it can still be very time-consuming in terms of technical and legal requirements. We wouldn't want situation where we had to create separate integrations with several eMSPs.

Comment – need eMSPs to accept standard for integration.

Comment – this seems to be very overcomplicated. Delivery of fuel is the key thing. Relationship around transition of data. From payment perspective, eg in digital terms. All we are doing is looking for a response on 'is this person authorised to transition this charging session'.

REA – govt is frustrated about the lack of access and roaming at the moment. They are asking us what the solution is. But problem is industry as a whole, albeit not us, is disinclined to do it themselves. Do you have an alternative view?

Comment – Alternative solution is, we just pay for it.

REA – As the REA we have automotive manufacturers telling govt that payments is a major issue and this is a major question over the future development of the UK's EV market for them. Fleet operators also cite this as a top issue for them to transition. This in turn may impact large investments, such as battery manufacturing facilities (which are a priority for Government to attract). At present we have an interventionist govt. So roaming is quite a major issue and it poses a large question for the membership – do we want to leave it as it is and let roaming emerge in a market led way? The tradeoff with that view is that we may find Government develops a solution without our involvement and to the benefit of other parties / to the benefit of nobody.

Comment – We have overcomplicated way of going about paying for things at the moment. We want a simplified version. In terms of roaming, if you take mobiles as an example. You will get a text message of roaming rates when you go abroad. You'll get charged whatever you are supposed to be. From a public info point of view, to get buy in, should we be looking at how they are publicising the mobile phone roaming perception. Behind the scenes its no different from a domestic customer. But from public opinion perspective, perhaps an angle to look at is charging caps.

Comment – the ease of roaming on your mobile phone in Europe is due to EU regulation.

Comment – legacy equipment is in the ground which is holding back roaming. But that is shrinking nearly every week. We shouldn't be holding ourselves hostage to legacy equipment. By the same token, this transition period, I suggest that whichever of the options we decide to go for provides us with an option to go forward. But there is nothing to stop us, as part of recommended option, outlining a roadmap for the future.

REA – if we could get 30 or 50k in innovation funding what would be the most effective way for us to spend that to move this conversation forward?

Comment – communications is the biggest issue.

Comment – Volkswagen and Nissan gearing up to provide accounts for customers (ISO15118). There will be a battle ahead over who controls customers' accounts. As we move down the line that will be an issue for eMSPs as they will see OEMs coming after their business. Similarly for CPOs the OEMs will look to negotiate a low price. We have 5 -10 years before that takes over. And the question is how do we operate until then.

REA – roaming is seen as big issue by lots of other moving parts in this sector. Ramp up needed urgently of vehicle manufacturing. Macro questions come back to how consumers pay to use these things. This is why the topic is in the mind of politicians.

Comment – moving at this pace is tricky with legislation in an innovative environment

REA – looking at comments in chat box. Eg one on the payment solution development by Norwegians. All it does is register people, it's not a roaming solution. The Norwegian Electric Vehicle Association has 6 full time staff and fields 1k calls and 4k emails per month from their members (drivers) who are largely trying to figure out charging. They are well over 50% of new car sales being electric now – we need to be prepared for public confusion over charging and address it as best possible in the meantime.

REA - To conclude, we have a range of views here. people are concerned about cost, legacy, and ability of CPOs and eMSPs to choose partners. Macro-level – we need to present agreed language to government because we are being asked directly for it. I would strongly welcome further input. We should have another meeting or two before the end of this process.

Comment - Many of the challenges are resolvable. Your position 2 is a minimum defensible position. The aim is to drive the adoption of EVs and some of the issues around price are misplaced. A roaming charge at a premium is perfectly feasible. Inaccessibility of charging is main problem at the moment. Surely its in everyones interest to drive usage of chargepoints.

REA - Looking at chatbox there is definitely opportunity for us to look at language around open standards. Chance for us to reach consensus on that.

Comment – if public money is spent on developing a network it needs to be accessible either via being interoperable or via roaming. Ad hoc payment on both AC and DC essential if public money is being used.

Comment – we call roaming a 'guest user'. Guest user doesn't have to subscribe to app or connection mechanism but pays premium for privilege of using it (sometimes). To me roaming is about allowing guest users.

Comment from consultant – language in Option 2 is good and technically feasible. Only issue this is that clearing the data, whose IT infrastructure is responsible for it, is a big problem. How do you make sure that the data is clean and sent to right place.

REA -if we got 30 -50k funding to do a research project, where would we best spend it?

Comment – One area could be looking at APIs and data management, particularly ensuring customer IDs retain their profile in a roaming environment.

REA – finishing off, I am calling for an offline steer from members on your preferred roaming language. please email me with comments. Option 2 seems to be functional and broadly accepted but a few questions remain about it, such as how do we deal with legacy infrastructure and how do we balance costs for integration between different users. Clear and direct feedback sought. Lots at stake here for the membership and wider sector. All input is hugely appreciated and listened to. General REA meeting on 10 September. Roaming paper sent to members ahead of that meeting and brief discussion of it then. The REA will progress the development of a roaming roadmap – I think this would make this more digestible.

Comment from meeting Chair – to wrap up, we have diverse views. Our challenge is to reach a consensus to present to govt. we've had a good exchange of views and will continue to do so before finalising. Thanks for input all.

***notes end.