



THE ASSOCIATION
FOR RENEWABLE ENERGY
& CLEAN TECHNOLOGY

EV Forum – Full Member Meeting

26th November 2020
12:30pm to 2:30pm

**26 November
2020**



Competition Law Disclaimer

Members are advised to not share market-sensitive information in line with Competition Act.



AGENDA 1/2

12:30pm – meeting start

- Welcomes to new and existing members (15 minutes)
- Update from OLEV (20 minutes including discussion on key themes including the Spending Review, Project Rapid, and the Consumer Experience consultation) – Aaron Berry, Deputy Head of OLEV (confirmed)
- Financing opportunities for the sector – UK Export Finance (10 minutes) (confirmed)
- General discussion on the spending review
- Update on PAS 1878 / 1879 and other data-related workstreams (brief update and note of working group meeting)
- Ofgem's EV Strategy (brief update and note of working group meeting)



AGENDA 2/2

- Rapid Charging Fund – update on progress and joint letter to OLEV
- Consumer Experience of Public EV Charging Consultation update
- Accessibility (in relation to disability) of charging infrastructure – emerging themes and discussion of Motability paper.
- Smart Charging and Building Regulations Consultations update
- Update on the work of the EV Energy Taskforce 2.0
- Domestic and workplace charge point installation safety & OLEV work in this area
- Discussion on collaboration with the British Parking Association
- COVID, Lockdown 2.0 and REA activities
- EV Consumer Code and EV Roam updates
- Note on Charge Point Professional training courses
- Update on REA Strategy Development & Business Planning (REA)

2:30pm – meeting close



IONITY

@Charger



enertech

broham
FORECOURT DEVELOPMENTS LTD

 VolkerSmart Technologies

 EV INFRASTRUCTURE
SYSTEMS
a WOLSELEY company

MIRALIS



Welcome
to new
REA EV
Forum
members

Update from OLEV

Updates from Aaron Berry, Deputy Head of the Office for Zero Emission Vehicles on the Spending Review & other themes



Update from UK Export Finance

Funding Opportunities for the EV Sector - Julian Lynn, UK Export Finance



Spending Review – General Discussion

Q&A from members on the spending review

General discussion on REA next steps and actions



PAS 1878 and 1879

Discussion on PAS 1878 and 1879

REA member speaker – Ian Goodwin from EVs.Energy

REA key issue for member comment: should 'vendor lock in' be prohibited in 1879?

In-depth member working group meeting on this topic to take place on the 27th November 2020 at 1:00pm – 2:00pm. Email dbrown@r-e-a.net to attend.



Discussion on Ofgem's EV Strategy

Key priority areas for the REA to advance identified so far include:

- Wayleaves
- 99 year substation leases
- Maximum Demand Assessments for home installations
- Greater visibility and open data at distribution network substations
- First-mover disadvantage at grid upgrades

In-depth working group member meeting on this on the week of 7th December – email dbrown@r-e-a.net to attend.



Ofgem EV Strategy

1

•Electricity Connection application submitted.

2

•Receipt of confirmation sent, 60 days countdown begins to process application.

3

•Wayleaves officers in DNO's legal department review technical charge point plans.

4

•DNO's legal department identifies the land owners through the land registry, and sends letters to the relevant individuals notifying them of the request for a wayleave.

5

•Landowners recontacted via post.

6

•Landowner has 21 days to accept wayleave agreement, after which the DNO has the right to exercise its statutory powers, escalating the matter to a wayleave hearing. The Secretary of State will then rule on the case as to whether the charge point infrastructure is necessary and expedient.

7

•DNO may alternatively negotiate easement with landowner.

8

•If the landowner accepts the agreement, the wayleave is issued and the project goes ahead.

Problems Arising

Confirmation of receipt delayed, or communications repeated to delay start of 60 days countdown

Wayleaves officers hard to contact, internal DNO departments and structure not transparent

Landowners identified by land registry, can take a long time (inefficient). Landowners also often do not acknowledge postal notification.

Delay in follow up contact, lack of urgency from DNO.

No communication from landowner means case could be heard at a hearing - a lengthy and expensive process.

Unless it is for their own purpose, DNO's will not invoke the Statutory process. This can leave matters in limbo ad infinitum.

Charge Point Installer not informed of negotiations or extra associated costs.

Charge Point Installer left waiting months with no communication from DNO, meaning charge point economic viability has now passed.



Rapid Charging Fund

Fund was 'up to £500', now £950m following Spending Review.

REA Published a [blog](#) and letter to Government in June, and lobbied for the initial funding for the Spring Budget 2020. Now the debate is on how this is administered – grants or independent development authority who can coordinate upgrades and be off-taker of most new capacity?

REA drafting new letter with MSAs and West Midlands Combined Authority to reinforce message and show widespread support.

OLEV confirmed they are intending to develop an arms length authority to be accountable to Government. They are asking us: how should this look? Should they contract a consultancy, give to Highways England, contract electrical firm or build a new body? Also debate around future scope and role of private investment.

Business case to be submitted in April 2020, feedback needed in next 6 weeks.

Rapid Charging Fund – New letter key points

- This Authority should coordinate and develop electricity grid / DNO connection upgrades for Motorway Service Areas and other key sites along the strategic road network (and A road networks) where rapid EV charging will be required. This body will take responsibility for the long-term ownership of this new grid capacity, if and where appropriate.
- The Authority would develop projects, or coordinate the development of projects, independently and in line with the outputs of Project Rapid and would be accountable to Government.
- The Authority could be staffed by a small team of transport planners, former project developers, and electrical engineers specialising in the EV charging sector.
- The Authority could play a role in commissioning the least cost and/or most appropriate organisation to do the development work, be it National Grid, a distribution network operator, independent distribution network operator, private wire company, or other entity.



Rapid Charging Fund – New letter key points

- The Authority would ensure that the right amount of electrical capacity gets to each site, based on the needs modelled per site to 2050 as part of Project Rapid. The Authority would collaborate with local and combined authorities to ensure they are aware of the works and that they are able to input to plans given existing regional strategies. They would also coordinate with the owners of each site to deliver their part of the required infrastructure.
- The Authority could ensure that all sites requiring expanded capacity would receive it, and not necessarily prioritise areas with higher margins for charge point operators. The focus would be on the needs of the EV driver.
- The Authority could be the owner of this new grid connection capacity (itself or in partnership with other authorities) and lease out the capacity to MSAs or Charge Point Operators (CPOs) through a percentage-of-use or alternative revenue system to maximise the value of this investment in supporting decarbonisation objectives



Rapid Charging Fund – new letter key points

- Considering industry concerns that up to £500m may not be a large enough investment to achieve the site upgrades that are required across England, the Authority could match Government money with private investment which would be repaid through the aforementioned leasing model.
- The Authority could use any profits to expand its remit to other strategic energy and transport technologies which will require coordination along the Strategic and A Road Networks between now and 2050, such as the provision of hydrogen and renewable natural gas refuelling hubs for vehicles such as coaches and Heavy Goods Vehicles, resulting in the deployment of multi-modal transport hubs.



Consumer Experience of EV Charging Update

As per the National Infrastructure Strategy:

Government will be consulting on regulations to improve the consumer experience at public chargepoints later in 2020. There are four core areas in the consultation, including **payment methods and payment roaming**, **opening up chargepoint data**, increasing the **reliability of the charging infrastructure** and ensuring **pricing transparency**.

Consultation due December (or January?) – how do we want to proceed?

Key options include:

- Survey of drivers
- Survey of members
- International case studies and data

What key points have been influential in similar discussions in other markets?



Accessibility of Charging Infrastructure

Key issue arising from the Building Regulations consultation but now likely to be part of a Call for Evidence accompanying the consultation on the consumer experience on public EV charging.

REA working with Motability.

Key issue for industry to consider and develop – what does ‘accessible’ infrastructure look like? How do we break this down across different types of disability? Do we want a third-party mark to ‘certify’ chargers are accessible to different types of people?

Potential workshop with Motability and OLEV in due course.

Discussion – are there examples or experiences from other markets?



EVET, Smart Charging, Building Regulations

EV Energy Taskforce – four workstreams that REA is assigning member leads on.

- WG1: Coordination of infrastructure roll out (Pivot Power and Fastned)
- WG2: Consumer communications and issues-handling (TBC)
- WG3: Cyber security and smart charging (Enel X and Plugin Power)
- WG4: Data access and privacy (TBC)

Smart charging – regulations expected 2021

Building regulations consultation – regulations expected 2021



Domestic and workplace charge point safety

OLEV has now appointed a full time lead on product and installation safety.

REA has been meeting with the OLEV lead on this issue, and connecting with members.

Potential for Government to introduce third-party product certification requirements.

Workshop with OLEV safety lead in December – invites have gone out to REA manufacturer members (but get in touch for more details).

REA seeking to ensure the EV Consumer Code is seen as a key industry-led mechanism to improve safety and consumer confidence.

All this follows an audit of the EV Homecharge Scheme which found unsafe installations – this is concerning the Minister.



COVID, Lockdown 2.0, REA activities

We have received guidance from Government stating:

- OLEV will not be issuing sector-specific guidance themselves. However, they issued a clarification note to installers (below).
- The primary guidance the sector should follow can be found [here](#).
- Additionally, for installers and others working on supporting/providing EV infrastructure there is guidance for people working in construction or outdoors [here](#).
- Overall, the REA understands that construction and maintenance activities should still be acceptable at present so long as guidance is adhered to.

Ofgem: "We do not currently intend to return to distinguishing between high priority and low priority works and services in the way we did from April to June. So the guidance for networks that we published on 1 July still stands ([link here](#)).

Other issues arising?



EV Consumer Code & EV Roam

EV Consumer Code

- Now 2 Affiliates – MyEnergi & Garo
- 12 installer members
- Seeking more affiliates

EV Roam

- Now launched
- 11 companies registered IDs



Charge Point Professional

We have now run a DIRECTORS and ECOSYSTEM course.

“As a Marketing Manager at Hypervolt, the ECOSYSTEM course helped me elevate my content strategy, engage in even more technical conversations and create business partnership proposals with knowledgeable confidence.”

Andre: “This course gives you a really good overview of what the EV and EV charging landscape looks like and how it works.”

Bright Blue: The ECOSYSTEM course provided me with a thorough grounding in the EV charging market and relationships between its different participants and components. The course layout is straightforward and provides helpful information in one easily accessible location.

Lucite: “I would recommend this course for anyone outside of the EV industry wanting to gain an understanding of the complexity and players involved with a market segment still in its infancy. The sign of a good course – the day flew by!”



REA Strategy and Business Planning

REA developing a cross-association strategy

Transport Pillar has a Board Sponsor – Duncan Valentine from Almax Partners

Each pillar has a working group. Transport pillar WG members:

- Hitachi ABB Power Grids
- Enel X
- Pivot Power
- Neste
- ITM Power
- IN Perpetuum Partners
- Velocys
- Others

Final output will help REA define key workstreams and resourcing in 2021+





THE ASSOCIATION
FOR RENEWABLE ENERGY
& CLEAN TECHNOLOGY

Thank you for your time

For more information, email dbrown@r-e-a.net

www.r-e-a.net

REA Restricted: This contains information that is confidential to the REA and its members and should be not be shared without permission

