

# Electric Vehicle Workshop

*17 September 2018*

## Summary & Next Steps

By Gemserv



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# Introduction

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The uptake of Electric Vehicles (EVs) is expected to grow exponentially in the UK over the next few years, driven by legal obligations to meet air quality regulations, climate change targets and government's targets for zero emissions vehicles. Yet, despite government incentives for the purchase of EVs and the installation of charging infrastructure, the market is slow to upscale, with the sales of diesel and petrol cars still dominating the market.

On Monday 17<sup>th</sup> September, 31 representatives<sup>1</sup> from across the EV value chain, including BEIS, OLEV, Citizens Advice and key stakeholders from the energy, manufacturing, digital and innovation sectors came together at Gemserv, to discuss the need for a UK industry-wide governance framework.

The point was made that there is a need for industry to step up before government and regulators put restrictions on the sector. What can be done to accelerate the uptake of EVs? Is the UK at risk to miss out on a global market opportunity?

Matthew Evans, Executive Director of techUK's Broadband Stakeholder Group, provided information on the learnings from the broadband and mobile infrastructure roll-out including the investment strategy, timeline and business models such as the neutral host model which helped drive the business case on a network level.

Following up on the outcomes of the first EV workshop, a draft EV Governance Framework (EVGF) was presented. The participants of the EV Workshop were divided into three groups during the breakout sessions to discuss the four areas covered by the EVGF. This was followed by a plenary session with participation from all the attendees to discuss the framework and ideate the next steps going forward.

As discussions have progressed over the 1<sup>st</sup> and 2<sup>nd</sup> EV Workshops, industry representatives are converging towards the view that an EVGF has a key role to play to enable the market. This EVGF could be governed by an industry-led forum, which would develop a code of practice to proactively pre-empt a market failure scenario.

The EVGF will initially cover four areas, but will not be limited to:

1. Efficient charging infrastructure deployment and service delivery.
2. A holistic approach to smart charging to increase grid flexibility and renewable energy sources.
3. Standards for customer service and protection.
4. Coordination and collaboration between market actors.

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<sup>1</sup> See appendix for full list



# Summary of Breakout Sessions

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The areas to be addressed as part of the Electric Vehicle Governance Framework (EVGF) development were discussed in the breakout sessions, crystallising the thought process in the context of:

- Is there market failure?
- If so, who is responsible for fixing it?

## 1. Efficient charging infrastructure deployment and service delivery

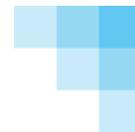
It was discussed that there is no alignment between people buying EVs and the location of charge point installations. Should EV sales data be shared with Charge Point Operators (CPOs)? There is no guidance as to where to install charge points – should that be market driven based on e.g. utilisation? From a national infrastructure perspective should DNO's own the charge points to improve efficiency and planning of charge point installations while CPOs would be responsible to operate and deliver EV charging services? Currently the market is segmented into public and private charge points and clarity is needed with regards to the EVGF taking a system-wide, holistic point of view including home, business and public charging. Use cases regarding car owners and fleet rental companies need to be considered. It was said that in the absence of an EVGF, government could apply a 'wait and see' approach to find out which areas still need to be covered thereby delaying investments. It was raised that there may be a knock-out effect of subsidy for the consumer and consideration should be given to subsidise the supply side of charge points as well.

## 2. Holistic smart charging deployment to enable grid flexibility and grid services

It was discussed that there are a range of use cases that form the basis for different business development models in the EV space for example:

- EV package deals offered to the market from different market players raising the issue of who owns what: Who owns the car and the charge point? Who owns what data and who must have access to it?
- Who has responsibility for components such as the battery, charging solution, service delivery when things go wrong?
- Does the use of the vehicle for V2G impact product warranty?
- Open data (support roaming) was suggested as a model, but how much data would need to be shared?

Smart charging is all about data and sharing of data between energy and automotive sectors. The question was asked: would an additional regulator be needed to cover smart charging?



### 3. Standards for customer service and protection level

While existing regulations are unlikely to cover the breath of new business opportunities there need to be alignment between the EVGF and existing regulations, particularly around customers regarding transport, energy, data and customer care. There is a recognition that customers are not fully informed about EV charging, so the question was asked if we should widen the scope of the EVGF to include customer education? It is common place that dealerships often don't give enough or even wrong information to people buying EVs, especially when it comes to charging the EV. Customers are unsure how and where to charge their vehicle despite the work done by the LowCVP and Go Ultra Low initiatives. There are several aspects to be dealt with, for example: What will the customer pay for charging their EV; Who will set the price; Will this depend on where you charge your car; Will it be a set price, competitive or regulated?

While there is clear benefit to an open data approach, there are some questions around the (mis)use of data for price setting. Customers could get concerned about the price changing as a result of their travel and charging behaviour.

Related to the above point is the Ofgem's consultation on access to half-hourly electricity data for settlement purposes: "In order to settle customers half-hourly, suppliers need access to their customers' half-hourly consumption data from their smart meter."<sup>2</sup> Will customer personal data be safeguarded in this new world?

The EVGF offers the opportunity to add detail to existing consumer protection regulation.

### 4. Coordination and collaboration between market actors

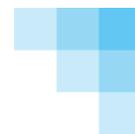
There is no doubt that the list of actors in the EV space is long and collaboration is necessary but complex.

The question was asked whether there should be a single regulator to cover all aspects of the EV sector: energy, transport, data and customer? There already exist ombudsmen for automotive and energy, but what about charge points? Would it be easier for a regulator to regulate if they had access to data or access to the API? It was discussed that a bespoke solution for the UK may emerge that ultimately would be unhelpful for British businesses to scale up to a global market. Building on existing legislation, it is important to make sure that the EVGF is aligned with regulation/standards on European level; existing legislation like GDPR and the Alternative Fuels Infrastructure (AFI) Regulations; initiatives around standardising plugs/cars, etc.

The need to ensure involvement of the Local Authorities was brought up, and that collaboration is at the heart of a Gemserv EVGF led approach delivering pre-emptive corrections to failing market scenarios. Furthermore, there needs to be clarity as to how the EVGF would maintain an agile delivery process with sustainable finance.

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<sup>2</sup> <https://www.ofgem.gov.uk/publications-and-updates/consultation-access-half-hourly-electricity-data-settlement-purposes>



## Other thoughts

- As the EVGF is developed, it needs to be tested against different scenarios: Where is the market going? What could be the effects of taxation of vehicles/fuels? It would need to be brought down to more detail to be able to really test the EVGF.
- Market failure: what should be done when you own an EV, but no smart meter?
- Universal service: should anyone be able to buy an EV and charge it?

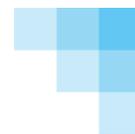
## Summary of Plenary Session

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During the plenary session each group summarised their discussions and viewpoints. It was discussed whether a Genserv-led industry-wide Electric Vehicle Governance Framework (EVGF) was the way forward to give reassurance to the market place.

A summary of the responses that were voiced by industry and government representatives is provided below:

- Would the timings of the OLEV and Genserv consultation overlap?
- There is a need for customer protection. Even if this was voluntary, it could work.
- A recommendation was made about engaging with Local Authorities as they are an important stakeholder.
- The need for coordination between all the market actors was reiterated.
- The value generated for businesses operating in this space needs to be identified, as there are different business models being deployed currently.
- It is important to obtain feedback from the car manufacturers as well.
- The context of the EVGF should be clearly framed in the consultation as it could be too wide.

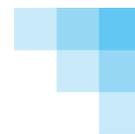


## Next Steps

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A lot of very interesting points were brought up during the workshop with key themes being around overall agreement on the need for governance and standards for addressing the challenges, as well as the need for industry-wide collaboration. Gemserv has been tasked to develop an industry-wide consultation to facilitate an evidence based, cross-industry supported approach.

A 3<sup>rd</sup> EV Workshop is also in preparation to shape this cross-industry sector consultation designed to collect written evidence form a wider audience as a basis for the development of the Electric Vehicle Governance Framework that works for all stakeholders and the customer.



## Appendix: List of Attendees

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Organisation	Name
BEIS	Ben Cattermole
Carbon Limiting Technologies	Jeffrey Beyer
Centrica	Helen Stack
CGI	Rich Hampshire
Citizens Advice	Victoria Pelka
Compass Lexecon	Sabire Demir
E.ON	Neil Smith
EDMI	Aran Naidu
ENA	Alex Audu
Energy UK	Charles Wood
Energy UK	Eleanor Wilkes
Engage Consulting	Andrew Margan
Flexpower	Michael Ayres
iDigitalise	Salim Somani
Igloo Energy	Gareth Wordingham
Independent consultant	Chris Price
Infrastructure and Projects Authority (IPA)	Philippa Eddie
Innovate UK	David Richardson
Legal & General Investment Management (LGIM)	Adam Muckle
New Energy	Anna Tsereteli
npower	Andy Baugh
OLEV	Steph Edwards
OLEV	Henry Phillips
OLEV	Joscelyn Terrell
Omron	Lew Charlton
OVO Energy	Tom Pakenham
Renewable Energy Consumer Code (RECC)	Virginia Graham
Rexel	Charlotte Carter
Scottish and Southern Electricity Networks (SSE)	Sara de la Serna
techUK	Matthew Evans
Transport Systems Catapult	Rebecca Advani

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