

# Fleets in Charge

Plugging the gap: foundations  
for fleet charging  
**Webinar**  
8 March 2023

#FleetsInCharge  
[bvrla.co.uk/fleetsincharge](http://bvrla.co.uk/fleetsincharge)

In partnership with



**ARVAL**  
BNP PARIBAS GROUP



Delivering road transport decarbonisation

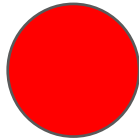


# Competition Law: Do's and Don'ts

All BVRLA meetings and calls are subject to the application of competition law and therefore must be conducted in compliance with competition law. Attendees are reminded that failure to comply with competition law may bring with it serious consequences for them as individuals and their companies. Such consequences include heavy fines and, in certain cases, the imposition of criminal penalties and sentences.

Members must refrain from exchanging any commercially sensitive or strategic information between competitors, either directly or indirectly via a third party, can result in an anti-competitive agreement. BVRLA has developed the following guidelines to help you adhere with the competition rules. If you have any doubt, then you should seek advice – BVRLA senior staff are at hand should you have any questions.

## DO NOT



- Discuss individual company prices, price changes, terms of sale and profit margins.
- Discuss information as to future plans of individual companies, production, distribution or marketing plans, including proposed new territories or customers.
- Discuss matters relating to individual suppliers or customers or any commercially sensitive information.

## BE WARY

### YOU MUST SEEK ADVICE IF:

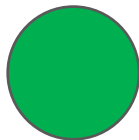
You receive information from another competitor, or are asked to provide information, that you believe is confidential or commercially sensitive.



## ALWAYS:

- Ensure a detailed agenda has been circulated in advance and is followed closely and minutes of the meeting are recorded and kept.
- Begin the meeting with the reminder that the attendees should not discuss commercially sensitive information under any circumstances.
- Be prepared to halt a meeting if conversations cross into potentially unlawful territory.

## NO PROBLEM



- Discussion on any matter relating to the aims and objectives of the committee – for example issues of law and policy affecting the industry.
- Discussing BVRLA policies, lobbying tactics & strategies, and other BVRLA activities.
- Discussing information about industry activities obtained from third parties or other media sources provided the availability of the information has not been arranged with a competitor.
- Discussion with other trade bodies or organisations which will be of general benefit to the industry.

# Recognising fleet user's needs

Catherine Bowen  
Senior Policy Advisor, BVRLA



**BVRLA**



## BVRLA's Fleet Charging Guide

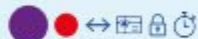
- Knowledge gap – private sector fleets
- Support – EV Infrastructure Strategy/EVET modelling
- Local authority greater responsibilities
- Diversity of fleet
- Usage profiles, challenges and type of charging required
- High level policy recommendations
- Start point – ability to build on over time



# How Fleets Charge



## Delivery services (distributed locations)



- Multiple calling points, and different routes every day
- Driven throughout the working day
- Van taken home by driver at the end of a shift
- Driver may not have off-street parking



## Engineer/work van (non-depot based)



- Significant range and journey variation day to day
- Shift work, may be on call or away from base
- Vehicles taken home by driver at the end of a shift
- Driver may not have off-street parking



## Engineer/work van (depot based)



- Significant range and journey variation day to day
- Shift work, may be on call or away from base
- Return to depot overnight



## Delivery services (depot based)



- Multiple calling points, and different routes every day
- Driven throughout the working day with limited downtime
- Return to depot overnight



## Private Hire/ride hailing



- Driven throughout the working day with limited downtime
- Vehicle taken home by driver at the end of a shift



## Flexible vehicle (car club)



- Highly variable daily mileage
- Typically located in urban/city centres
- Limited downtime between rentals



## Flexible vehicle (rental)



- Highly variable daily mileage
- Limited downtime and need to charge between rentals
- Customers need to charge at destinations



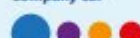
## Disabled user



- Variable personal use
- Mainly return to home overnight
- Accessibility critical



## Company car



- Variable personal and business use
- May have long distance journeys
- Mainly return to home overnight



Near Home



At Depot



Destination



At Home/Work



Rapid



**KEY**







Types Of Charging	Type Preferences
<span style="color: red;">●</span> Rapid	<span style="border: 1px solid black; border-radius: 50%; width: 20px; height: 20px; display: inline-block;"></span> Preferred Type
<span style="color: blue;">●</span> At Home/Work	<span style="border: 1px solid black; border-radius: 50%; width: 20px; height: 20px; display: inline-block;"></span> Other Types
<span style="color: purple;">●</span> Near Home	
<span style="color: orange;">●</span> Destination	
<span style="color: green;">●</span> At Depot	

**Key Charging Challenges**

-  Grid Capacity
-  Accessibility
-  Payment Interoperability
-  Limited Downtime
-  Secure Parking



# Road to Zero Report Card 2022 - Overall Vehicle Scores

	 <b>Cars</b>	 <b>Vans</b>	 <b>HGVs</b>
 <b>Demand</b>	<p><b>Cruising</b></p> <p>Fiscal incentives, ESG commitments and innovative mobility offerings have propelled strong growth in demand.</p> <p>Momentum will only be maintained through certainty on BiK rates.</p>	<p><b>Cruising</b></p> <p>Interest in e-vans is high, with growth in order books across multiple use cases.</p> <p>The Plug-in Van Grant is essential in making the growing number of e-vans affordable.</p>	<p><b>Accelerating</b></p> <p>From an almost non-existent base, firms are giving serious thought to how they can deploy zero emission HGVs.</p>
 <b>Infrastructure</b>	<p><b>Accelerating</b></p> <p>A continued expansion of publicly available infrastructure is improving the situation for current users.</p> <p>As supply bottlenecks recede, infrastructure rollout will need to speed up.</p>	<p><b>Parked</b></p> <p>Concerns over vehicle downtime and inaccessible chargepoints are not being addressed.</p> <p>Van needs must be considered at the design and deployment stages of future infrastructure.</p>	<p><b>Parked</b></p> <p>Whilst freight trials are welcome, we are no nearer to a definitive powertrain roadmap.</p> <p>This clarity is essential in developing a long-term HGV infrastructure plan.</p>
 <b>Supply</b>	<p><b>Accelerating</b></p> <p>Zero emission car model choice has surged this year.</p> <p>Ongoing global market supply chain pressures are holding back demand.</p>	<p><b>Accelerating</b></p> <p>The first generation of mass market ZEV vans are starting to come to market.</p> <p>Growth is being constrained by enduring delivery challenges and a continued lack of appropriate ZEV vans for many use cases.</p>	<p><b>Parked</b></p> <p>HGV supply chain resilience for vehicles and parts is also dependent on a clear zero emission powertrain roadmap.</p>



## Infrastructure

Thousands of new public chargepoints have been added to the UK network over the last twelve months, but there is growing fleet industry concern about whether they are arriving in sufficient numbers or are fit for purpose and accessible. Local Authorities (LAs) must step up to ensure that neighbourhood infrastructure meets the needs of all car and commercial vehicle users.

### Rating

Brakes On



Accelerating in 2021

### KPIs

The key performance indicators used to track infrastructure rollout

#### Public Charging Availability

Accelerating

#### Public Chargepoint Data Availability

Brakes On

#### Local Authority Engagement

Brakes On

#### Fleet Suitability

Parked

### Top recommendations



Local authorities (LAs) must develop EV infrastructure strategies which acknowledge fleet users and cater for all users and vehicle types



Equalise VAT rates between home and public charging



Work with local authorities and the fleet industry to develop van-friendly chargepoint standards

# Local Authority (LA) Engagement

- 68% of LAs have EV Infrastructure Strategies completed or in development
- Fleet friendliness - few examples of good practice
- Message about van accessibility seeping through
- But, LAs mostly thinking about certain fleet segment or their own fleets

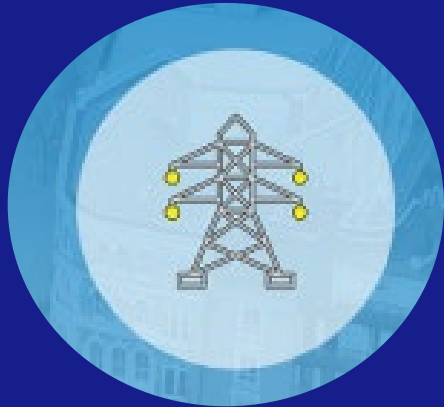
## Developing relationship with LAs

- Develop EV Infrastructure – all users & vehicle types
- CVs – key part of the community





# New sections for 2023



## Rental operations at airports

- Different decarbonisation timelines
- Added complexity - various stakeholders
- Range of charging options considered
- Lack of engagement – making it difficult to plan

## HGV Transition

- Early stage
- Ongoing powertrain uncertainty
- Focus medium duty – back to base operations
- Depot charging & grid connections

## Grid connections

- Cost & timing
- Scepticism Ofgem proposals
- Delays at every stage
- No consistency in timings/process across DNOs



## Next steps

- Fleet Charging Guide & LA maps – launched 15<sup>th</sup> March
- Parliamentary reception – MPs encourage LAs & other stakeholders to ‘think fleet’
- Engaging with LAs, sub-national transport bodies & LA support body
- Progressing recommendations – various stakeholders – OZEV, LAs, DNOs, Airports



**I support the roll-out  
of fleet friendly  
EV infrastructure**

**#FleetFriendlyCharging**







Department  
for Transport

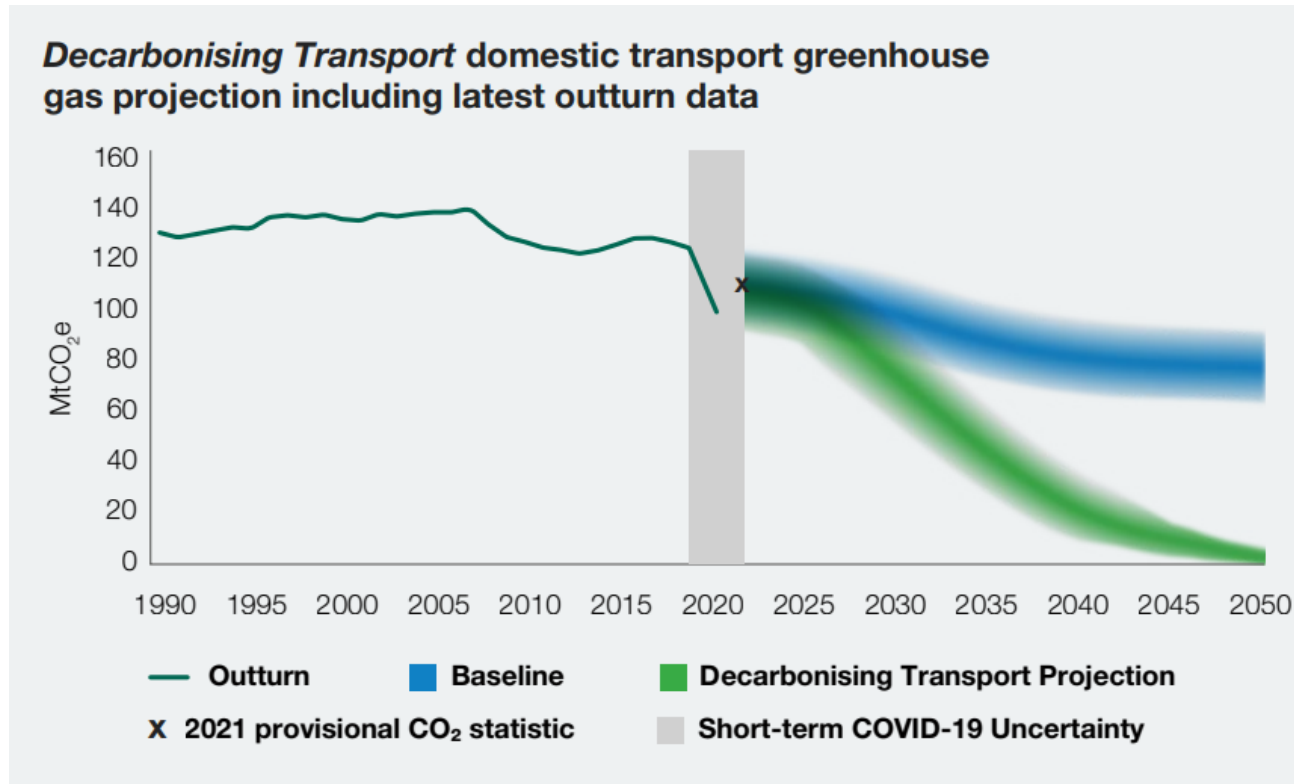
# Local EV Infrastructure Fund

BVRLA webinar- Aaron Berry

8 March 2023

# In 2021 we published the Transport Decarbonisation Plan and the Net Zero Strategy...

The TDP – *Decarbonising Transport: A Better, Greener Britain* is the ‘greenprint’ to decarbonise all modes of domestic transport by 2050.



The Net Zero Strategy is Government’s delivery plan for meeting Carbon Budget Six. It also set out the policies and pathways to fully decarbonise the UK economy by 2050.



# ~10 million vehicles on UK roads will be electric by 2030

**37,625** Chargepoints in the UK, including more than 6,887 rapid chargepoints – one of the largest networks in Europe



Department for Transport

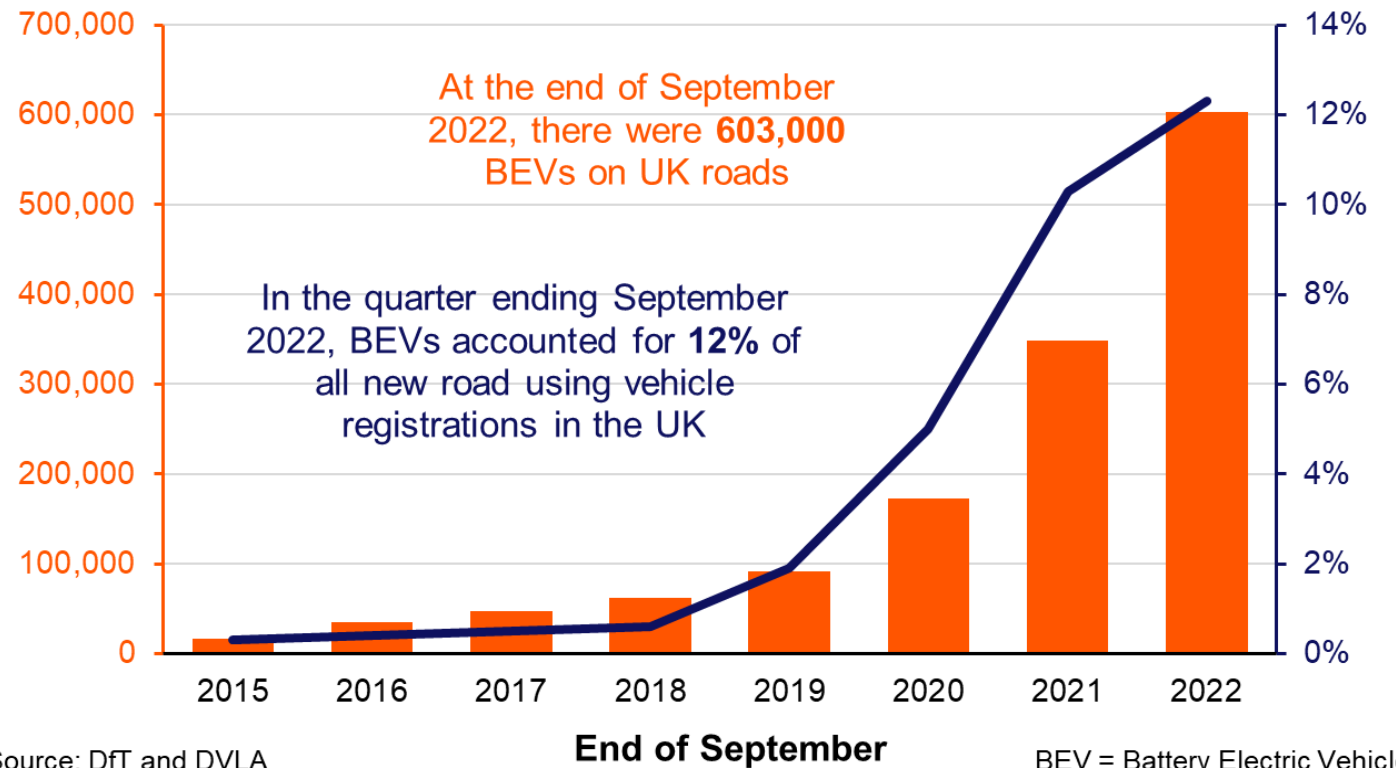
## Decarbonising Transport

A Better, Greener Britain

One Year On

Total licensed BEVs in the UK

BEV share of new UK registrations (%)



Source: DfT and DVLA

BEV = Battery Electric Vehicle

# Successful ZEV transition demands a sound infrastructure



HM Government

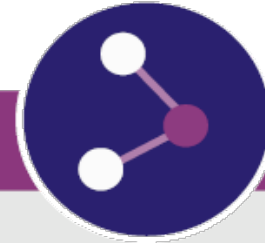
## Taking charge: the electric vehicle infrastructure strategy



Everyone can find and access reliable public chargepoints wherever they live.



Effortless on and off-street charging for private and commercial drivers.



A reliable network of high powered chargepoints along major roads.



Fairly priced and inclusively designed public charging, trusted by consumers.



Market-led rollout for the majority of chargepoints, backed by competition.



Infrastructure seamlessly integrated into a smart energy system.



Continued innovation to meet drivers' needs.





# Government are intervening to address three key challenges



## 1. Consumer experience

Chargepoints can be difficult to use, unreliable and require multiple apps and smartcards.



## 2. Pace of rollout

Local rollout is too slow, with patchy provision of **on-street charging** for people without home charging.



## 3. Charging for long journeys

Connecting new on-route chargepoints can be slow and costly and the current MSA offer is poor.

# The local challenge is significant with key roles across organisations

## Our Vision



Everyone can find and access reliable public chargepoints wherever they live.

**2023** → **2030**

c. 37,625 total public chargepoints

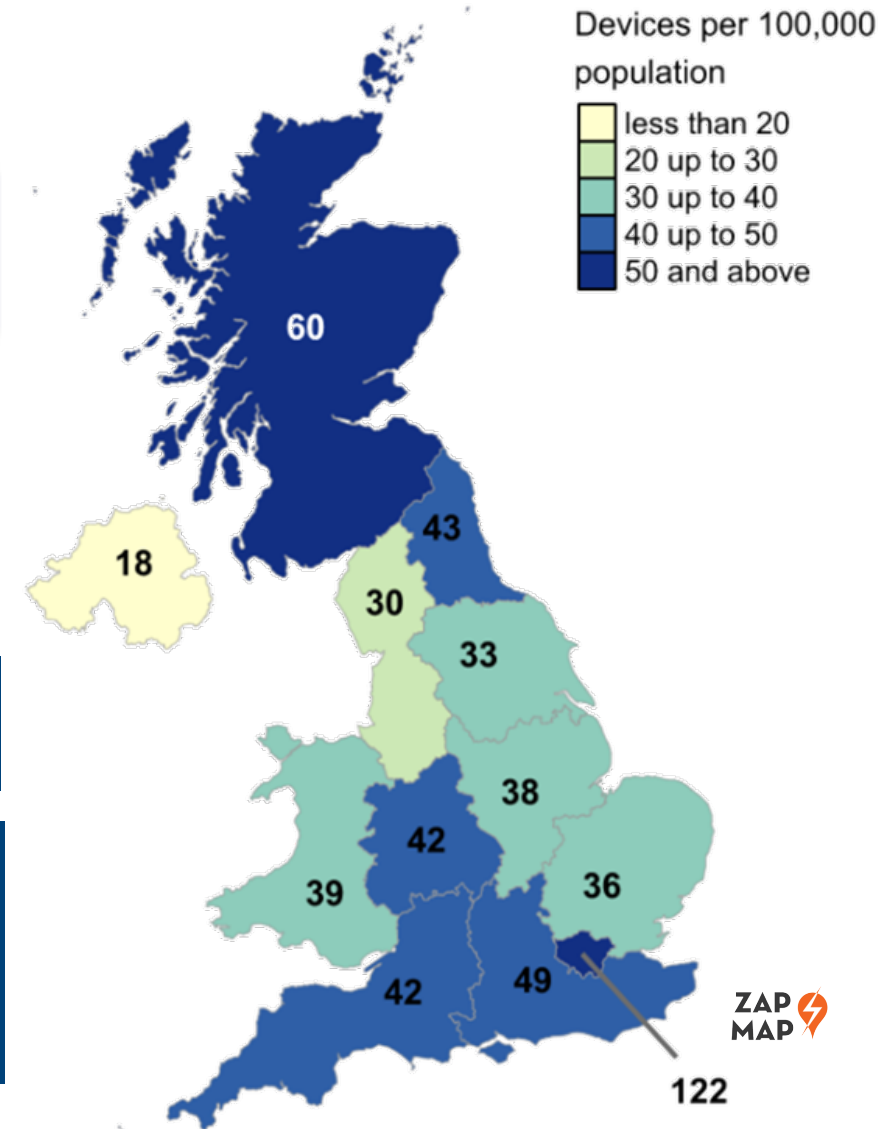
High regional disparity in deployment

Local authorities lack the resource to plan and deliver infrastructure

c. 280,000 – 720,000 total public chargepoints

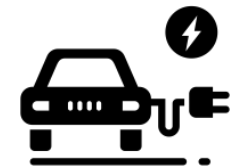
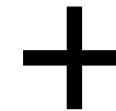
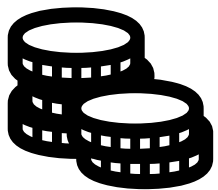
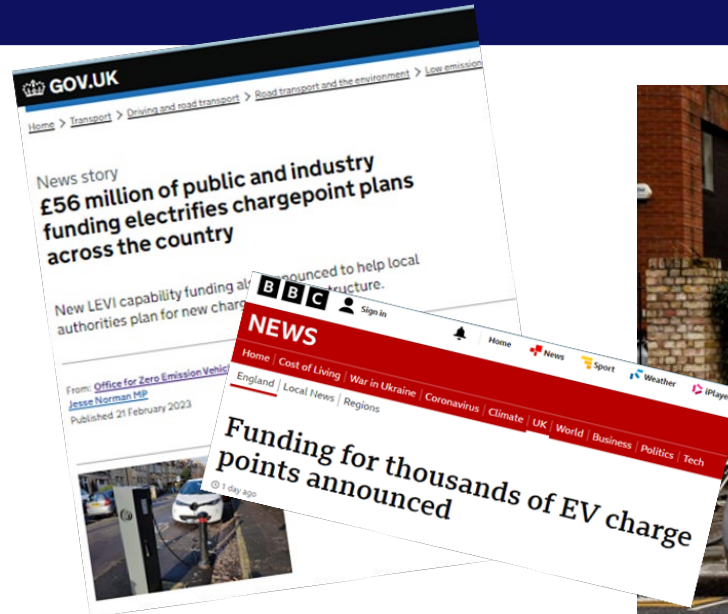
More equitable regional access for all drivers

Every local authority will have resource dedicated to EV infrastructure delivery



# Funding announced

On **21 February** Government announced: UK drivers will benefit from an additional **£56 million in Government and industry funding** for increasing electric vehicle (EV) chargepoints across the country.



An extension of **£22m to the LEVI Pilot**. 16 new projects and 3 expanded projects to deliver 2400 chargepoints

Launched the **£8m LEVI Capability Fund** will equip local authorities with the skills and ambition to scale up chargepoint planning

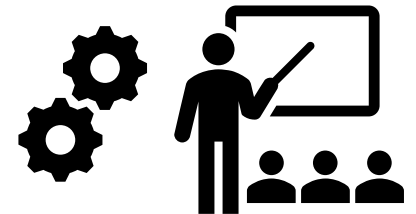
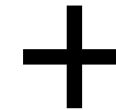
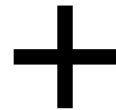
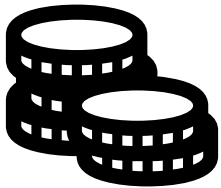
A further **£7m for ORCS** to support more local authorities to roll out electric vehicle chargepoints



# What is LEVI?

## Two key objectives:

1. **Delivering a step-change** in the scale of deployment of local, primarily low power, on-street charging infrastructure across England
2. **Accelerating the commercialisation of, and investment in, the local charging infrastructure sector**



**LEVI Capital funding** to support deployment of infrastructure ahead of need.

**LEVI Capability Fund** to increase local authority resourcing for the planning and delivery of EV Infrastructure.

Provision of tools, training, and sharing of best practice via **the LEVI Support Body**.

# LEVI and Fleets



Fleets are an important early adopter market

LEVI supports residential charging, including those that take fleet vehicles home

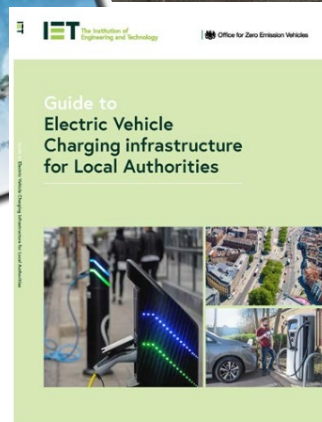
We **engaged** extensively on the design of LEVI funding

Focus on **flexibility, collaboration** and **support**

**Encouraging** LAs, DNOs, CPOs, fleets, transport boards and other stakeholders to **share** rollout plans on public charging needs to 2030

**Published** the LA toolkit in March 2022

**IET Guidance to LAs** will be published soon!



### There is more to come in 2023:

- **DEEP DIVE EVENT:** 16 May, Battery Health – degradation rates, usage patterns, solutions and data; unpacking the battery health mystery and protecting RVs
- **CONFERENCE:** 20 September, QEII Centre in London.
- **WEBINAR:** 8 November, Energy and charging systems of the future – Batteries on wheels, can fleets manage the grid? Is smart smart enough? What are the commercial opportunities?

If you want to find out how you can get involved in these events,  
speaking or sponsoring then drop us an email:  
[brandpartnerships@bvrla.co.uk](mailto:brandpartnerships@bvrla.co.uk)





# Final Thoughts

- Thank you to our speakers and you for participating in today's webinar.
- Video of webinar will be made available to watch again.
- Today's webinar is part of Decarbonising Transport Week. There are more live and free webinars throughout the week.

**Decarbonising**<sup>™</sup>  
**Transport Week**

*6/10 MARCH 2023*