

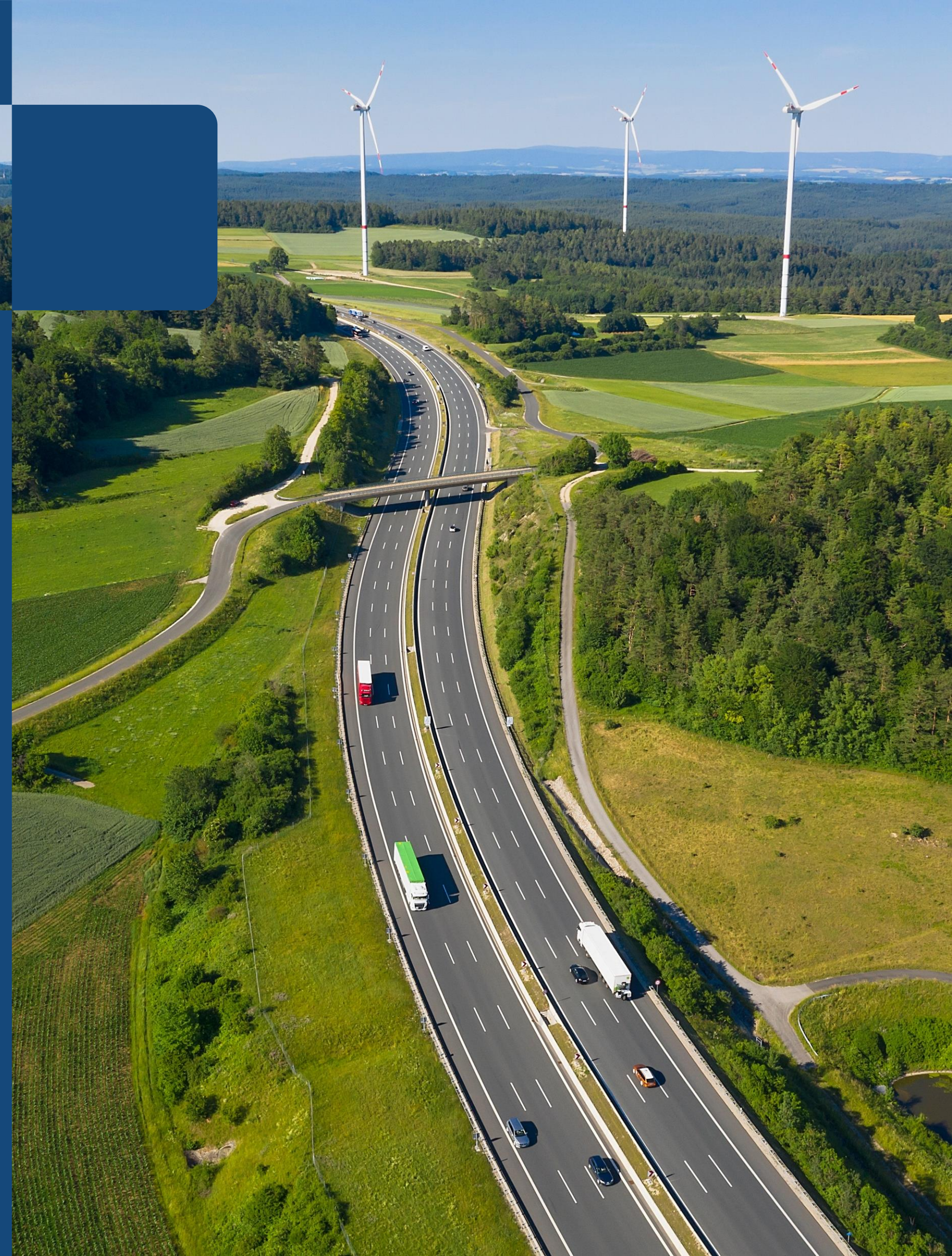
**energy
saving
trust**

Welcome to Scotland's EV Charging Future

A meet the buyer event for CPOs, LAs and
other Scottish charging infrastructure
stakeholders

Gordon Manson

29.01.25



Order of the day

Time	Segment	Details
09:15 – 10:00	Registration	• Breakfast rolls, teas, coffees & networking
10:00 – 10:05	Welcome to the event	• Gordon Manson (EST)
10:05 – 10:20	Keynote address	• Fiona Hyslop MSP (Cabinet Secretary for Transport)
10:20 – 10:50	Scottish Futures Trust update	• Matt Jackson & Alastair Young (SFT)
10:50 – 11:15	Morning break	• Teas, coffees & networking
11:15 – 12:45	Public sector perspectives	• Paul Kilby (Glasgow City Region); • Neil MacRae (Hitrans); • Sadha Fathima & MottMac team (Ayrshires); • Bob Brunton & Ben Fulton (South of Scotland); • Chris Waldron (Transport Scotland); • Panel Q&A
12:45 – 13:45	Lunch	• Buffet & networking
13:45 – 15:15	Private sector perspectives	• Stephen Rennie (Urban Fox); • Andy Mouat (Scottish Power); • Anthony Boyd (Believ); • Panel Q&A
15:15 – 15:40	Afternoon break	• Teas, coffees & networking
15:40 – 16:10	Industry panel discussion	• Chair: Mark Constable (Trojan Energy & ReCharge UK) • Panel: Juliet Flamank (GFI); Adam Turner (PwC); Shayne Rees (char.gy); Richard Lockhart (Burness Paull)
16:10 – 16:25	Closing comments & final thoughts	• Matt Eastwood (Transport Scotland)
16:25 – 16:30	Event close	



Keynote address

Fiona Hyslop MSP
Cabinet Secretary for Transport

Scottish Futures Trust update

Matt Jackson & Alastair Young

Electric Vehicle Infrastructure Fund

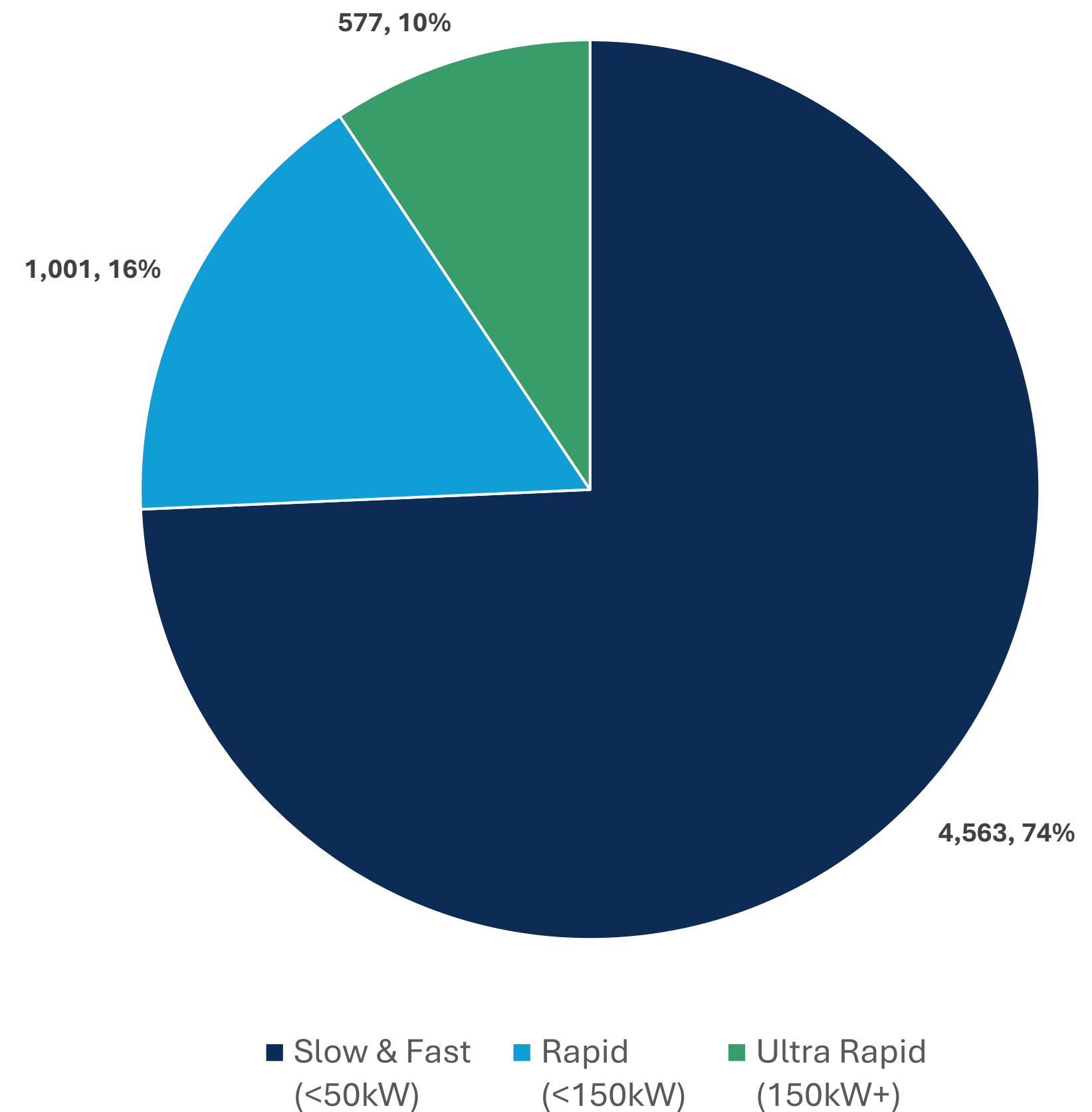
Scottish Futures Trust's Programme
and Project Support

Public EV Charging in Scotland

The Current Landscape

Public Charging in Scotland

- Just over **6,100** charge points – **representing over 11,000 connectors**
- More than **half** (54%) operated by the private sector already, with strong growth in 12-18 months
- **Nearly 3 in 4** of the estate are “slow” / “fast” destination charging



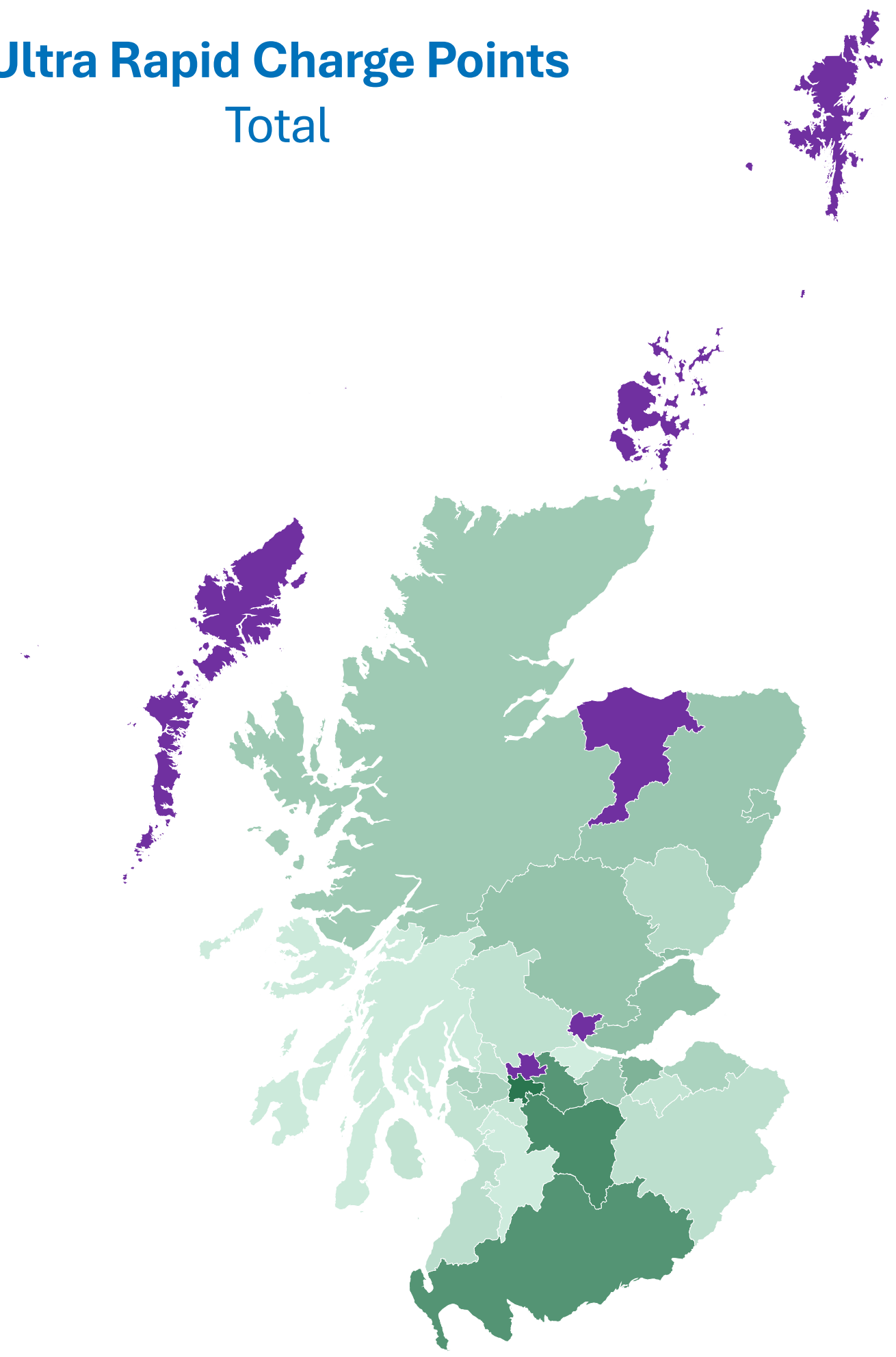
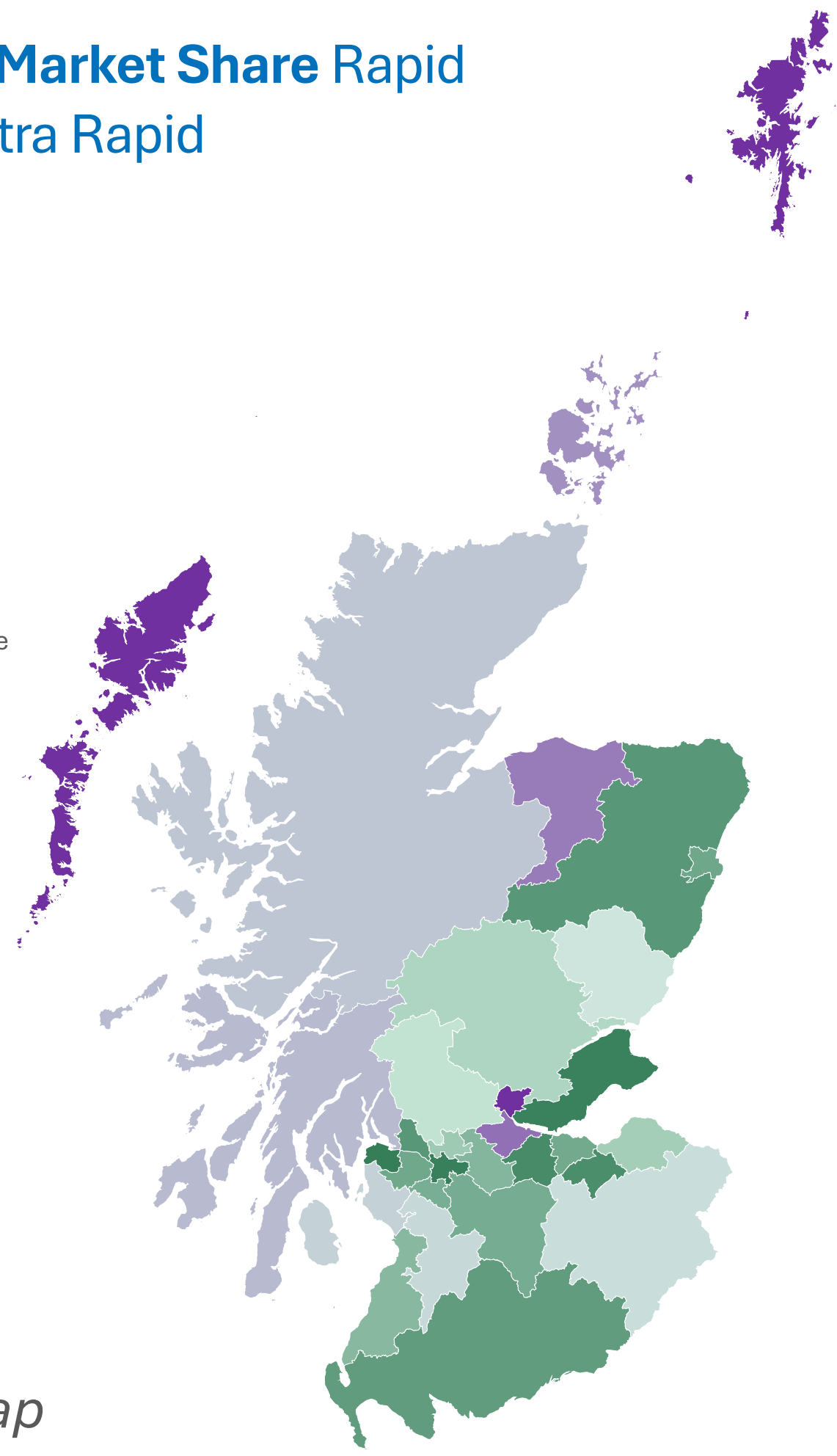
Source: ZapMap, 2nd January 2025

Private Sector Market Share Rapid & Ultra Rapid

Ultra Rapid Charge Points Total

Private Sector Intervention Rate
90%
50%
0%

Ultra Rapid Devices
69
0



Source: ZapMap

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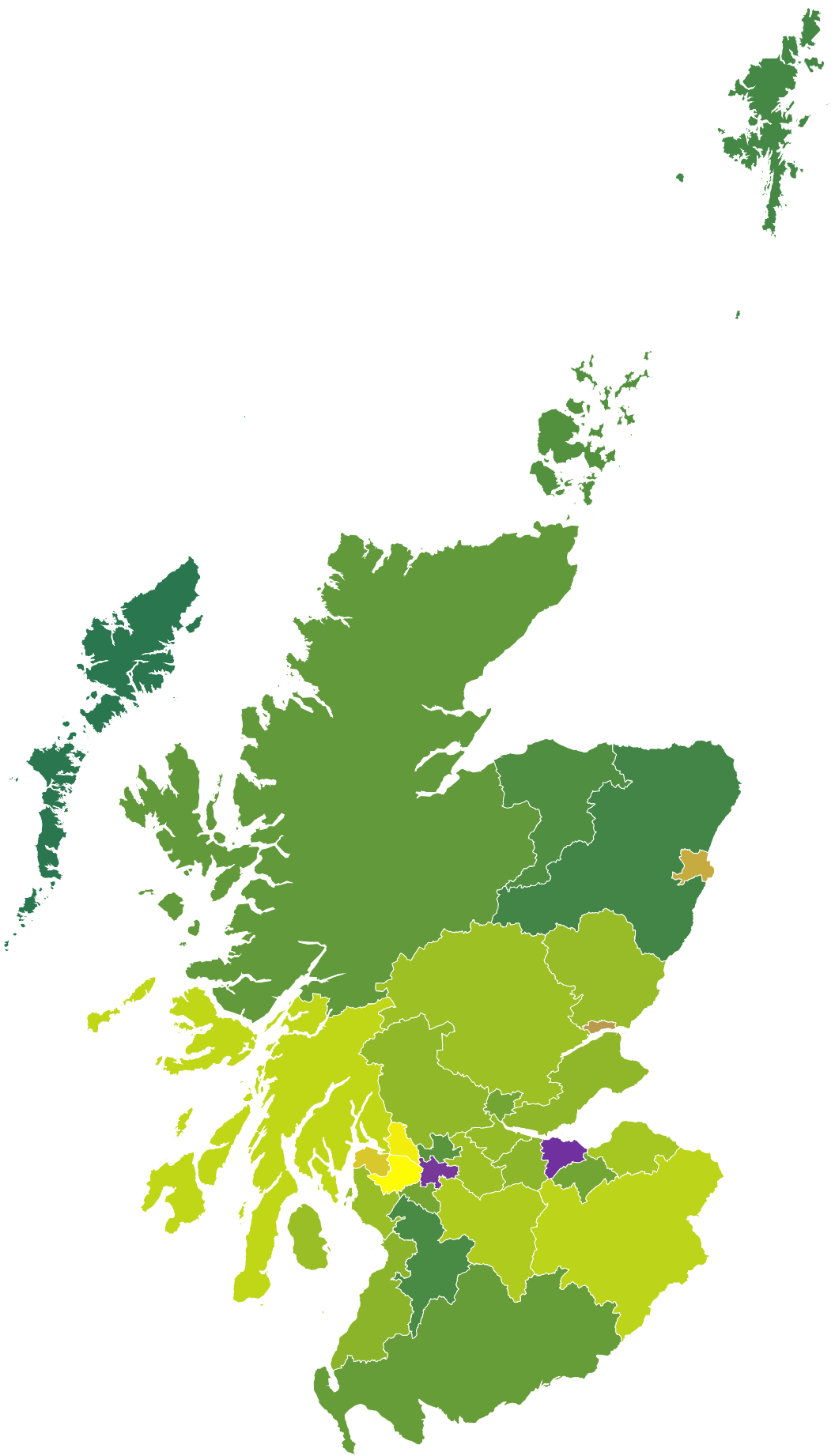
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Households with access to off-street parking

- As low as **1 in 3** in Edinburgh and Glasgow
- Around **1 in 2** across Dundee, Aberdeen and metro area of Glasgow
- As high as **86%** in predominantly rural and island authorities

% Households with off-street parking

86%
61%
36%

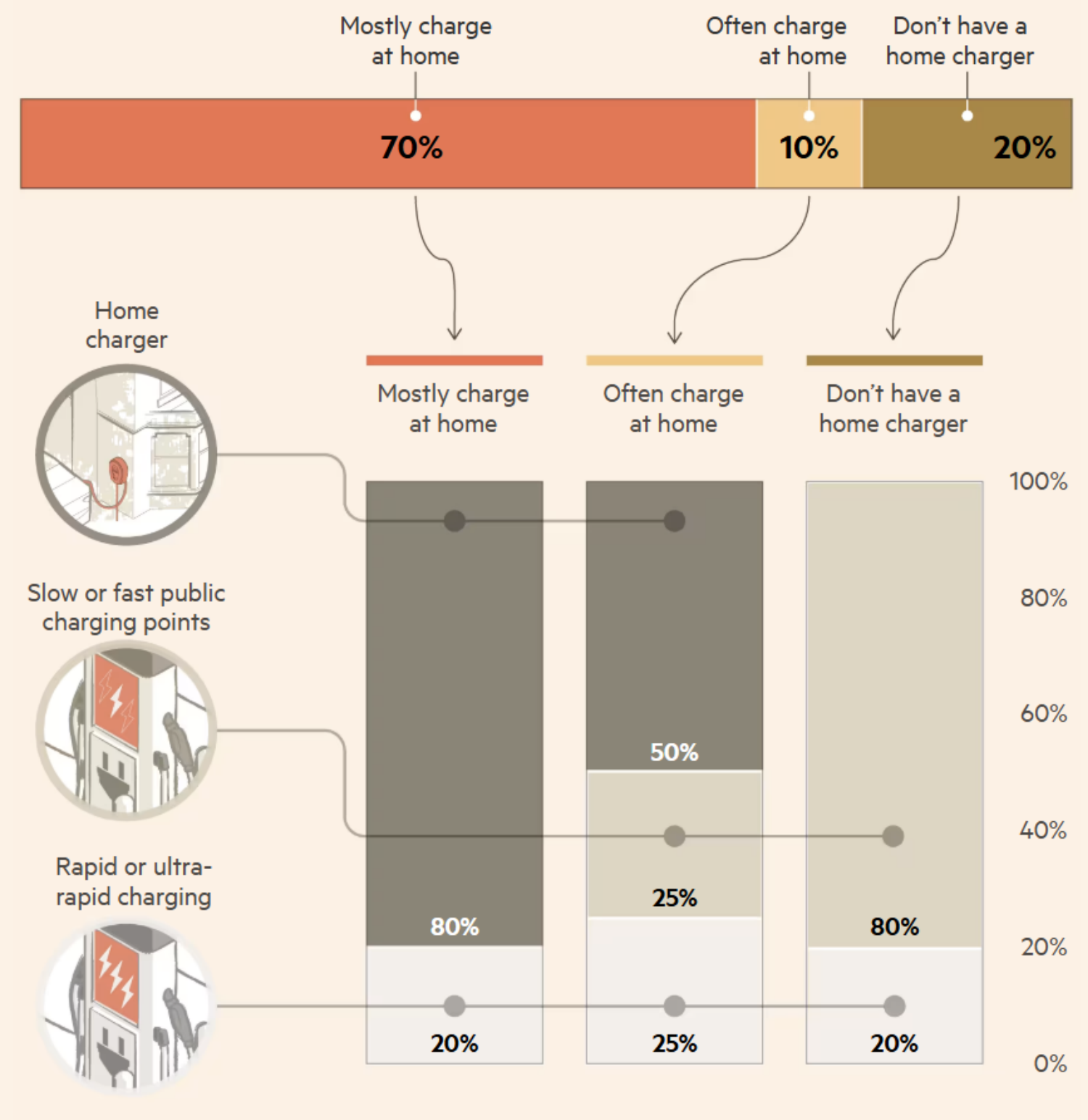


2024 Estimate | Source: Field Dynamics

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The majority of EV owners mostly charge at home . . .

EV owners by charging patterns (%)

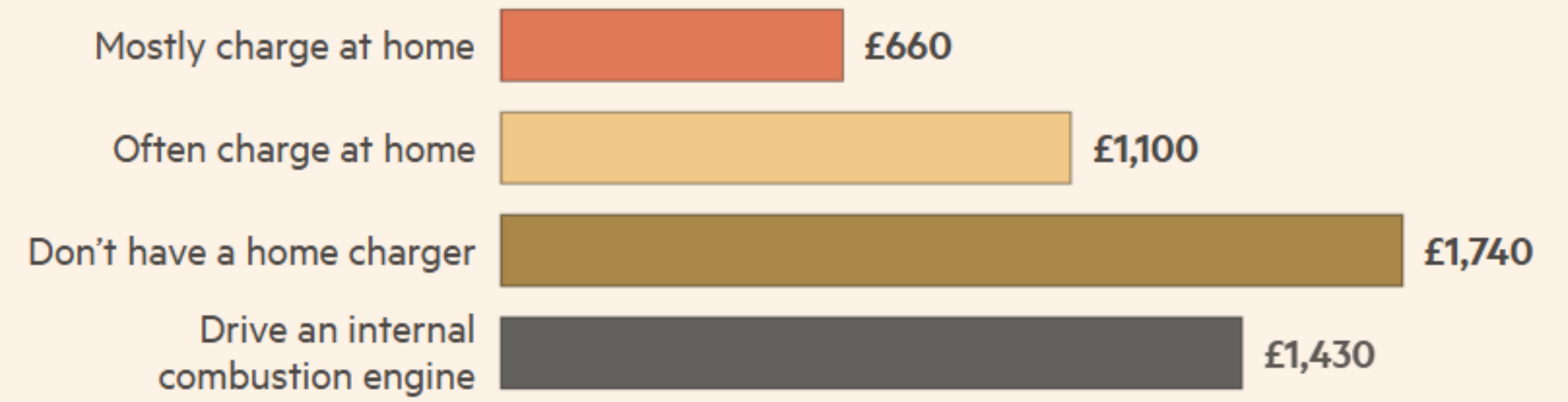


Source: Financial Times, ZapMap

Recognising the role of charging from home

. . . and having a home charger makes it much cheaper to run an EV

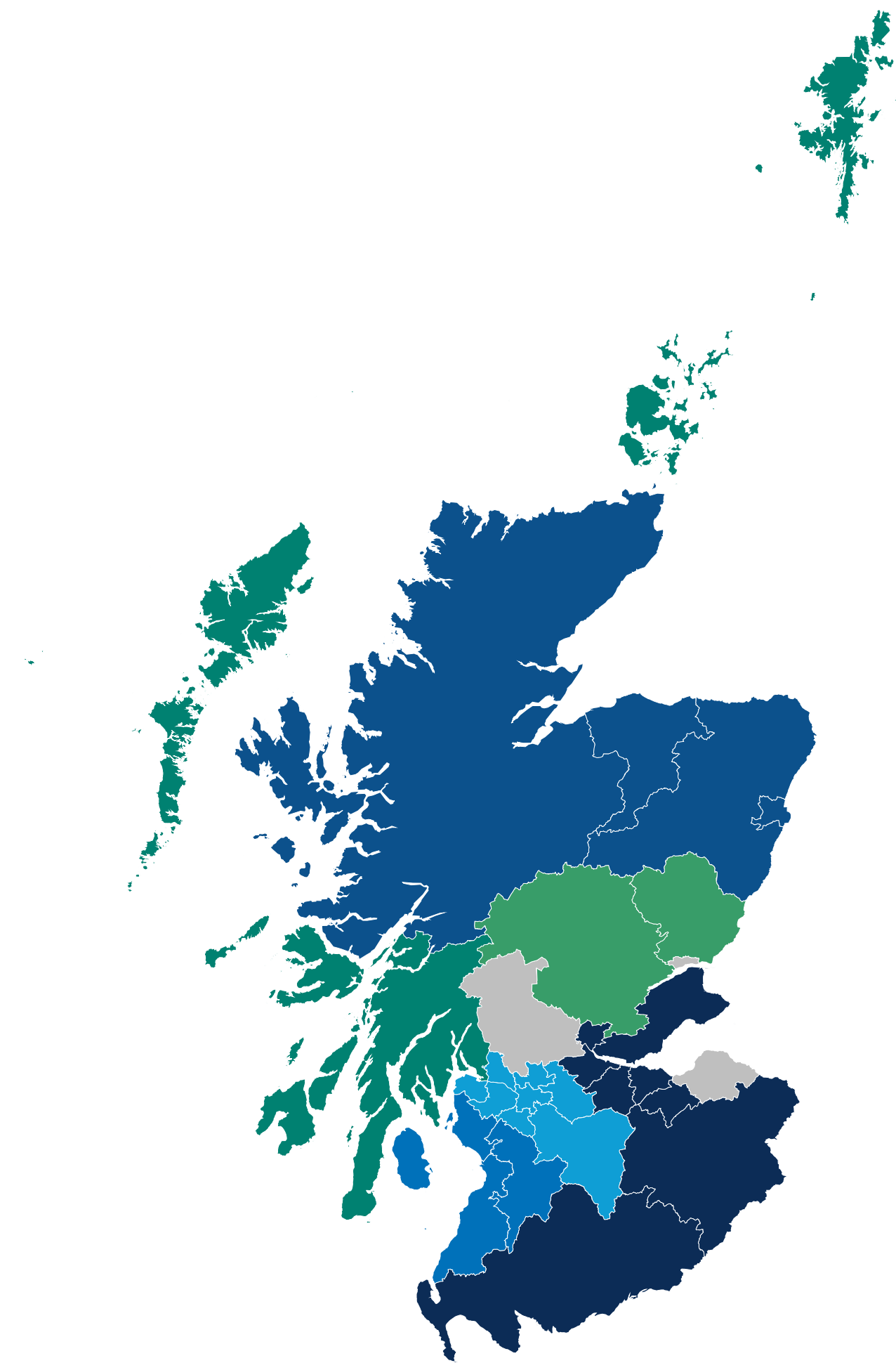
Estimated annual cost (£)



Source: Zapmap, December 2024

Emerging Local Authority Collaborations

- SESTRANS
- Glasgow City Region
- North of Scotland
- Independent
- A&B & HiTrans Islands
- PKC & Angus
- Ayrshires



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EVIF Procurement SFT Local Authority Support

SFT's Local Authority Support



Procurement
Strategies



Evaluation
Criteria



Bid
Deliverables



Project Requirements



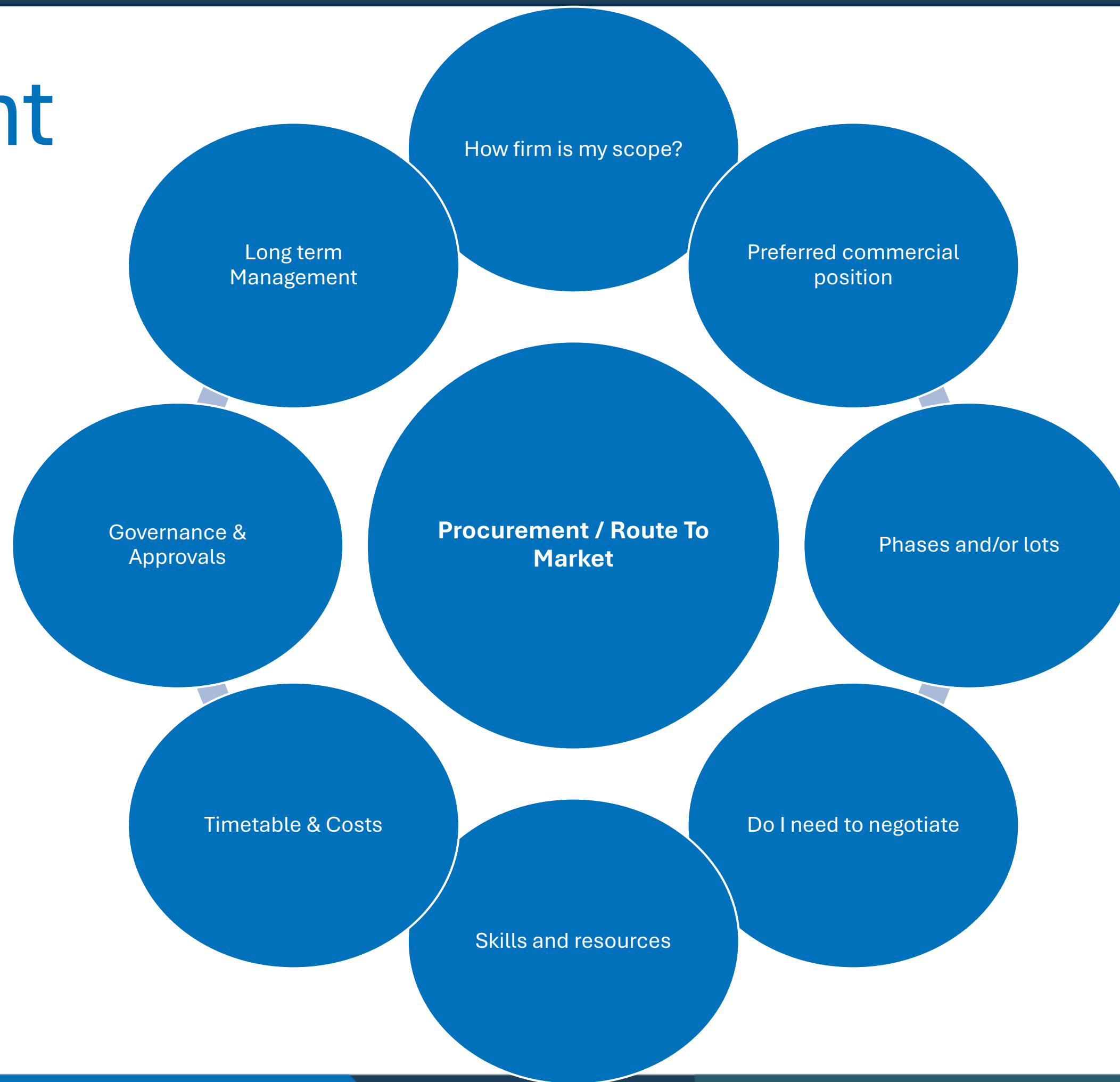
Contract Terms



Joint Working

[Net Zero Transport - Workstreams - Scottish Futures Trust](#)

Procurement



Evaluation Criteria



Quality

&



Price

Specifications & KPIs

NEVIS
DELIVERED BY CENEX

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Procurement Forum

Introduction

Procurement is one of the biggest challenges in delivering local EVI. Research conducted by Cenex in 2022 concluded that LAs experience a lot of difficulties throughout procurement. Setting terms and conditions, knowing what to procure and agreeing Service Level Agreements (SLAs) were the top challenges highlighted.

The following are the current key outputs from the Procurement Forum:

- [Heads of Terms](#) →
- [Technical Schedules](#) →
- [Key Performance Indicators \(KPIs\)](#) →
- [Tender Evaluation \(Concession\)](#) →

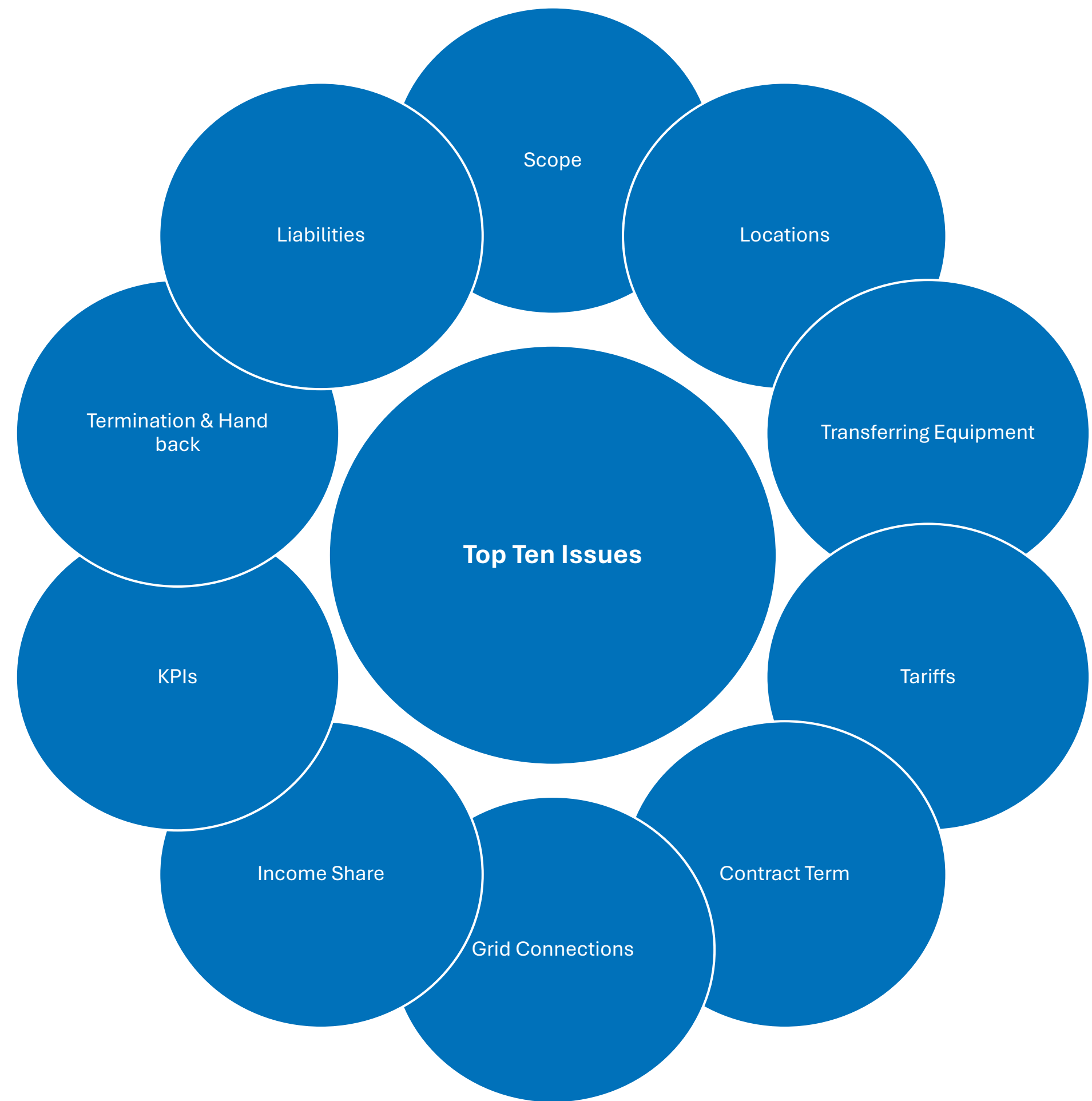
[LEVI Heads of Terms
\(cenex.co.uk\)](https://cenex.co.uk)



Contract Guidance



[commercial-considerations-for-ev-infrastructure-service-contracts](https://scottishfuturestrust.org.uk/commercial-considerations-for-ev-infrastructure-service-contracts)
(scottishfuturestrust.org.uk)



Template Contract

TABLE OF CONTENTS

Clause		Page No.
1	DEFINITIONS AND INTERPRETATION	1
2	CONCESSION PERIOD	7
3	FUNDING	7
4	EQUIPMENT	8
5	LEASES	8
6	INSTALLATION WORKS	8
7	CONSENTS/PLANNING APPROVAL	9
8	SERVICES	9
9	TARIFFS	9
10	CONCESSION FEES	9
11	RECORDS, MONITORING AND REVIEW	10
12	KPI FRAMEWORK AND RELIEF AND COMPENSATION EVENTS	11
13	CHANGE CONTROL	13
14	TITLE AND RISK	15
15	INTELLECTUAL PROPERTY	15
16	PUBLICITY	16
17	PERSONNEL	16
18	INSURANCE	17
19	COLLATERAL AGREEMENTS	18
20	PARENT COMPANY GUARANTEE	18
21	EXIT MANAGEMENT	18
22	LIABILITY	18
23	INDEMNITIES	19
24	CONFIDENTIALITY	20
25	DATA PROTECTION	20
26	CYBER SECURITY	20
27	FAIR WORK	20
28	FREEDOM OF INFORMATION	21
29	COMPLIANCE	22
30	ASSIGNATION AND SUBCONTRACTING	22
31	NO AGENCY / PARTNERSHIP	22
32	NON-EXCLUSIVITY	22

33	NOTICES	23
34	DEFAULT / REMEDIATION	23
35	DISPUTE RESOLUTION	24
36	FORCE MAJEURE	27
37	TERMINATION	27
38	CONTINUING OBLIGATIONS / SEVERABILITY	28
39	WAIVER	28
40	RIGHTS OF THIRD PARTIES	29
41	CAPACITY	29
42	CONTRACT DOCUMENTS	29
43	COUNTERPARTS AND DELIVERY	30
44	GOVERNING LAW AND JURISDICTION	30
	PART 1 – PAYMENT MECHANISM	32
	PART 2 – DETAILS OF EXISTING EQUIPMENT	32
	PART 3 – HANDOVER PROCESS	32
	PART 4 – SPECIFICATION OF NEW EQUIPMENT	32
	PART 5 – LIST OF SITES	33
	PART 6 – SITE PLANS	33
	PART 7 – TEMPLATE LEASE	33
	PART 8 – SPECIFICATION OF INSTALLATION WORKS	33
	PART 9 – PROGRAMME	33
	PART 10 – INSTALLATION WORKS PROPOSAL	34
	PART 11 – SPECIFICATION OF SERVICES	34
	PART 12 - KPI FRAMEWORK	34
	PART 13 – SERVICES PROPOSAL	35
	PART 14 – TARIFF REVIEW	35
	PART 15 – REPORTING REQUIREMENTS	35
	PART 16 – RECORDS	35
	PART 17 – RELIEF EVENTS	36
	PART 18 – COMPENSATION EVENTS	36
	PART 19 – COLLATERAL AGREEMENTS	36
	PART 20 – TEMPLATE PARENT COMPANY GUARANTEE	36
	PART 21 - EXIT MANAGEMENT SPECIFICATION	36
	PART 22 – EXIT MANAGEMENT PROPOSAL	37

8 SERVICES

- 8.1 The Concessionaire will carry out the Services:
- 8.1.1 in accordance with all Necessary Consents
 - 8.1.2 as specified in Part 11 of the Schedule; and
 - 8.1.3 from [●] to the standard set by the KPI Framework in Part 12 of the Schedule.
- 8.2 The Concessionaire’s proposal as to how they intend to carry out the Services is set out in Part 13 of the Schedule. The Concessionaire will carry out the Services in accordance with this proposal but, where there is any conflict between Part 11 or Part 12 of the Schedule and Part 13 of the Schedule, Part 11 and Part 12 of the Schedule will take precedence.
- 9 **TARIFFS**
- 9.1 For the first year of the Concession Period, the Tariff will be [●].
- 9.2 The Tariff for each subsequent year of the Concession Period will be set in accordance with the process set out in Part 14 of the Schedule.
- 10 **CONCESSION FEES**
- 10.1 In consideration of the provision of the Services by the Concessionaire in accordance with the terms and conditions of this Agreement, the Authority hereby grants the Concessionaire the right to exploit the Services.
- 10.2 The Concessionaire will pay the Concession Fee and the Revenue Share to the Authority in accordance with the terms and conditions set out in Part 1 of the Schedule.

Commented [BurnPaull15]: Drafting Note
 Authorities should consider the date on which the KPI Framework starts to apply. This could perhaps be the Handover Date or on completion of the Installation Works.

Commented [BurnPaull16]: Drafting Note
 This Clause has deliberately been left minimal as this is a commercial point for each Project. Part 14 of the Schedule should state the tariff regime for AC and DC charging. It may also include details of:
 - connection fees
 - flexible tariffs
 - overstay fees (and their enforcement).
 In developing provisions, consideration should also be given to the tariff review protocol and section 3.4 of the commercial insights paper.

“Necessary” means the licences, permits, regulations and consents necessary from time to time for the performance of the Installation Works and the Services including, without limitation, all planning permissions;

“New Equipment” means the [A/a]bove [G/g]round [E/e]quipment to be provided by the Concessionaire for the purpose of the Services as specified in Part 4 of the Schedule;

“Offer Letter” means the letter from the Scottish Ministers, acting through Transport Scotland, to the Authority dated [●] which sets out the terms and conditions for the payment of the Capital Grant to the Authority;

“Parent Company” means [●];

“Party Representative” means, in the case of the Authority, [●] and, in the case of the Concessionaire, [●];

“Procurement Documents” means the [Contract Notice dated [●] with reference [●] and the associated Invitation to Tender and the Concessionaire’s submission dated [●];

Joint Working & Contract Management

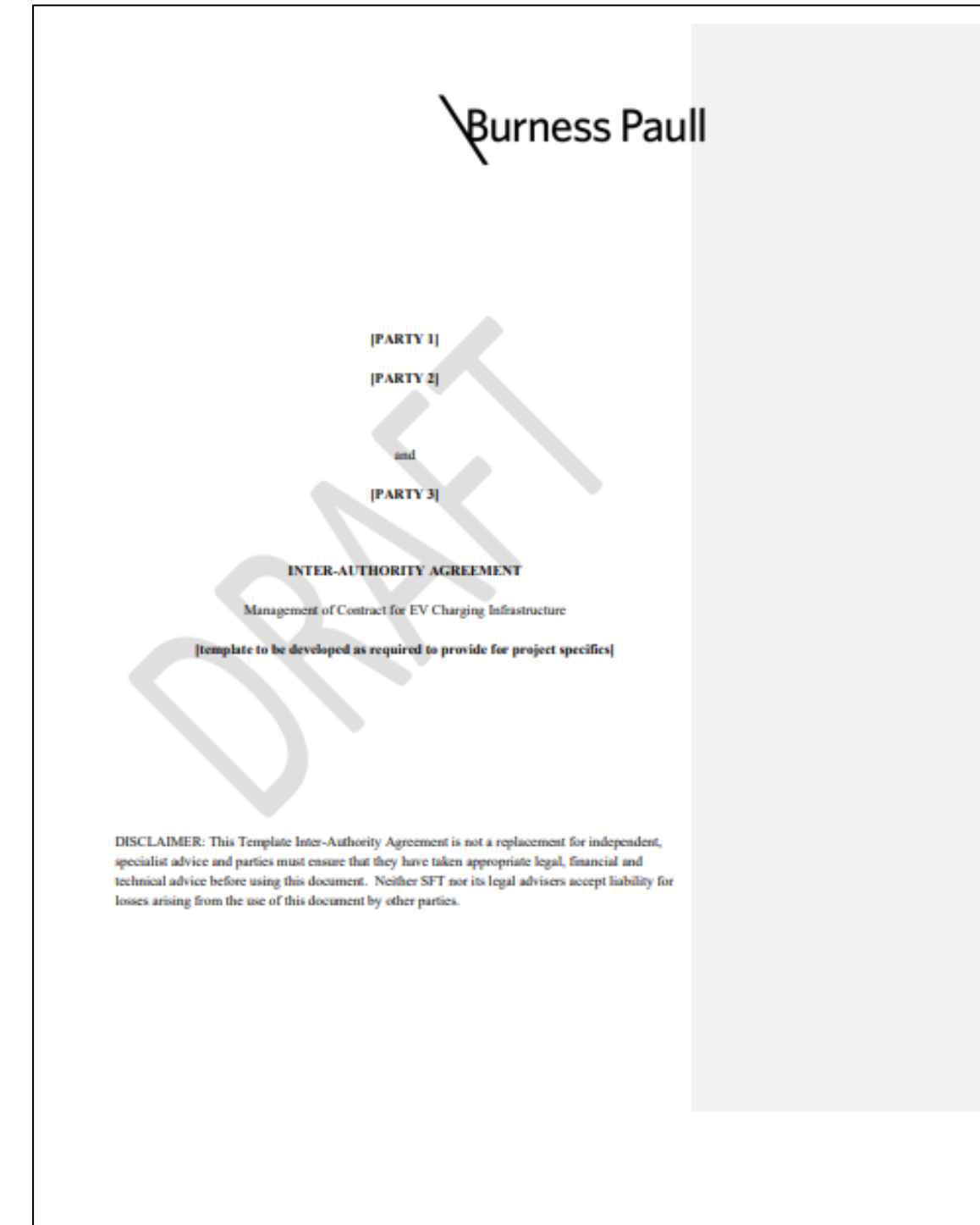
Role of the lead authority

Delegated and Reserved Matters

Income/Cost Sharing

Project Management

Withdrawal & Termination



Thank You

Morning break

See you back here at 11:15 for
'Public sector perspectives'

Public sector perspectives

Glasgow City Region Electric Vehicle Infrastructure Programme

Scotland's EV Charging Future
Wednesday 29 January 2025

Paul Kilby
Regional Partnership Manager



Agenda

- 01** — Glasgow City Region – Background
- 02** — Key Milestones – Progress to Date
- 03** — Governance
- 04** — Key Considerations & Scale
- 05** — Procurement
- 06** — Conclusion



Background - Glasgow City Region



Background - Glasgow City Region



1.84
million people

Approximately 1/3 of
Scotland's total
economic activity.



596

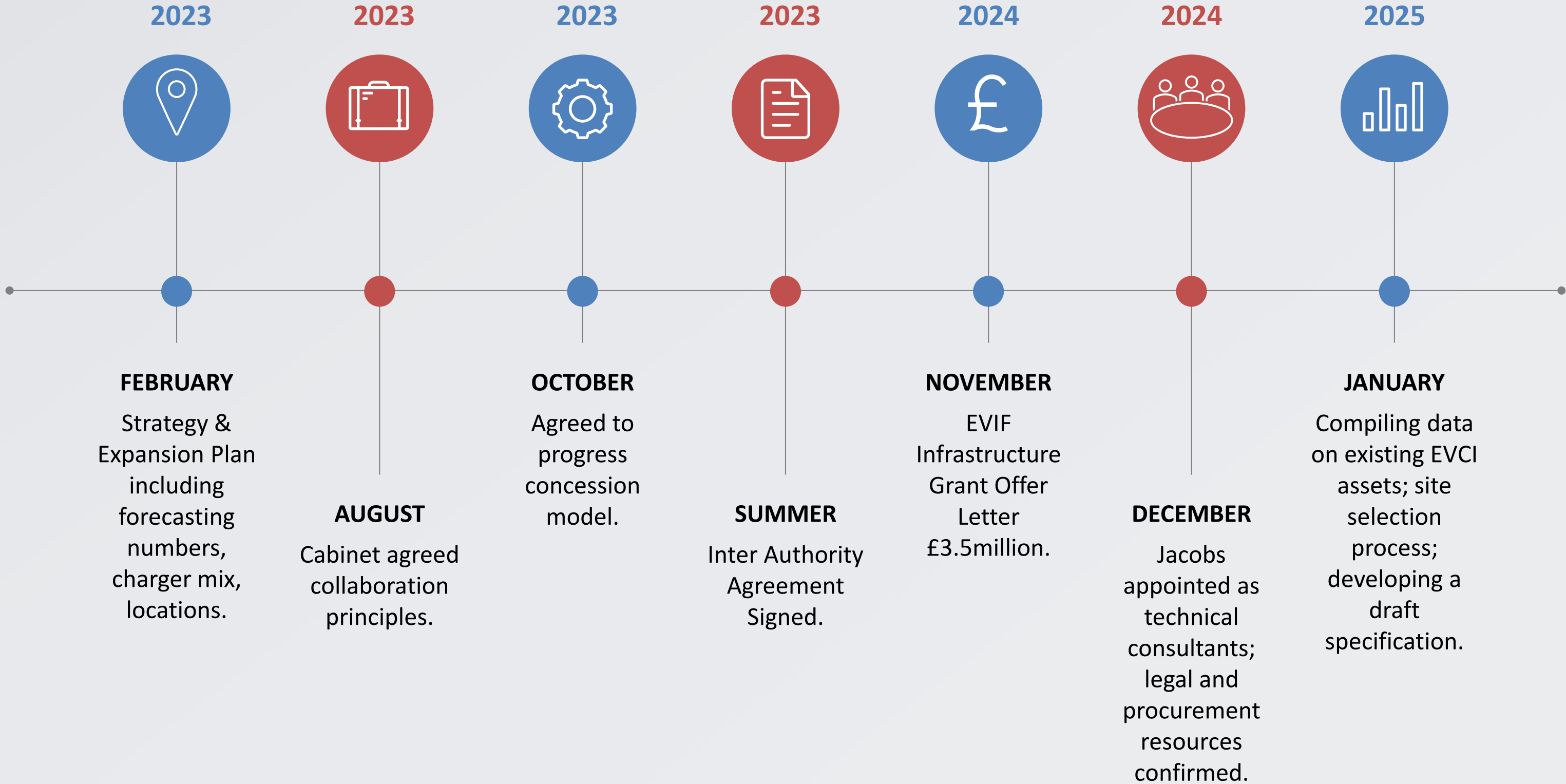
Local authority
owned EV
charge points.



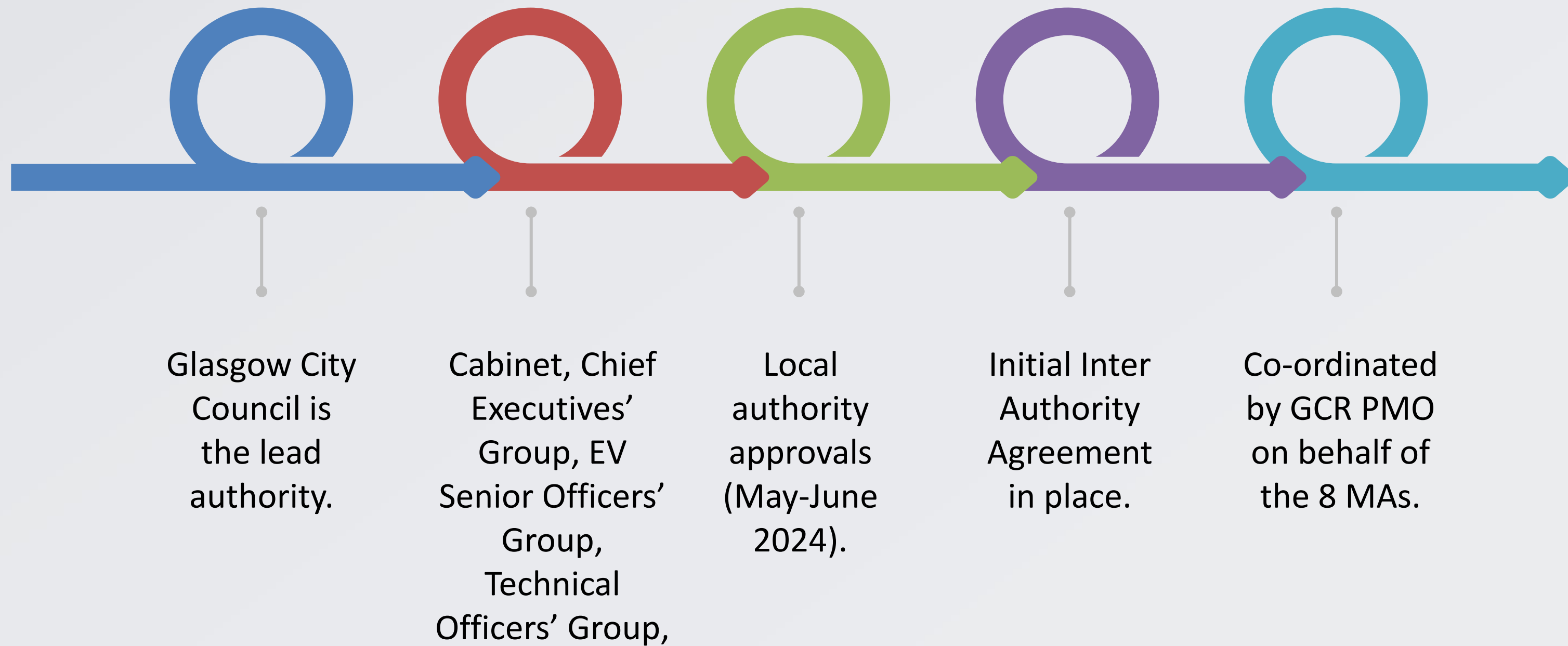
850,000

Approx dwellings
in GCR.
49% with
Off-Street parking
ERC Highest 82%
GCC Lowest 34%

Progress To Date – Key Milestones



Governance



Key Considerations under review

Concession
Service Contract
with a single
CPO

Turnkey Service
including back
office, support
services and
maintenance.



Proposed Contract
Period - 18 years
with possible
option to extend
for 2 year.

Commercial Model
Revenue
share/income
[to cover robust
contract
management costs
as a minimum]



Anticipated Scale

Charger Power Output	Number (Based on SEP & SFT Model)
Destination AC (7-22kwh)	1,345 - over 492 locations
Rapid DC (50kwh)	262 - over 195 locations
50% of residential charge points (7kwh)	1636 - over 762 locations
Existing Local Authority Owned EV Chargers	596 chargepoints

***Note:** Site selection process is revisiting the number, location and charger type.

Procurement

- Glasgow City Council – Corporate Procurement Unit appointed to lead on behalf of all 8 Local Authorities.
- Contract title: Managed Service for Publicly Accessible Electric Vehicle Charging Infrastructure (Consisting of Supply, Installation, Upgrade, Maintenance and Back Office and Support Services).
- **Contract Reference:** GCC005902CPU
- Further market engagement planned via Prior Notification Notice (PIN) - anticipated March 2025.

Procurement

- Routes to market being explored are Open or Restricted procedure.
- Tender publication – Aiming for Autumn 2025.
- Procurement will be conducted via Public Contract Scotland portal.
- Interested bidders are recommended to register on the portal.
- <http://www.publictendersscotland.publiccontractscotland.gov.uk/>
- Glasgow City Council's procurement contact is:
Mrs Raji K Purba – raji.purba@glasgow.gov.uk

Conclusion



Working closely with Scottish Future Trust & Transport Scotland.



Legal, procurement & technical support in place.



Largest collaboration of local authorities in Scotland.



Thank You.

Paul.kilby@glasgow.gov.uk

Challenges & Opportunities for public charging infrastructure projects in island and rural locations



Photo by David Pickles/Jorro

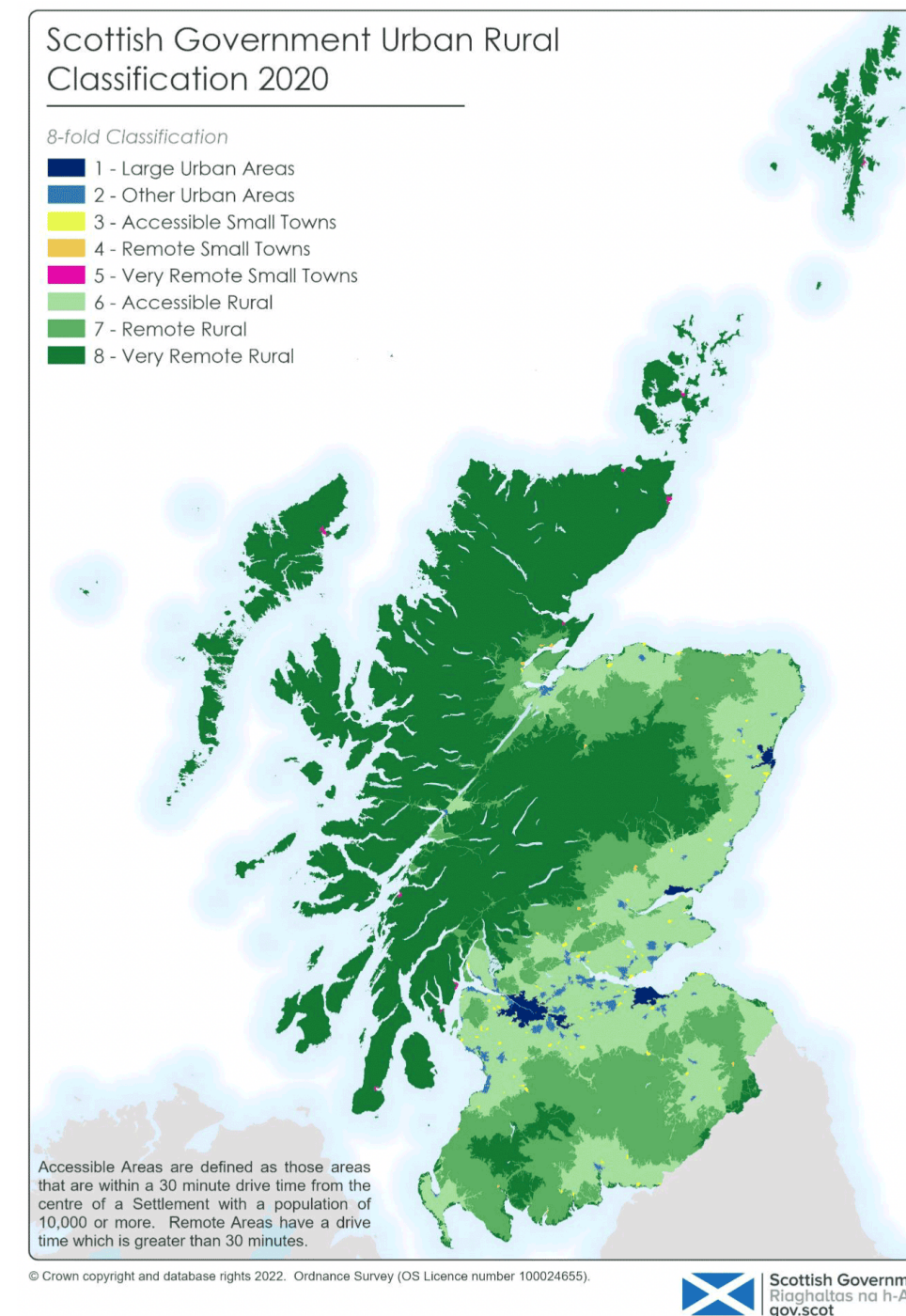
Neil MacRae, Partnership Manager, 29th Jan 2025

HITRANS area



Approx 50% Scotland's landmass
& 10% population (500,000)
Netherlands – same size Pop c18m

Very Remote Rural Areas



Less than 3,000 people, with a
drive time of over 60 minutes to a
Settlement of 10,000 or more

Utilisation



Challenge:

Throughput for ROI not yet reached

Opportunity:

Cross-sector, user and vehicle collaboration required for viability

Challenge:

- Geographical access
- Weathering
- Opex revenue for maintenance
- Digital connection
- Public Charge Point Regulations

Opportunity:

- Local servicing
- Communication plans
- Clear regulatory guidance



Energy Supply Challenges

Connection



Source and Cost

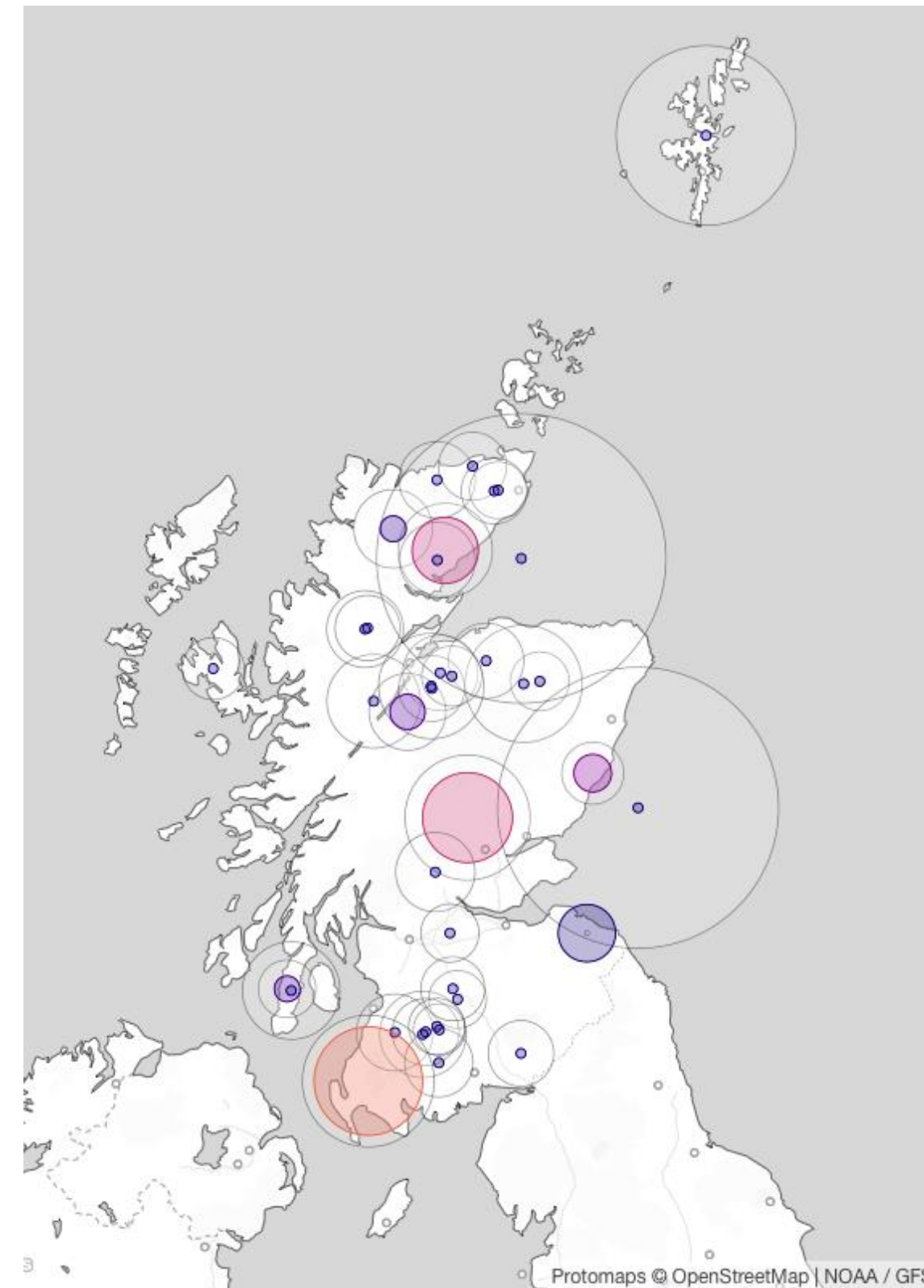


Image by Robin Hawkes/Octopus

Energy Supply Solutions

AWEnergy's Checkley Wood charging site



Orkney as a microcosm for managing peak demand

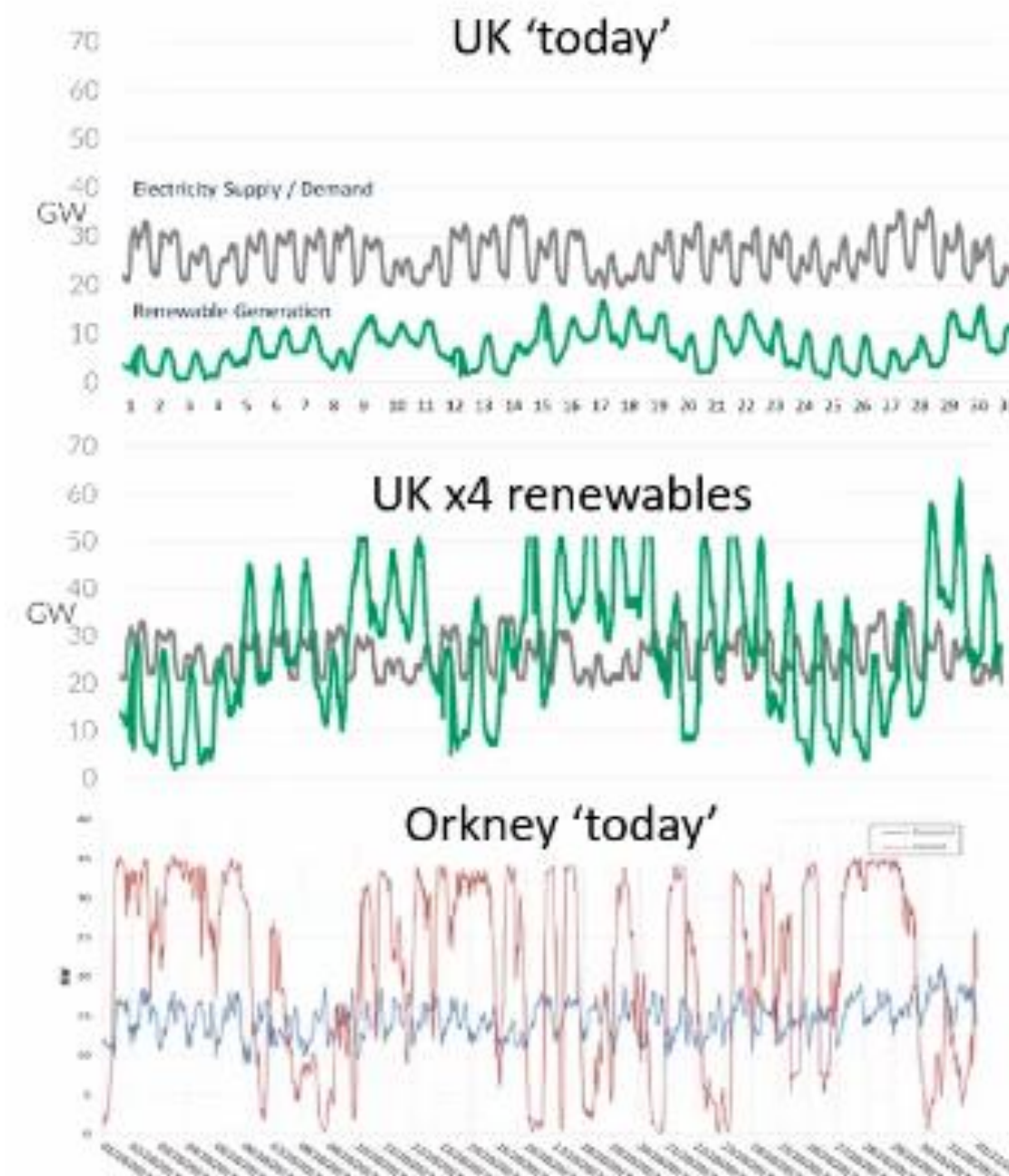
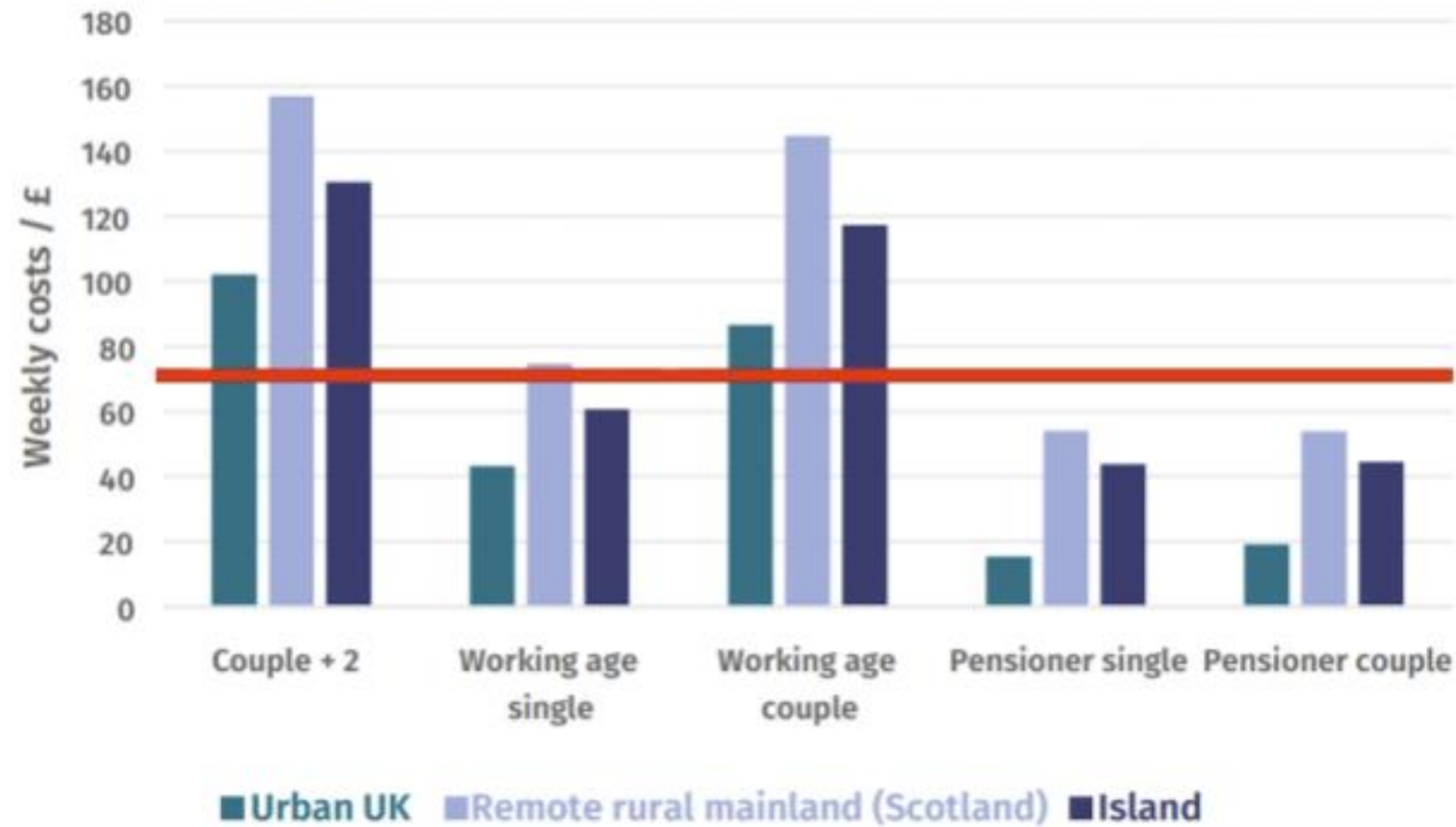


Image by John Fairlie/ASEnergy

Image by Gareth Davies/Aquaterra

Weekly transport cost by household type and by location



Average of £69



Collaboration

- Island and rural solutions need collaboration and innovation
 - Multi-modal low carbon transition
 - Air: SATE – Sustainable Aviation Test Environment
 - Ferry: Small Vessel Replacement Programme (SVRP)
7 new electric ferries



Summary

Challenge	Opportunities
Low utilisation	Collaboration
Reliability	Local Maintenance
Energy Supply	Energy transition solutions (Local Supply, BESS, etc)

Aligning with National, Regional and Local Policy & Objectives

- Net zero emissions targets.
- Delivering on 20% car km reduction route map while moving away from our reliance on cars for everyday journeys, regardless of their mode of propulsion.
- EV Infra Strategy (2022) – Network accessible for all
- Scottish Islands Plan (2019) importance of adequate infrastructure & quality transport networks

North West Scotland EVCI Programme

Phase 1, 2025:

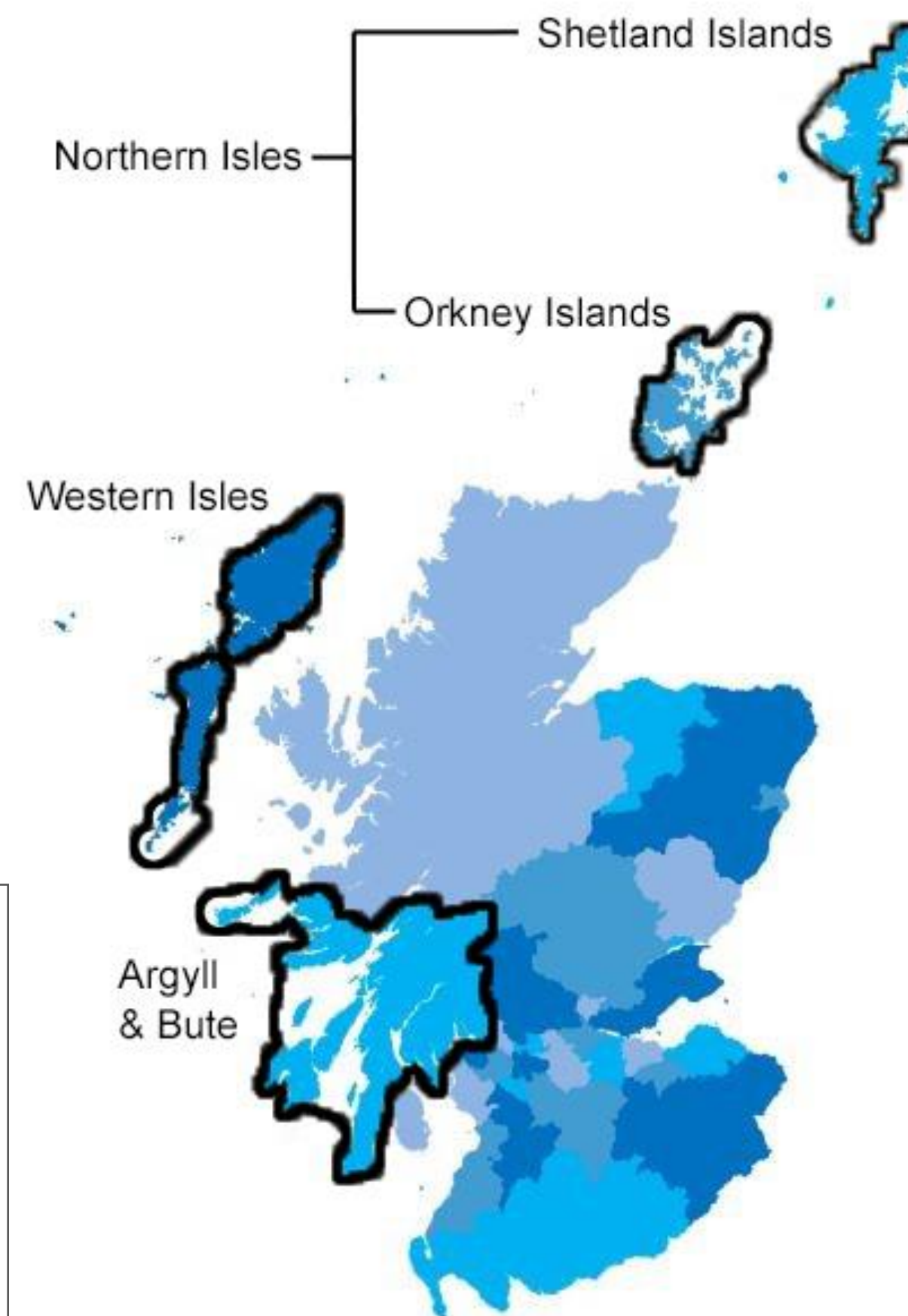
Update and de-risk existing portfolio in line with PCPRs and 3G & CPS shut down

Phase 2, ongoing:

Develop network expansion to address some of these challenges and attract private investment

Thank you...

neil.macrae@hitrans.org.uk
gemma.robinson@hitrans.org.uk



M
M
MOTT
MACDONALD



AYRSHIRE EV CHARGING INFRASTRUCTURE PROGRAMME

Scotland's EV Charging Future
29 January 2025



AGENDA

- 1 Who are we?
- 2 What is the project?
- 3 What has been done to date?
- 4 Procurement
- 5 Contractual terms

Who are we?



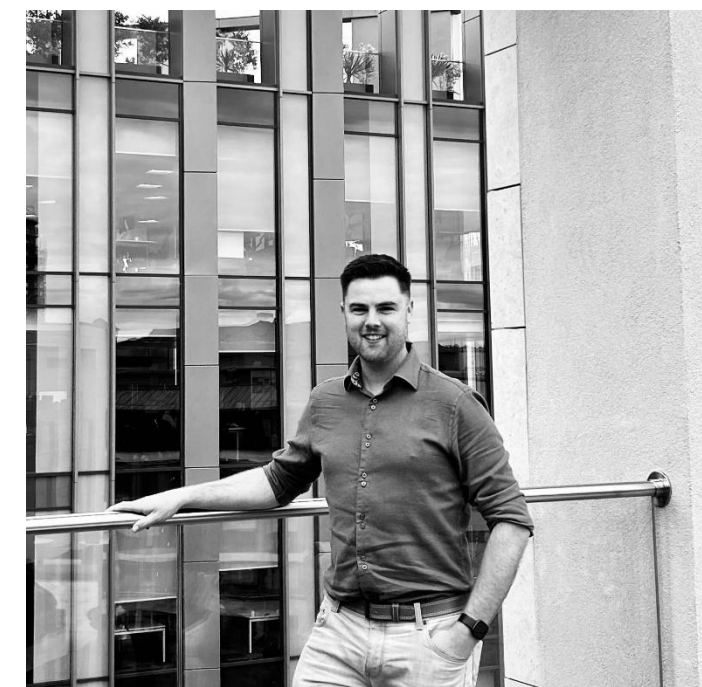
Sahda Fathima
**Project Officer – EV
Charging**
Ayrshire Roads Alliance



Adam Golden
Project Manager
Mott MacDonald



Sandra Barletti Salas
Senior Economist
Mott MacDonald



Mark Harrison
EV Technical Lead
Mott MacDonald

What is the project?

Who?

East Ayrshire Council
North Ayrshire Council
South Ayrshire Council

Where?

Ayrshire (covering East, North and South Ayrshire), south-west Scotland.

How?

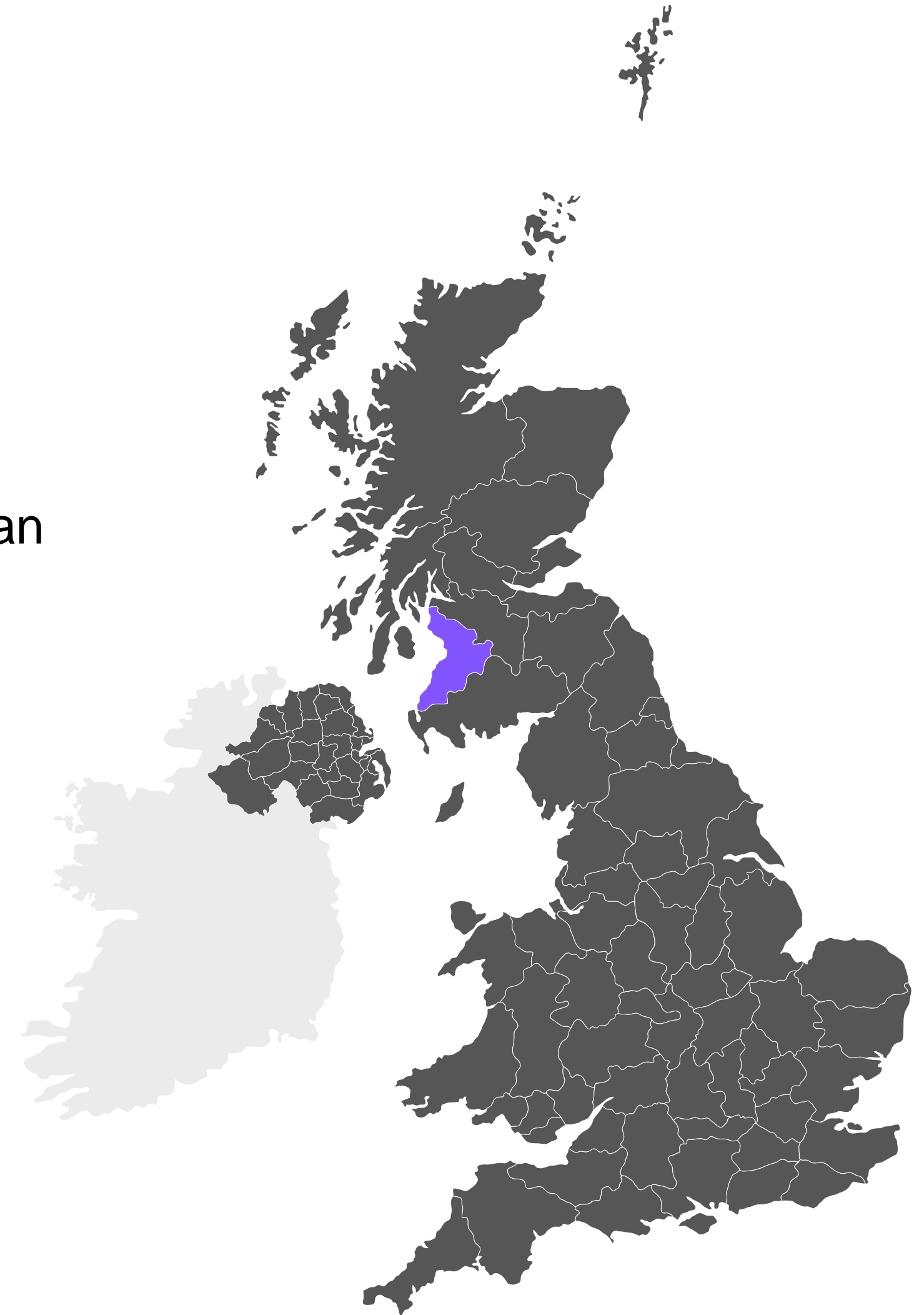
20-year concession contract

What?

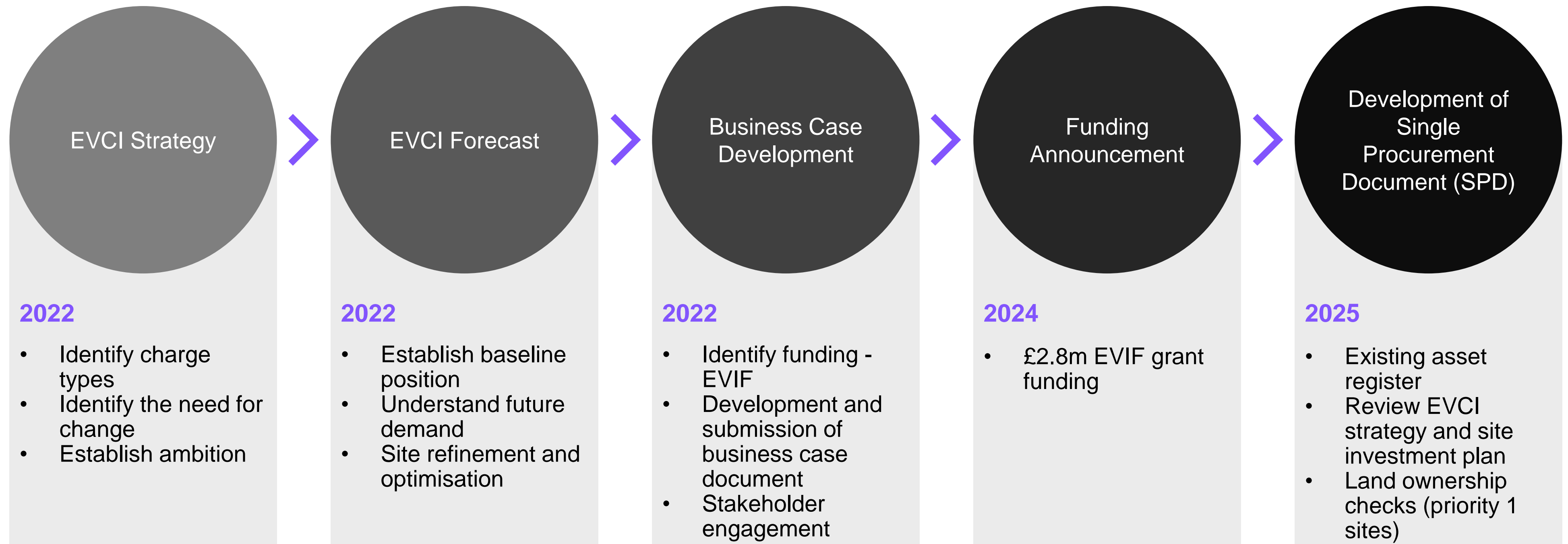
Expansion of the existing EV charging network, by more than 270 site locations.

Why?

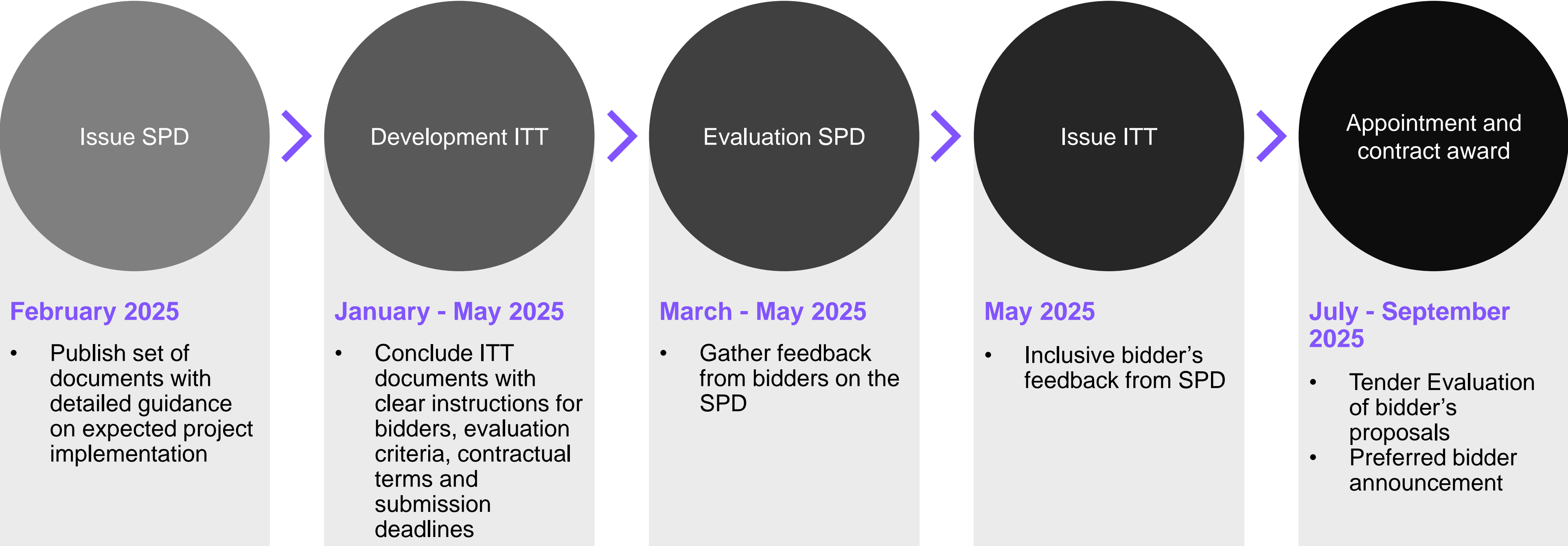
Meet future EVCI needs and ensure a just transition for a socio-economically and geographically diverse area.



What has been done to date?



Next steps



Procurement

Headlines

Investment Costs

Secured Public Investment - £2.8m

Minimum Private Investment Required - £2.1m

Minimum Total Investment - £4.9m

Governance & Approval

Lead Authority - **East Ayrshire Council**

Supporting Authorities – **North Ayrshire Council**
South Ayrshire Council

Supporting Inputs – SfT & Transport Scotland

Procurement Team & Advisors

East Ayrshire Council
North Ayrshire Council
South Ayrshire Council
Mott MacDonald

Current Timetable

February 2025: SPD (pre-qualification)

May 2025: ITT

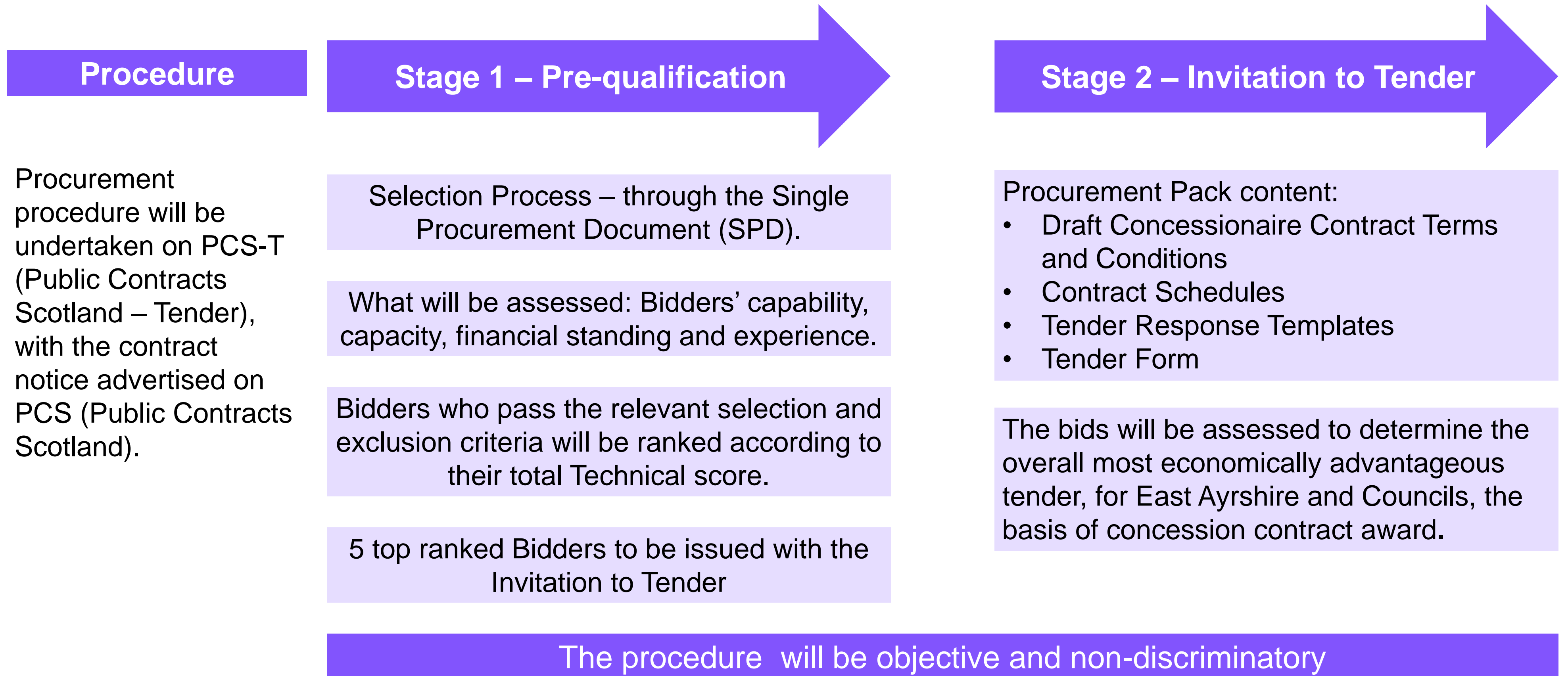
October 2025: Contract Award

December 2025: Asset Migration

Installation Period: Three years

Procurement

Process: 2-Stage Restricted Procedure



Procurement

Process

Stage 1: Short-listing criteria (SPD) / PQQ

Combination of:

- Pass / Fail
- Weighted questions

Example Question Areas:

- Organisation legal identity
- Financial information (e.g. Financial standing 2.5x CPO turnover and Financial Ratios)
- Supply chain
- Health and safety
- Quality
- Environment
- Insurance
- Delivery capabilities, Experience and Financial Robustness

Stage 2 – ITT: Quality-price ratio approach



The assessment of proposed **tariff setting** and **revenue sharing** are part of the Quality Criteria No. 2 (**Robustness of the commercial approach & acceptance of key terms**). A financial sustainability assessment will be assessed based on a template provided to the bidders for a 20-years Forecast. This as well as the acceptance to the Concession contract Terms be Pass / Fail

Procurement

Timeline

Stage 1 – Selection

Milestone	Date
Publication of Contract Notice	3 rd February 2025
SPD queries and clarifications deadline	7 th March 2025
SPD submission deadline	18 th March 2025
SPD evaluation and Councils Approvals	19 th Mar to 9 th May 2025

Stage 2 – Award

Milestone	Date
Publication of the Invitation to Tender	12 th May 2025
ITT queries and clarifications deadline	11 th July 2025
ITT submission deadline	21 st July 2025
ITT evaluation period and Councils Approvals	22 nd July – 16 ^h September 2025
Preferred Bidder Announcement	18 th September 2025
Contract Commencement	03 rd October 2025

The above are indicative timetables. The East Ayrshire Council reserves the right to amend the timetables as it considers appropriate.

Allowed period for queries and clarifications.

EV Guidance Available

Key guidance for the delivery of this project

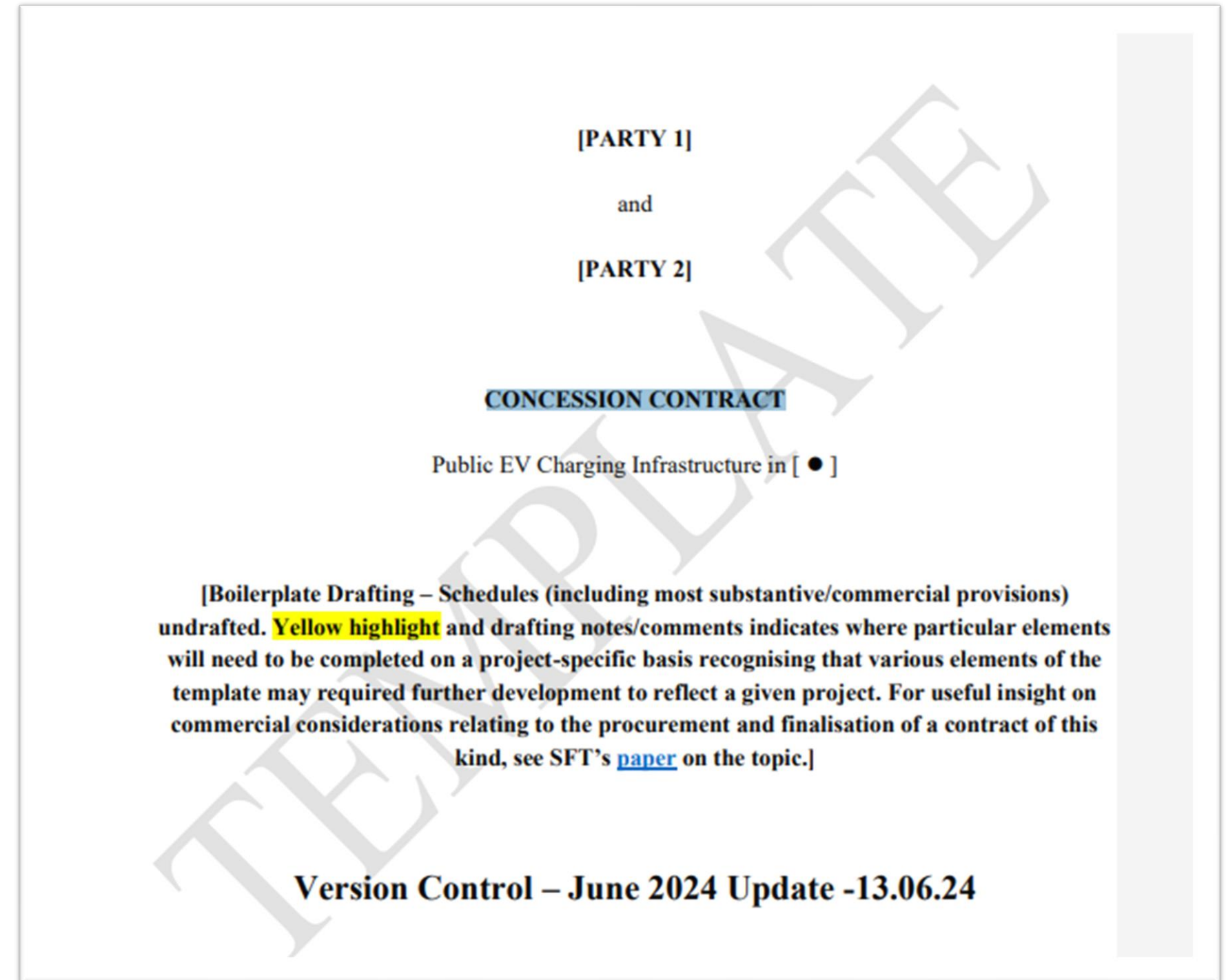
Scottish Futures Trust

- Current and emerging EVIF Project Pipeline
- Template Legal Documents
- EVIF Tariff Review Protocol Draft June 2024
- Concession Contract Template
- Complementary Technical and KPI Guidance

Local Electric Vehicle Infrastructure (LEVI)

- LEVI Guide for Input Specifications and Service Standards
- LEVI Support Body Concession Head of Terms

Engagement with legal, procurement and finance leads to ensure overall alignment of all aspects of the documentation.



Key Contractual Terms

NOTE: Terms may be subject to change and criteria will be published within the tender

CONTRACT TERM

The Contract term is expected to be no more than 20 years. The conditions to grant any extensions will be specified in the Concession Contract.

KEY PERFORMANCE INDICATORS

The list of KPIs will be set in terms of Service Quality, Service Reliability and Service Availability.

SITES

The councils will be willing to consider alternative locations. Additional sites should seek to achieve a regional split and spread across rural, semi-urban and urban.

TARIFF ADMINISTRATION

The Contract will envisage a full control of tariffs by the Concessionaire under a ceiling based on an agreed margin cap in excess of the total cost of energy.

CONCESSION FEE/REVENUE SHARE

Expecting a Concession Fee from over the concession term to cover contract management costs. Bidders will be asked to offer revenue share.

ASSET OWNERSHIP

During the Concession term, the Concessionaire will have full ownership of all local connection assets.

EXCLUSIVITY

Currently anticipating offering exclusivity to the Concessionaire for on-street chargepoint services within the Ayrshire area for the duration of the contract term.

EXISTING ASSETS

The Concessionaire will take over all the Existing Assets that are currently managed. Successful migration of will depend on careful planning and execution of a migration plan.

INSURANCE

The Concessionaire will at all times maintain insurance cover with a reputable insurance company.



**THANK
YOU**

Project Contacts

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Ayrshire Roads Alliance
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Fiona Chan
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Sahda Fathima
Project Officer
Ayrshire Roads Alliance
sahda.fathima@ayrshireroadsalliance.org

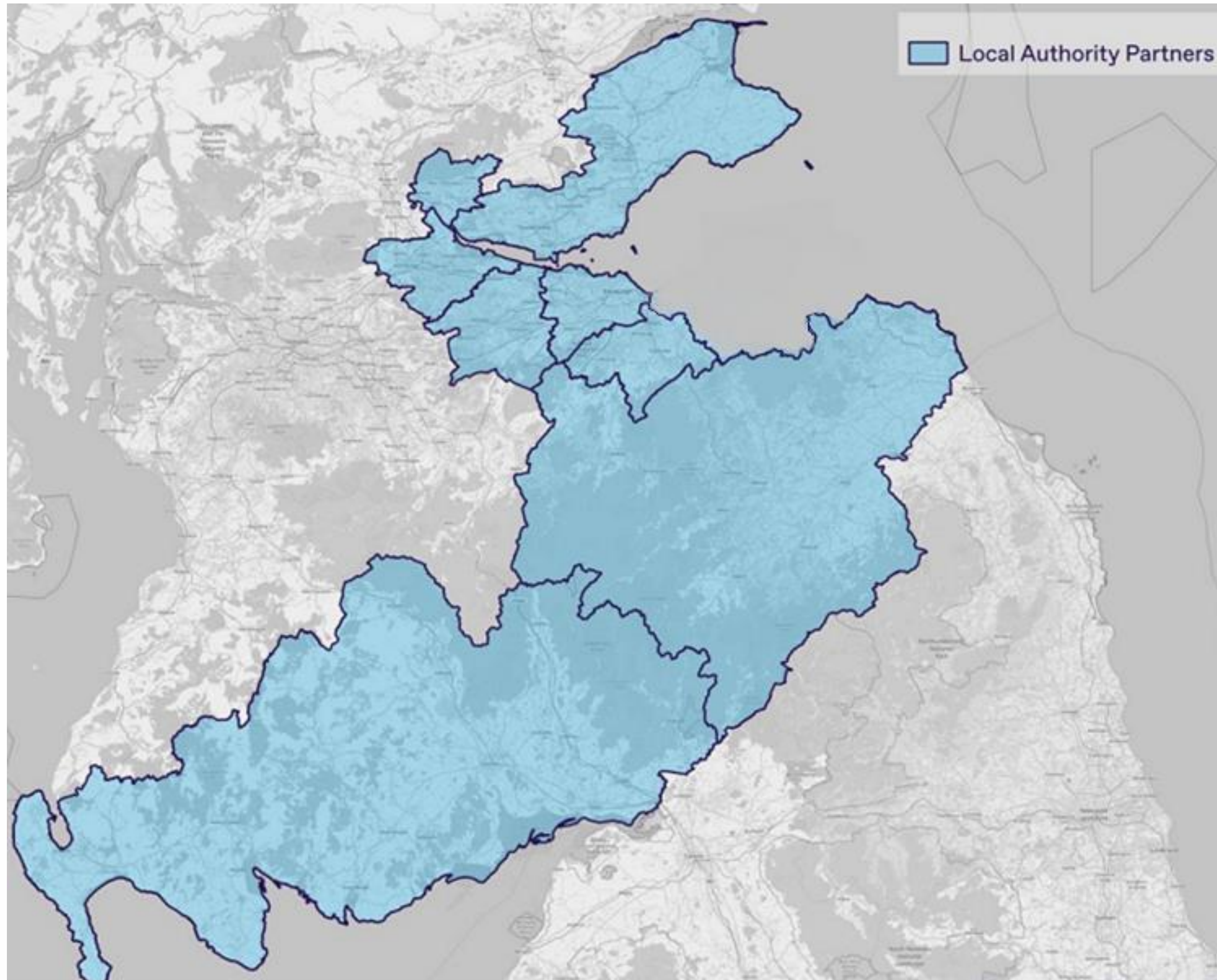
South of Scotland Electric Vehicle (EV) Public Infrastructure Expansion

Bob Brunton – Transport Officer – City of Edinburgh Council

Ben Fulton - Procurement Lead – City of Edinburgh Council

29 January 2025

Regional Partner Local Authorities



- Clackmannanshire Council
- Falkirk Council
- Fife Council
- Dumfries & Galloway Council
- Midlothian Council
- West Lothian Council
- Scottish Borders Council
- The City of Edinburgh Council
(Lead Authority)



Existing Public Network



Local Authority	Total No. existing EVCI	Existing No. AC	Existing Rapid DC
City of Edinburgh	173	145	28
Dumfries & Galloway	183	162	21
Clackmannanshire	36	31	5
Falkirk	85	65	20
Fife	92	81	11
Midlothian	112	108	4
Scottish Borders	27	9	18
West Lothian	35	24	11
Total	743	625	118

743 charge points grant funded by Transport Scotland and on the ChargePlace Scotland network.

Work undertaken to date



- EVCI Asset Registers for each Council updated detailing the existing chargers and type along with;
 - manufacturer information, OCCP status, 12 month utilisation data , maintenance and warranties status.
- Technical specifications document near completion for tender.
- KPI requirements completed for tender process.
- Identification of potential new sites for charge points across all eight Councils.
- SPEN input to the above data to identify capacity constraints and timelines for DNO

Sustainable Growth Opportunity



- On street chargers for Households without offstreet parking in cities, towns and rural communities
- Daily commuters from within the Region
- Commercial Van, Taxi and Uber Drivers



Network Expansion

Pace and scale of EVCI roll-out needs to increase > public sector alone cannot achieve this.

- Scottish Government Vision for the future of public EV charging advocates for the private sector to play bigger role.
- Shift to a more commercially oriented market, focussing public funds on where needed most.
- Local Authorities have a role to help make the transition happen in a timely manner and an appropriate Central Contract Management Team will be in place for start of contract award.

Outcomes

- Public charging infrastructure part of a bigger, better, more competitive and diverse ecosystem.
- Reduction in GHGs and CO2.
- Greater EV adoption
- Accessible, well designed and easy to use EVCI network for all that is commercially sustainable



Network Expansion

Neighbourhood and strategic hubs and on street



Network Expansion



Working with a Charge Point Operator collaboratively

- Safely and effectively managing the delivery of EVCI
- Designing, migrating, installing, and commissioning EVCI across both urban and rural areas
- Reliably operating and maintaining EVCI infrastructure to provide a positive customer experience
- Providing Public Sector Grant Funding to facilitate the rollout of EVCI through private sector investment
- Collaborating with ChargePlace Scotland, Transport Scotland and other partners as part of EVCI rollout

Network Expansion



Initial opportunity for the Private Sector is to further increase public charging provision by 1770 units over the first three years of contract.

Local Authority	Total No. EVCI Planned	No. AC Planned	Rapid DC Planned
City of Edinburgh	464	420	44
Dumfries & Galloway	108	102	6
Clackmannanshire	80	73	7
Falkirk	177	163	14
Fife	228	180	48
Midlothian	167	140	27
Scottish Borders	252	243	9
West Lothian	294	287	7
Total **	1770	1608	162

Gain long term contract providing opportunity for sustainable growth in a growing market catering to the needs of :

Flat dwellers and other households with no offstreet parking

Commercial van and taxi drivers

Daily commuters travelling within the South of Scotland Region

Holidaymakers and business travellers coming to the Region or travelling through.

Funding



Local Authority	Total Investment	Representative grant allocation
City of Edinburgh	£7.60m	£300,000
Dumfries & Galloway	£1.45m	£300,000
Clackmannanshire and Falkirk	£3.87m	£900,000
Fife	£4.85m	£900,000
Midlothian	£3.25m	£900,000
Scottish Borders	£3.68m	£2,100,000
West Lothian	£3.22m	£520,000
Total	£27.92m	£5,920,000

A ubiquitous public charging infrastructure is needed as a first mover and will create business opportunities and revenues for the private sector over time.

Transport Scotland grant application for this collaboration is being finalised and will provide circa £6m in capital to aid the transition to a commercially viable model that provides EVCI to communities across the South of Scotland Region

It is hard to predict the future. Today we have an opportunity to shape it.
With public-private cooperation and the resilience to succeed.



South of Scotland Electric Vehicle (EV) Public Infrastructure Expansion

Regional Planning



- Informed by City Region Deal discussions / agreements
- Scottish Government encouraging regional collaboration of Local Authorities: promoted by Edinburgh City Deal, Scottish Futures Trust & SEStran
- Regional governance developed to progress regional approach: - EV Oversight Group of Directors from partner authorities - Steering Group incl. Transport Scotland (SEStran chairs both).
- Edinburgh has agreed to be the lead authority

Regional approach: benefits



- Time / money savings across the region: procurement, project & contract management
- Ability for all authorities to go to market: insufficient funding for all to go separately
- Pooling of funding received from Transport Scotland: economies of scale
- Competitive bids that support EV charging viability across the region
- Collaborative working resulting in a more integrated regional EV network aiding South of Scotland's economy

Procurement Approach



- Based on feedback from recent PIN and guided by conditions of grant
- Partnership between eight authorities with support from partner agencies
- Procurement and Legal led by City of Edinburgh Council
- Route to market likely to incorporate element of dialogue
- Quality led tender

Future Commercial Situation



- Concession Contract
- Charge Point Operator
 - No cost to the Councils
 - Managed service
 - Revenue to the Councils
 - Long term contract
 - Single contract on behalf of all authorities
 - Contract based on SFT Concession terms

Contract Goals



- Increase AC (standard & fast) charging at on-street locations without off-street parking, and DC (rapid) charging in neighbourhood hubs and strategic locations e.g. P&R sites
- Charging infrastructure provision spread across the region
- Revenue to support the administration
- Minimise costs to users
- Migration away from ChargePlace Scotland
- User friendly, accessible charging infrastructure
- Sympathetic design: conservation/heritage, pedestrians
- Energy management/innovation: smart charging, future proofing
- Seeking other charger provision opportunities: for developments coming through planning system, for car club use, ultra-rapid, lamp columns.

Tender Process



- April 2025
- Competitive Procedure Shortlist
 - Tender
 - Dialogue
 - Final Tender
 - Award
- Anticipated 12 month tender process followed by political approval by respective Council's before contract signature



Selection Award Criteria



- Selection (Shortlisting)
 - Previous experience
 - Capacity



- Award
 - Project Implementation
 - Back Office
 - Customer Service
 - Maintenance and developing of estate
 - Sustainability
 - Fair Work First
 - Community Benefits

South of Scotland Electric Vehicle (EV) Public Infrastructure Expansion

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Transport Scotland

The national transport agency for Scotland

CPS Transition



ChargePlace Scotland – Recap



Established 2011 – a catalyst for public EV infrastructure growth and early adoption of EVs.



£65 million of grant funding to 400+ organisations across public, private and third sectors.



Almost 2,900 public charge points.



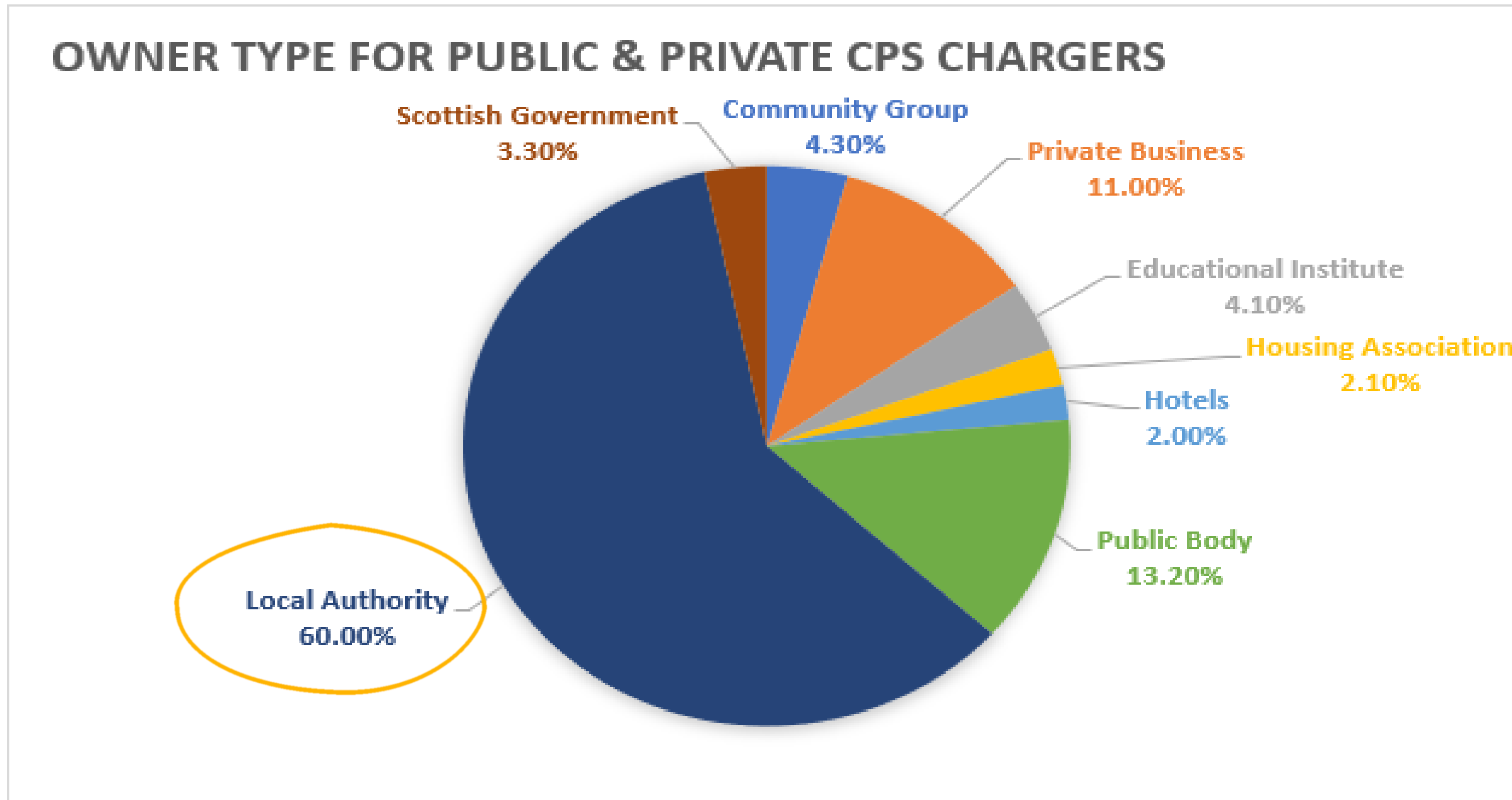
Over 1,500 non-public fleet, business and workplace charge points.



150,000 members.



Ownership of CPS charging infrastructure



CPS – achieved its goals, however...



- Delivered many **benefits**, however there are inherent **challenges** due to structure:
 - Negative impact on commercial market due to low/no tariffs > CMA report 2021.
 - Grown organically, not targeted with a clear strategy.
 - 400+ owners are ultimately responsible for all key decisions.
 - Regulatory environment and emerging best practice raising the bar.
 - Next wave of EV adopters have higher expectations.
- Pace & scale of EVI roll-out must increase > public sector alone cannot achieve this.
- Vision for the future of public EV charging > private sector to play bigger role.

Time is right to shift away from the CPS model



CPS Transition Project



Goals

- Seamlessly migrate 4,500 charge points to multiple CPOs.
- Exit the contract and closedown the service before contract expiry.

Guiding Principles

- Build on what CPS has achieved, using it as foundation for the next stage.
- Drivers will not be impacted.
- Owners' revenues will not be affected during the transition.*
- We will work collaboratively with all charge point owners and their new supplier.

* Not applicable after charging infrastructure has been migrated to a new CPO and is no longer part of the CPS network.



Transition Project – Key Milestones

- Commissioning Freeze - **31 March 2025**
- All charging assets migrated off CPS - **31 Dec 2025**
- Remaining assets migrated - **31 May 2026**
- CPS ceases as a public charging network - **31 May 2026**
- Back-office functions/processes closed - **31 October 2026**

****IF YOU HAVE CONCERNS – SPEAK TO TRANSPORT SCOTLAND AS SOON AS POSSIBLE****



Transition Project – Process & Support



- Engage Transport Scotland *and* CPS as early as possible.
- Familiarise yourself with the guidance material on the CPS owner's hub.
- You will be assigned a dedicated 'Transition Manager' by CPS.
- Obtain your CPS asset information and other data you/suppliers may require.
- Mutually agree an asset migration plan, involving your new CPO, CPS and TS.
- You will be allocated a transition window leading up to 'migration day'.
- Integration testing – your new CPO partner is responsible for this task.
- Post-migration – final closing actions, invoicing, revenue reimbursement etc.



Transition Project – CPS users



How will we ensure a smooth transition for drivers?

- **Communications** approach:
 - CPS will publish details of each migration via CPS website & social media.
 - CPS/TS will not send targeted communications directly to specific drivers.
 - Local Authorities and their *new* CPO are responsible for *local* communications.
 - CPS cannot share the contact details of specific drivers.
- **Interoperability** as an interim solution to help drivers.
 - CPS RFID may continue to work on ex-CPS charge points.
 - Especially helpful for Local Authorities who may phase their migration.
 - Adopting CPO should engage CPS as early as possible to assess feasibility.



Transition Project – Out of scope



- Information **not** handed over to new CPO:
 - Driver/user accounts.
 - RFID database.
 - Historical fault ticket information.
 - Warranty & maintenance info – CPS does NOT hold this!
- Other things to clarify:
 - CPS back-office staff cannot be TUPE'd to new CPO partners.
 - The current CPS contract is very different to the service LA's now require.
 - Transport Scotland's contract with eVolt Charging is only to operate CPS.



Key Points



TRANSPORT
SCOTLAND
Eòran Alba

- Now is the right time to make the **transition**.
- The CPS legacy is a **comprehensive** network and a **seamless** experience for EV drivers – lets build on that foundation.
- Don't forget to plan for the future of your *non-public fleet & depot* chargers too.
- This is complex and nothing on this scale has ever been done before – success can only be achieved if we work **collaboratively**.
- **Engage** with us as soon as possible!



Thank you

Transport Scotland CPS Transition Team

Chris Waldron – Christopher.waldron@transport.gov.scot

Caitlin Tullett – Caitlin.tullett@transport.gov.scot



Public sector perspectives: Panel Q&A

Chair:

Iain MacLeod
Energy Saving Trust

Panel:

Paul Kilby (Glasgow City Region);
Neil MacRae (Hitrans);
Sadha Fathima & MottMac team (Ayrshires);
Bob Brunton & Ben Fulton (South of Scotland);
Chris Waldron (Transport Scotland)

Lunch break

See you back here at 13:45 for
'Private sector perspectives'

Private sector perspectives



urbanfox
ev charging designed for everyone

EST WORKSHOP

**Making contracts attractive to CPOs, learnings
from LEVI, red flags to investors and KPIs**

Balfour Beatty
Investments



urbanfox



Safe pair of hands

Balfour Beatty

Innovation & Experience

- 2023 Chargepoint Manufacturer of the Year (EVIES)
- UK manufacturer of unique flat & flush chargepoint
- Expert team with experience in previous roles of:
 - 60+ combined years of chargepoint deployment
 - Successful chargepoint projects with 65+ UK Councils
 - 8,000+ EVCPs deployed

Security & Proven Leadership

- Strongest balance sheet in the infrastructure sector
- Control of 200,000 street lighting assets
- 100+ years' experience
- Decades of successful concession contracts
- Health & Safety exemplar
- 26,000 staff

“Urban Fox is one of the few companies that I can fully endorse in this sector.”
Fraser Crichton, Dundee City Council (previously Europe’s Most Visionary City on EVs)



Dundee project



What is the ultimate aim

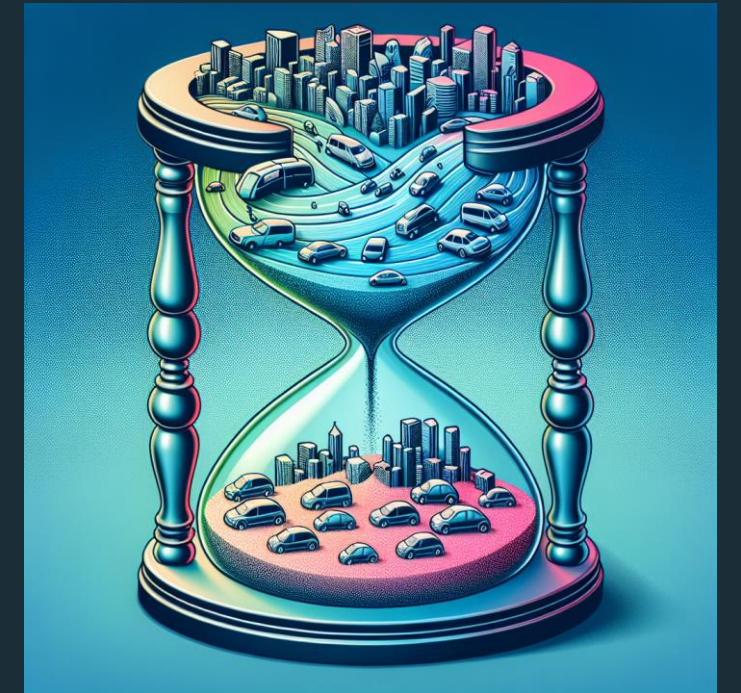
- A reliable, well-maintained network
- A long-lasting, collaborative and successful partnership between the LA and the CPO
- A diligent and risk-averse partner for the LA
- Confidence in 15yr+ delivery

Providing the platform to stimulate wholesale EV uptake for those without homecharger access



The basics (in a tender avalanche....)

- 8-week+ live tender period
- Be realistic on deployment
- Quick clarification responses
- Clear and transparent commercial scoring
- Sufficient word/page count to present CPOs full offering



There is a strong need to make your project an attractive proposition!



LEVI - The Good, The Bad and the Ugly

- 4-week timeframe
- Termination at will
- Cyber Security Event as a Critical Service Failure leading to termination
- 2 x RIDDOR events in 12-months leading to termination
- 1hr Emergency Response, with ONE failure leading to termination
- 30% commercial scoring on overall socket numbers, with 1% quality question on Risk & Capability
- Overall kW of estate being used as a key scoring metric
- Weighting scoring to incentivise the most socket numbers in the quickest timeframes – i.e. “Who is the most unsustainable CPO...”
- 50%/50% commercial and quality scoring (with commercial being socket numbers and revenue share).



The Good, The Bad and the Ugly

- Pre-tender engagement (written, solo and group)
- Pre-release of key ITT detail (for comment) – e.g. sites, contract, KPIs
- 12-week live tender period
- Set margin cap & revenue share
- Mandatory Service Improvement Plans
- 80%+ quality scoring
- No hair-triggers to termination
- Negotiation stage



Incentivising over-deployment and maximum revenue share will only end up penalising the end user



The Clarification Process

- The contract needs to reflect the Council's intentions:
- **Example** – Contract states that Cyber Security Event can lead to termination -> Clarification to request to always have the opportunity to submit a Rectification Plan which would be considered reasonably by the LA - > “it would always be XXX's approach to work with the Supplier to agree such a plan, prior to considering a termination trigger, which would only be considered in extremis.” **BUT WOULD NOT AGREE TO CONTRACT CHANGE**

There are millions of pounds at stake and contracts need to reflect that



Contractual red flags

- Uncapped liability
- Hair-triggers to termination
- Over-ambitious milestone dates and KPIs
- Transfer of full estate to LA in cases of early termination



A successful long-term concession will only work well if the supplier and the local authority both have a balanced risk profile.



Market Value

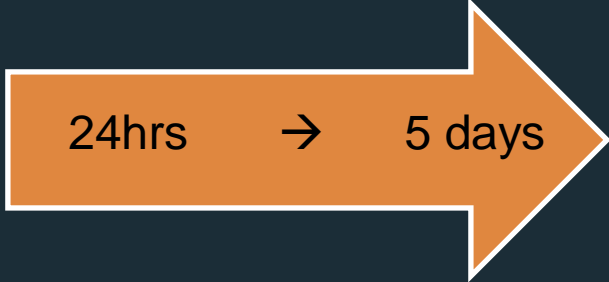
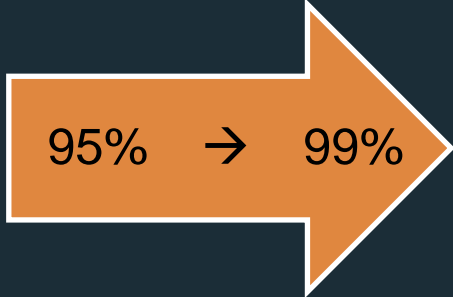
- Should the penalty for missed KPIs/CSFs be the loss of the full investment?
- Without a commitment to Market Value in cases of early termination there is a clear incentive to terminate CPOs
- The inclusion of compensation within early termination still brings penalties and risk to the CPO
- Public Charge Point Regulations = £10,000 fine for network of rapids below 99% uptime.....COMPARED TO.....
- Some LEVI tenders = £Millions for the same level of default

Market Value is a regular inclusion across other industries' Concession Contracts



KPIs and Performance Management

- As a CPO, we will only survive if we provide reliable and well-maintained networks
- Important for LAs to also have a strong framework to ensure this – but KPIs need to be realistic
- Use Service Improvement Plans and do not use KPIs as hair-triggers to termination. Range we are seeing for crucial KPIs:

- Fault rectification:  24hrs → 5 days
- Uptime:  95% → 99%

A strong client and achievable SLAs is essential



New Procurement Regs

- Competitive Flexible Procedure, with encouragement of:
 - Commercial dialogue
 - Negotiation/BAFO
 - Supplier presentations



Additional time at the procurement stage will bring huge value across the contract term



Summary

- There is significant investment capital available
- There needs to be a balance of risk between the CPO and the LA
- Give due time to the process and share best practice
- Talk to CPOs
- Ensure you have a long-term, sustainable investor – beware the risk-taking CPO

We're happy to share our experience at any stage



Get in touch

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Andrew Mouat – Head of Smart Mobility (ScottishPower)

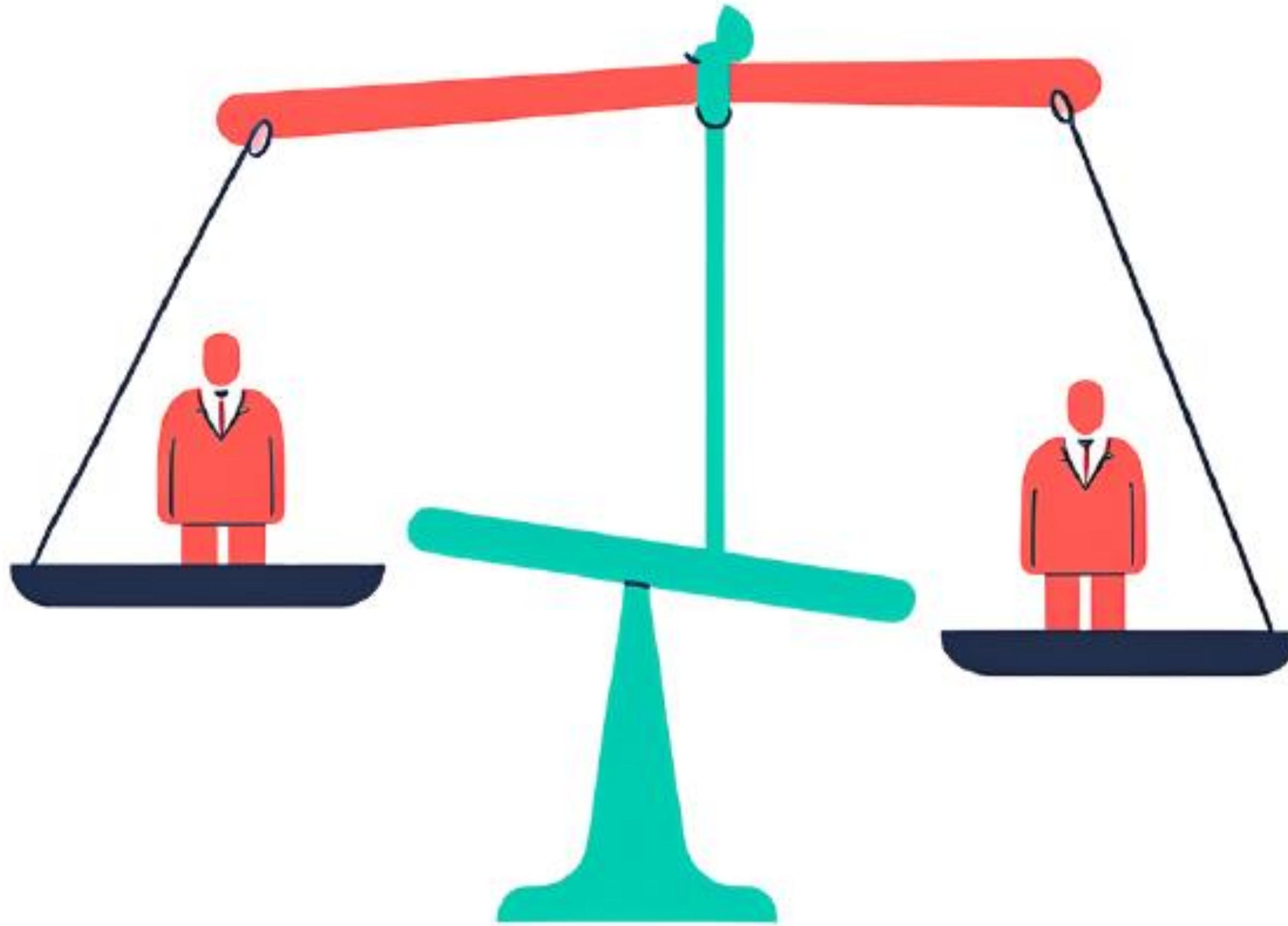
How to get the best out of Public/Private Partnerships

Collaboration for the Long-term

Leveraging your existing assets

- **2025 – The year of the Charger Tender**
- **CPS development from circa 2011 due to the foresight of Transport Scotland**
- **Now reached the ‘beta deployment’ phase – already being delivered**
- **Very understanding ‘innovators’ and ‘early adopters’ to less patient, more demanding ‘early majority’**
- **Local Authorities remain critical.**
- **Charger to Vehicle Ratios are not improving quickly enough (varies regionally)
1:28 (74,000 Chargers 2.1m BEVs)**
- **Desire and Capital from Private Sector - Must be commercially viable!**

How to get the best out of Public/Private Partnerships

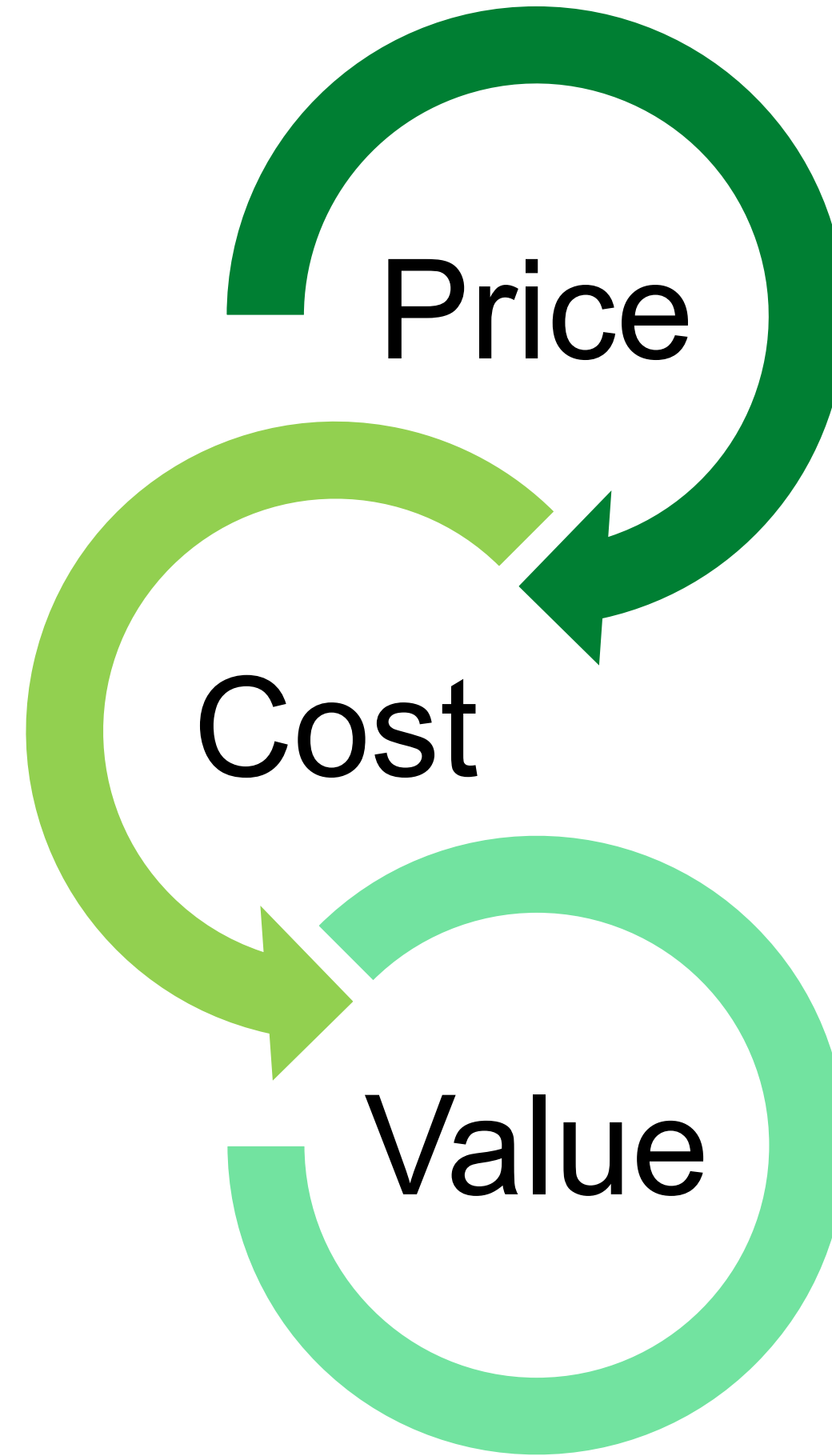


Collaboration for the Long-term

- Collaborative working – appointment is just the start
- Understand where LAs can support or hinder the process (TROs, planning requirements, documentation, approvals etc). Consider qualitative as well as quantitative elements
- Guided by good principals (governance and reporting)
- Use existing industry standards
- Establish what's important to you and focus on those (price, geographical deployment etc)
- Establish realistic and achievable SLAs with fair repercussions for poor performance
- Consider the value of the relationship over the term
- Sites will have varying value. Make sure the portfolio view isn't being skewed by the 'good' sites.

Leveraging your existing assets

Hardware and connection value
Utilisation data
Existing customer base
Established locations
Funding



Regulations
QA and remediation costs (liabilities)
Metering costs
Recommissioning compatibility and costs
Accessibility (PAS 1899)
Asset age and maintenance history
Location and utilisation
Vandalism and damage
Inherited reputation
Disposal costs

Summary

- Treat the relation as a Partnership – Service-led rather than transactional
- Establish what's important to the authority and focus on those elements
- Don't duplicate your effort. Acknowledge that drivers and objectives will be aligned and make use of existing statutory requirements
- Be realistic around values, costs and revenues
- Understand your current portfolio and its actual value
- Appreciate the risks being accepted by CPOs
- Consider the recommendations contained within TS' Draft Implementation Plan
- Engage and rely on the experts but.....





Let's change to greener living



Key Success Factors in Expanding Public Charging



About Believ

- **Believ, started life as Liberty Charge in 2020, and is now one of the UK's fastest growing charge point operators** (CPOs) with over 1850 charge points installed across the UK since entering the market in 2021 with over 8000 in build.
- We work with you collaboratively; building partnerships and **investing for the long term**.
- Our investors include **Zouk Capital**, managers of HMRC's **Charging Infrastructure Investment Fund** (CIIF) and **Liberty Global**.
- We offer **all charging speeds** ranging from slow 3kW to ultra rapid 350kW.
- We provide **on street, off street and e-mobility hubs**.
- We work with our sister company **Virgin Media O2** and **local electrical installers** to install our charge points.
- All our charge points use **100% renewable energy**



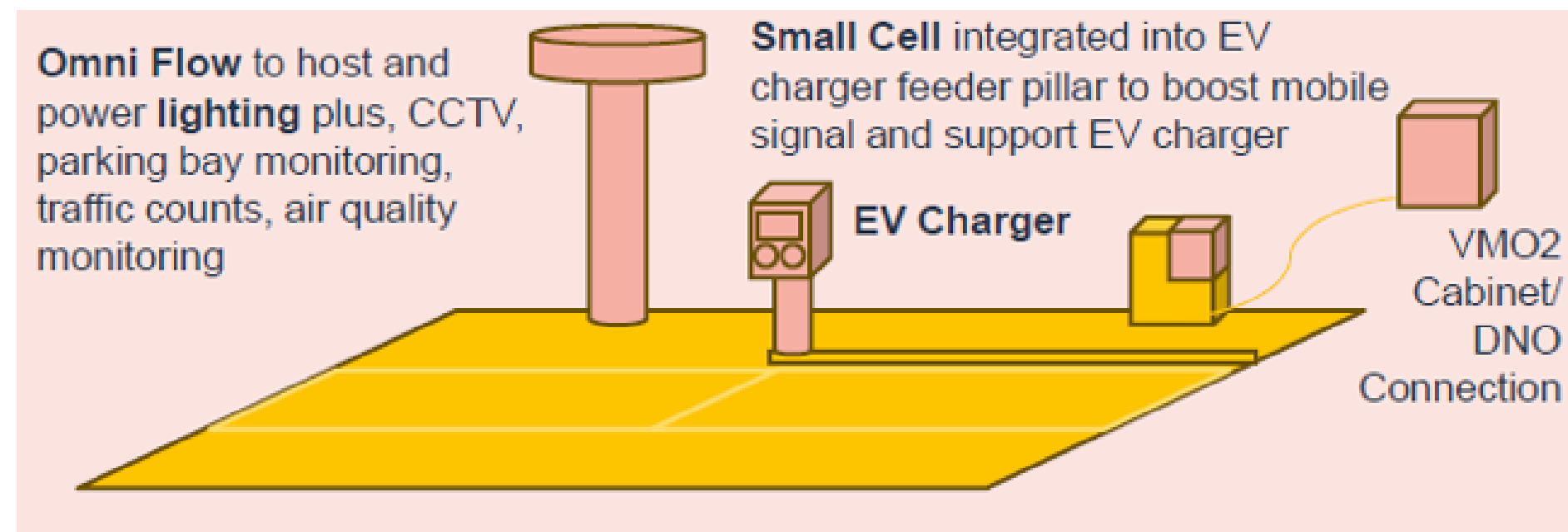
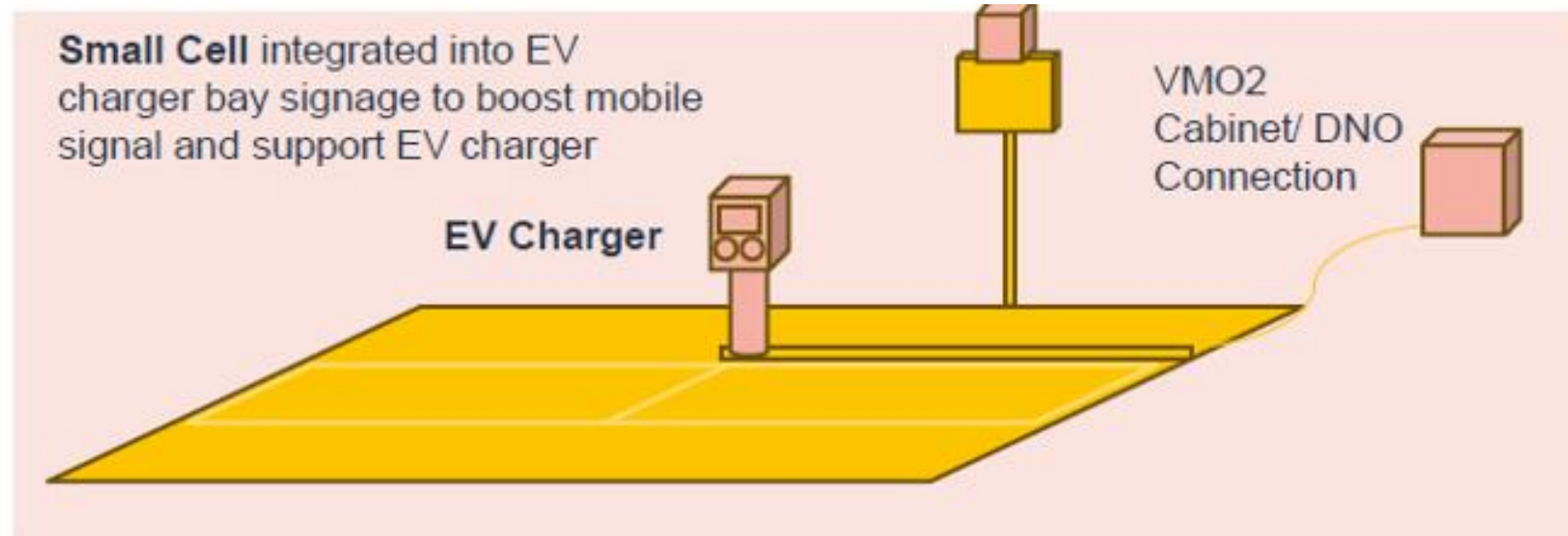
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www.croydon.gov.uk



What's Here?



What's To Come?



What Makes A Good ITT?



Contract lengths

Site Selection / Portfolio Approach

Defined Goals

Pre-Tender Communication

Tariffs

Types of hardware

Accessibility

Past Experiences

The Good

- Time to complete
- Multi Local Authority Projects vs Going Alone
- Site Selection
- Social Value
- Funding
- Lots

The Bad

- Time to complete
- Site Selection
- Funding
- Lots

Barriers to Bidding

Contract lengths

Site Viability

Termination for Convenience Clauses

Unrealistic SLAs

Non-Dedicated EV Bays

Break Clause vs Extension





Thank You

Anthony Boyd

Senior Public Sector Partnerships Manager – Northern Ireland & Scotland

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Private sector perspectives: Panel Q&A

Chair:

Iain MacLeod
Energy Saving Trust

Panel:

Stephen Rennie (Urban Fox);
Andy Mouat (Scottish Power);
Anthony Boyd (Believ)

Afternoon break

See you back here at 15:40 for
our 'Industry panel session'

Industry panel discussion

Chair:

Mark Constable

Trojan Energy & ReCharge UK

Panel:

Juliet Flamank (GFI);

Adam Turner (PwC);

Shayne Rees (char.gy);

Richard Lockhart (Burness Paull)

Closing comments & final thoughts

Matt Eastwood
Transport Scotland

energy
saving
trust

Thank you

