Agenda Item 19

Report to: **Partnership Board –Transport for the South East**

Date of meeting: **21 July 2025**

By: **Chief Officer, Transport for the South East**

Title of report: **Technical Programme Progress Update**

Purpose of report: **To provide a progress update on the ongoing work to deliver the technical work programme set out in the 2024/25 business plan**

RECOMMENDATIONS:

The members of the Partnership Board are recommended to:

1) **Comment on progress with the work to implement the Electric Vehicle Infrastructure Strategy;**
2) **Comment on the progress with the delivery of the Freight, Logistics and Gateways Strategy;**
3) **Comment on the progress with the work on rail;**
4) **Comment on the progress with the work on active travel;**
5) **Comment on the progress with the work on future mobility; and**
6) **Comment on the progress with the work on decarbonisation.**

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1. Introduction

1.1 The purpose of this report is to provide a progress update on the delivery of a number of elements of the Transport for the South East (TfSE) technical work programme.

2. Progress update

2.1 As progress update on each of the element of the technical work programme is set out in **Appendix 1.**

3. Financial considerations

4. The work on electric vehicle charging infrastructure, freight, rail and decarbonisation set out in this report is being funded from the DfT grant funding for 2025/26.

5. Conclusions and recommendations

4.1 Members of the Partnership Board are recommended to comment on the progress that has been made with the various elements of the TfSE technical programme set out in this report. A further progress update report will be presented to the Partnership Board at their meeting in October 2025.

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Appendix 1 - Technical Programme Progress Update

1. Introduction

1.1 The purpose of this appendix is to provide a progress update on the delivery of a number of elements of the Transport for the South East (TfSE) technical work programme.

2. Electric Vehicle Charging Infrastructure

2.1 Work has recently been completed on a 'state of the region' report that aimed to establish the progress being made with the rollout of EV charging infrastructure across the TfSE area. The work included one-to-one engagement with Local Transport Authorities (LTAs) to identify the key issues and challenges being faced with the rollout of future EV charging infrastructure. The insight and intelligence received has fed into a series of recommendations for TfSE to consider taking forward as part of our future work in this area. The recommendations broadly sit under three types of activities that TfSE could undertake to support EVCI development in the region:

- **Centre of Excellence seminar series** – one or potentially multi-part seminars, workshops and/or roundtables to deep dive on particular EVCI related topics.
- **EV Forum working groups** – focus groups that will meet and work together on advancing topics that currently represent gaps in knowledge.
- **TfSE projects** – Potential topics that TfSE could coordinate deeper dives on, whether related to data gathering and analysis or the development of frameworks and guides to support LAs in EVCI implementation.

2.2 A copy of the project report is contained in Appendix 2. In addition, the feedback received also fed into TfSE's response to the CIHT's Call for Evidence on the challenges faced regarding the rollout of infrastructure.

2.3 As reported to the Partnership Board in January 2025, a pioneering piece of work was completed at the start of the year which aimed to assess the impacts of the electrification of commercial vehicle fleets on a publicly available charge point provision. Since then, a follow-on project has commenced that aims to develop a guidance framework for local transport authorities to support them with planning the roll out of EV charging infrastructure that will be more accessible to commercial fleet vehicles. This work is including the development of case studies for the areas of Slough Borough Council and Brighton and Hove City Council. The project is due to be completed in July 2025, therefore a further update on this work will be presented to the Partnership Board at the October 2025 meeting.

3. Freight, Logistics and Gateways Strategy

3.1 Work continues on improvements to the Alternative Freight Fuel Infrastructure (ALFFI) tool developed by Midlands Connect, which identifies, ranks and evaluates potential locations for public HGV alternative recharging sites. The addition of more data from the TfSE local area will enable a GIS map to be produced to show where these potential HGV recharging sites could be located in our area. Once this work has been completed TfSE officers will be engaging with our local authority transport and planning officers to demonstrate how the local data and the tool can identify potential sites.

3.2 The Freight Awareness Programme is nearing the end of its first phase. To date the working group has held two meetings to discuss identify the types of freight knowledge gaps in local authorities. The working group consists of local authority transport and planning officers, a representative from the University of Southampton, representatives from the STBs and the Steer management team. Members of the group have been on local high street visits to learn more about the issues faced by freight operators and local businesses and how local authorities can support the movement of freight in their area. There was also a group visit to DP World and the UPS logistics centre at London Gateway Port to learn more about national and international freight and logistics movement issues. The University of Southampton, professional bodies, for example, the Chartered Institute of Logistics and Transportation, Chartered Institute of Highways and Transportation and Transport Planning Society, and the Road Haulage Association and Logistics UK have also been approached to discuss how they can contribute to the training which will be developed in the second stage of project. The next step will be to produce a report on the first stage before moving onto the second stage later in July 2025 which will develop specific training sessions and planning how to deliver them. A further update on TfSE's work on freight and logistics will be presented to the Partnership Board at their meeting in October 2025.

3.3 Another meeting of the Wider South East Freight Forum, which covers the TfSE, England's Economic Heartland and Transport East areas was held on 10 June 2025. The main focus of this meeting was collaboration between local authorities and the freight and logistics sector. There were presentations from East Sussex Council and Buckinghamshire County Council about their experiences of developing and consulting on their freight strategies, and from UPS on their experience of working with local authorities. There were also had updates on the work of the data sharing Forum sub which are planning to liaise directly with local freight and logistics firms about the types of data that they might be able to share with the Forum in the coming months and the way in which they can do this while protecting their commercial confidentiality. Another Forum is planned for November 2025.

4. Rail

4.1 Work continues on the Intermodal Rail Freight Study project covering the TfSE area. This is looking into the opportunities to more freight by rail. Meetings were held with East Sussex County Council and Brighton and Hove City Council to discuss the potential for parcel freight to be carried by rail using Brighton Station. Meeting have also been held with other stakeholders interested in intermodal freight, including those currently developing the new interchange facilities at Theale, Reading. Network Rail have now also provided some forecasting data for the estimated level of rail freight assumed that they will need to be carry to meet the government's 75% rail freight growth target by 2050. These data will be incorporated into the final report which is due be completed later in July/August 2025.

4.2 Work on the TfSE Rail Strategy commenced in mid-June. It will develop a stronger evidence base with which to advise the Secretary of State, Great British Railways and the Office for Road and Rail and its partner local authorities on the rail priorities for the TfSE area. A further update on the progress of the work on rail will be given to the Partnership Board Meeting in October 2025.

5. Active Travel

5.1 The final version of the Regional Active Travel Strategy and Action Plan document has now been made available on the TfSE website.

5.2 Meetings of the Regional Active Travel Steering Group have continued. The Steering Group is comprised of representatives from each of the 16 constituent LTAs, as well as national and strategic partners including Active Travel England, Homes England, National Highways, Network Rail, Sustrans, and Transport Action Network. The Steering Group met in May 2025 and the meeting featured a presentation from Active Travel England and a workshop session on the TfSE Transport Strategy missions. Knowledge sharing and collaboration between Steering Group members was facilitated through roundtable updates. The next meeting will be held in September 2025.

6. Future Mobility

6.1 The latest meeting of TfSE's South East Future Mobility Forum (SEFMF) was held online on 9 June 2025. The theme for the meeting was Integrated Transport. There was a presentation from Lewis Brencher from Transport for Wales on their work programme, widely referred to as the South Wales Metro. There was a second presentation from Nicholas Reid from Great Western Railway (GWR), who is the Integrated Transport Manager. He shared various case studies on how GWR is working to integrate their services with other modes. The next SEFMF will be held in September 2025 on the theme of Data.

7. Joint work on decarbonisation

5.1 As reported to the Partnership Board in March 2025, the Carbon Assessment Playbook, jointly created by the seven STBs, enables the baseline carbon emissions and trajectories to net zero in each of the LTAs to be identified. Each LTA is then able to assess the carbon reduction potential of the proposed transport interventions included in their local transport plans. To help LTAs become more proficient in using the tool, a programme of 1-2-1 support is now underway to enable representatives from the LTAs to better understand how to use the tool. This work will help identify potential enhancements to the tool to be undertaken in 2025-6, subject to the availability of funding. A further update on the progress of the development of the Carbon Assessment Playbook will be given at the Partnership Board Meeting in October 2025.

Report
May 2025

EV Programme Discovery Project – Summary Report

Transport for the South East
Our ref: 24559705

steer

Report
May 2025

EV Programme Discovery Project – Summary Report

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Contents

Appendices

1 Glossary

1.1 Below we provide a glossary table of key terms that are used throughout this report.

Key term	Definition
CPO	Chargepoint Operator
DNO	Distribution Network Operators
EVCI	Electric Vehicle Charging Infrastructure (i.e. charge points or charging stations)
LA/LTA	Local Authority/ Local Transport Authority
STB	Sub-national Transport Body (TfSE)
TfSE	Transport for South East (an STB)

2 Introduction

Background

2.1 The Government's electric vehicle infrastructure strategy, published in 2022, includes the funding of sub-national transport bodies to support energy system stakeholders and local transport authorities in planning charging infrastructure provision.

In 2023, Transport for the South East (TfSE) published a **regional electric vehicle charging infrastructure strategy and action plan** that focuses on the charging infrastructure requirements for privately owned vehicles. Several actions that were developed via the strategy action plan focused on the role for supporting local transport authorities with the continued rollout of electric vehicle charging infrastructure within each of their respective areas.

The rollout of publicly available charging infrastructure has progressed rapidly over recent years. Therefore, it is important for TfSE to understand the current status of infrastructure rollout at a regional level, as well as engage with local transport authorities to identify how TfSE can provide further support to them with the future installation of charging infrastructure.

Purpose of the work

2.2 Transport for the South East commissioned Steer to undertake a study to:

- Assess the progress and status of Electric Vehicle (EV) adoption and Electric Vehicle Charging Infrastructure (EVCI) rollout across the region (see Section 3).
- Identify the challenges that LTAs have faced in rolling out EVCI (see Section 4).
- Identify the ways in which TfSE can support the LTAs and the region in developing EVCI and supporting EV adoption (see Section 5).

This work builds on TfSE's previous and ongoing work, including assessing and understanding the future demand and impacts on a publicly available charging network from commercial vehicle fleets, facilitating a regional EVCI forum for the south east and providing the STB EVCI Visualiser Tool via the regional Centre of Excellence to support and accelerate the EV transition.

This report includes cross-region findings and recommendations to help the Transport for the South East in supporting its constituent LTAs in ensuring and enabling progress towards the provision of a public charging network that meets all users' needs.

Stakeholder engagement

2.3 In April 2025, TfSE and Steer jointly conducted interviews with LTA officers to identify and understand the barriers and challenges that are being experienced with the rollout of EVI in their respective areas. The LTAs engaged with are listed below:

- Bracknell Forest
- Brighton and Hove
- East Sussex
- Hampshire
- Isle of Wight
- Kent
- Medway
- Portsmouth
- Reading
- Southampton
- Surrey
- West Berkshire
- West Sussex
- Windsor and Maidenhead
- Wokingham

2.4 Each interview adhered to a structured format, beginning with a review of baseline statistics on electric vehicles (EVs) and comparative data from other local transport authorities (LTAs). This initial step was crucial for establishing a comprehensive understanding of the current state of electric vehicle charging infrastructure (EVCI) rollout across the South East. The remainder of each session followed a structured interview guide, which delved into the following topics in greater detail:

- Challenges to public sector development of public charging infrastructure projects
- Challenges to securing public sector funding
- Challenges to attractive private investment in compliant with procurement regulation
- Challenges for different socio-demographic groups / geographical areas
- Challenges to the electrification of commercial vehicles
- Challenges to the electrification of the authority's own fleet
- What has worked well in terms of EV infrastructure progress
- Whether the LTA has an EV strategy and when it was last updated
- What initiatives could support the LTAs in their roles

2.5 The key findings of our conversations are presented in Section 4.

3 Progress in EV Infrastructure

Overview

3.1 The latest UK Government figures[1] (for Q2, 2024) indicated that there were approximately 162,000 Battery Electric Vehicles (BEV) cars and 13,000 BEV vans across the TfSE area, as well as a further 90,000 Plug-in Hybrid Vehicles (PHEV) cars and vans (99% of these cars).

3.2 The LTAs within the TfSE area vary greatly in terms of the area each covers, the size of their populations, socio-demographics and housing profile. Therefore, rather than looking at absolute numbers of vehicles and chargers, the analysis presented in this section focuses on EV penetrations (proportion of the fleet that is electric) (

[1] Base data from - DfT Vehicle licensing statistics: VEH0105, VEH0142. Available at: **https://www.gov.uk/government/statistical-data-sets/vehicle-licensing-statistics-data-tables** (Accessed: March 2025)

3.3 Figure 1) and EV/EVI ratios (Figure 2). Figure 3 provides a further layer of detail on EVI provisions by looking at the power the public network can hypothetically provide and how this meets the needs of the EV fleet based on EU targets as defined in the Alternative Fuels Infrastructure Regulations (AFIR)[2]. Although these EU regulations do not apply in the UK, they are a good benchmark against which to track progress.

3.4 5.5% of the cars and vans in the TfSE region are electric, compared to 4.6% across the UK. There are on average 28 EVs per charger in the region, compared to 30 EVs per charger across the UK[3]. The region as a whole is currently ahead of the national average, but the disaggregated figures show discrepancies in progress between the LTAs. Figure 3 in particular shows the progress LTAs are making with public charging infrastructure total output, against their targets. This shows a varied picture across the TfSE region.

EV Adoption

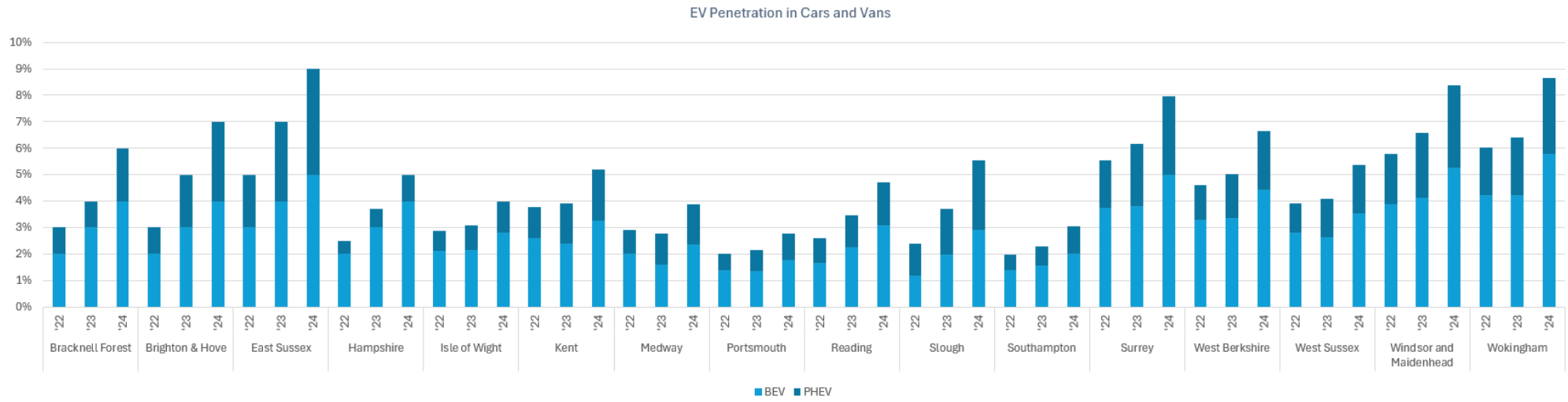
3.5

[2] **Alternative Fuels Infrastructure - European Commission**

[3] DfT Electric vehicle public charging infrastructure statistics: Table 01a and 01b. Available at: **https://www.gov.uk/government/statistics/electric-vehicle-public-charging-infrastructure-statistics-april-2025/electric-vehicle-public-charging-infrastructure-statistics-april-2025** (Accessed: March 2025)

3.6 Figure 1 combines data for cars and vans, highlighting that the uptake of EVs is more advanced in cars. Currently, less than 2% of the van fleet has transitioned to electric vehicles. In 2020, the average penetration of electric vans was 0.5%, marking a tenfold increase over approximately 4 years. However, there are still over ten times more electric cars than electric vans, as indicated by the figures at the start of this chapter.

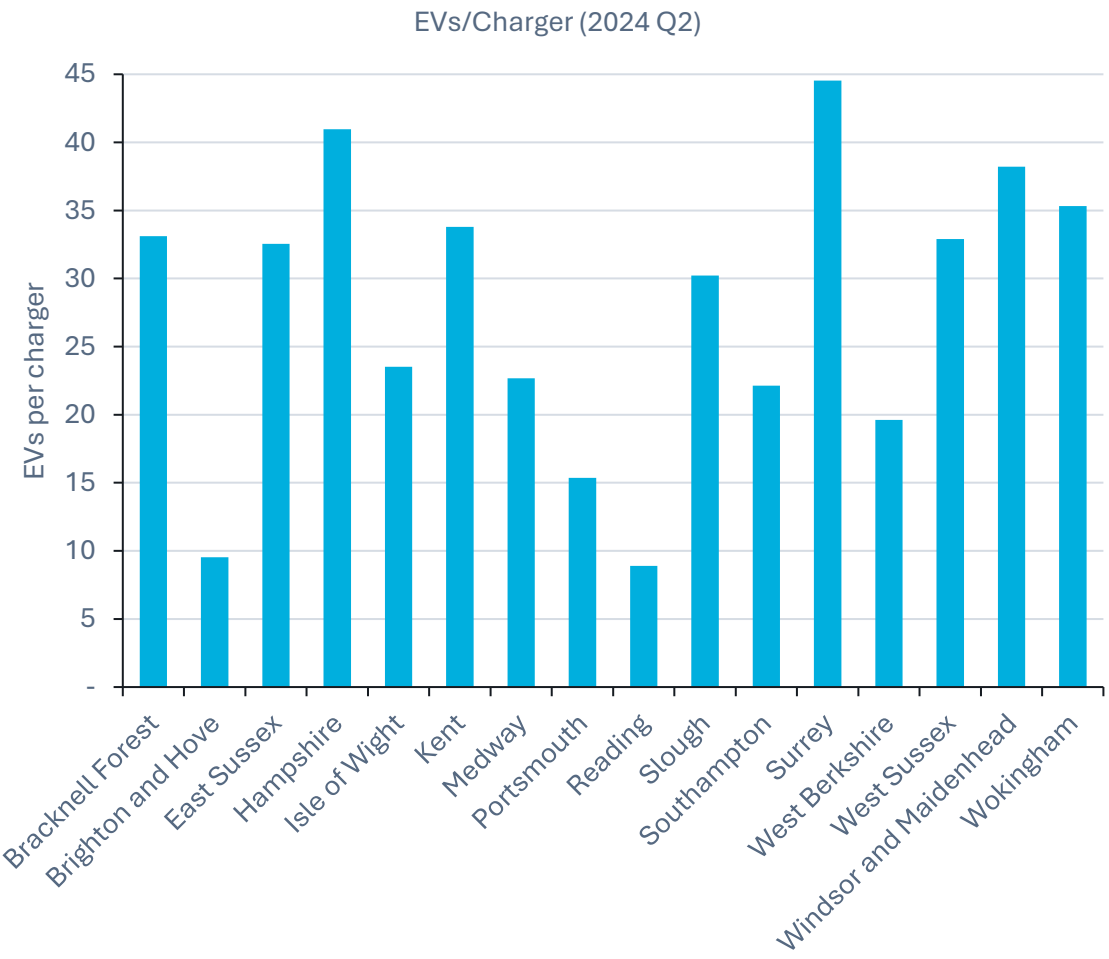
Figure 1: Proportion of vehicle fleet that is BEV and PHEV penetration in Q2 of 2022, 2023 and 2024 by TfSE local transport authorities.



EVCI rollout

3.7 To understand the progress of the EVCI rollout across the TfSE area, it is important to compare charger numbers with vehicle numbers. The lower the number of EVs per charger, the better. However, higher EVs per charger may mean that there is more private charging available in those areas (e.g. domestic, workplace). Utilisation rates of existing public charge points and/or surveys to understand private charging availability and use would supplement the picture being presented by the chart in Figure 2.

Figure 2: Number of EVs for each public charger by LTA in Q2 2024. Data source: DfT Vehicle and Electric vehicle public charging infrastructure statistics VEH0105, VEH0142 and Table 01a, Table 01b[4].



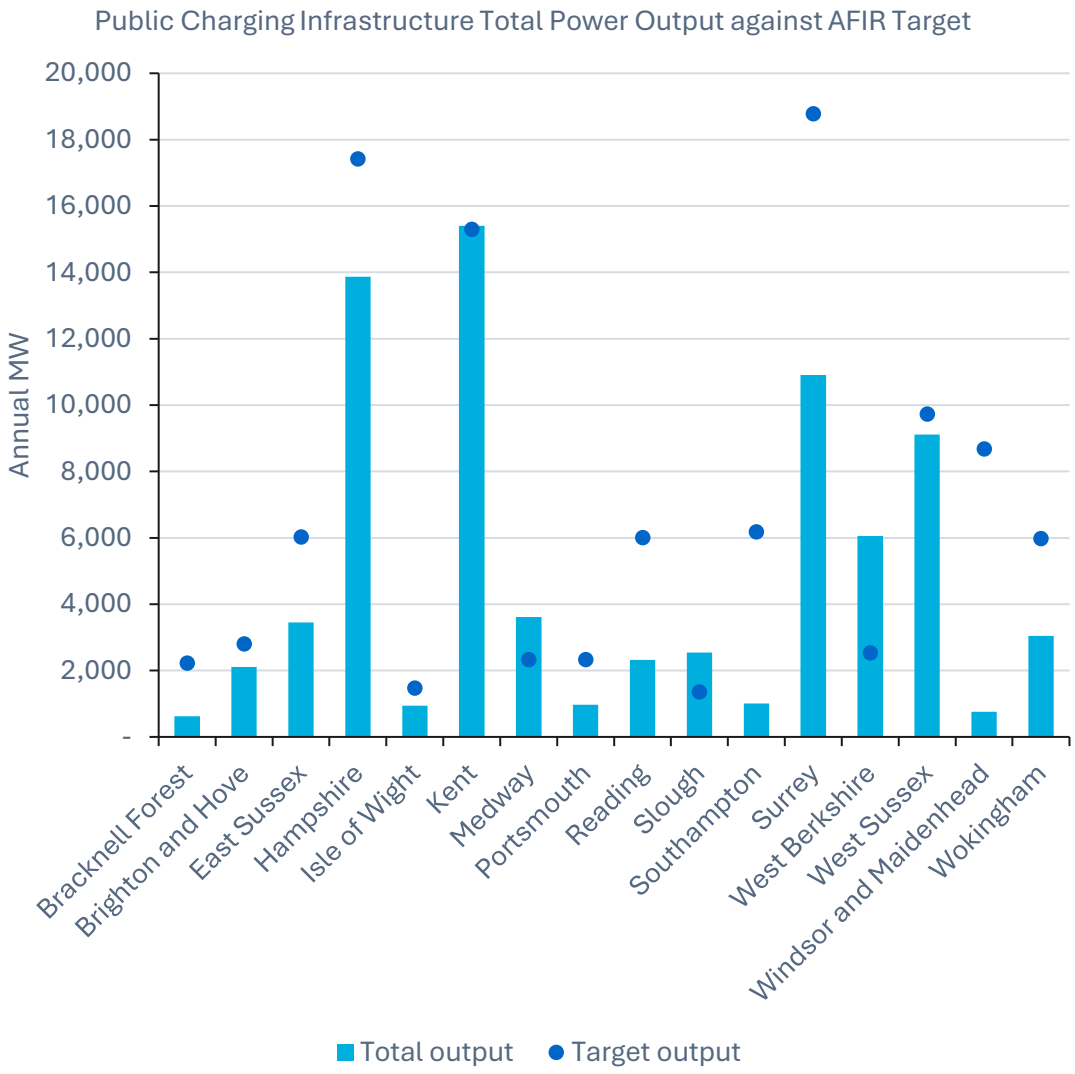
3.8 UK Government electric vehicle public charging infrastructure statistics are published on a Local Authority basis based on two categories: >50 kW, < 50kW. By placing an assumption on the average power rating of the chargers in each of these categories (7kW

[4] Available at: **https://www.gov.uk/government/statistical-data-sets/vehicle-licensing-statistics-data-tables** and **https://www.gov.uk/government/statistics/electric-vehicle-public-charging-infrastructure-statistics-april-2025/electric-vehicle-public-charging-infrastructure-statistics-april-2025** (Accessed: March 2025).

for <50 kW category and 150 kW for >50 kW) we can assess the power available through those chargers. The power assumptions are informed by ONS figures which show that nationally 70% of chargers in the '<50 kW' are 3-8kW and 30% are 8-49 kW, half of chargers in the '>50 kW' category are 50-149 kW and half are 150kW and above. This gives the 'total output' in Figure 3.

3.9 The 'target output' in Figure 3 is based on AFIR which states that a total power output of at least 1.3 kW must be provided through publicly accessible charging stations for every light-duty BEV and 0.8 kW should be provided for every light-duty PHEVs.

Figure 3: Estimated total power output of the public EVI network by LTA, compared to EU targets.



Neither of the above metrics consider that some LAs will need more public infrastructure than others based on the amount of private infrastructure that exists. Private infrastructure includes domestic chargers which is related to the proportion of households with off-street parking (see

3.10 Table 1) and workplace charging (there is no comprehensive data source for this information although there are government statistics on the number of private/workplace chargers rolled out with the support of government grants (while these were available)).

Table 1: Local Authority proportion of households with off-street parking/parking potential. Source: Field Dynamics[5].

LTA	Households with access to off-street parking[5]
Bracknell Forest	61%
Brighton and Hove	47%
East Sussex	68%
Hampshire	53%
Isle of Wight	67%
Kent	68%
Medway	70%
Portsmouth	34%
Reading	49%
Slough	58%
Southampton	73%
Surrey	70%
West Berkshire	74%
West Sussex	69%
Windsor and Maidenhead	67%
Wokingham	76%

[5] Source: **https://onstreetcharging.acceleratedinsightplatform.com/**. Field Dynamics have determined households that have sufficient space to park and charge within the boundaries of their property using Ordnance Survey's OS MasterMap Topography and AddressBase datasets. Each property has been assessed using Field Dynamics advanced algorithms to provide the parking propensity score of 0, 1 or 2 for each individual UPRN. Any property with a score of 0 is an on-street household.

4 Key findings

Summary

4.1 On reflection of the feedback from EVI officers at LTAs, we have identified the most prevalent and common themes that have impacted the pace of EVI development. These have been categorised into political, economic, social, technological / environmental and legal categories as shown in Table 2 below.

Table 2: Key common themes between stakeholders

Category	Key themes			
Political	Government cycles including elections and funding programmes such as LEVI.	Political indecision on approach to cross-pavement solutions.	Government minister and Changes in political parties or government ministers impact priorities and ambition for EVI rollout.	Official guidance documents published late.
Economic	LA cost implications of a lengthy procurement route/timeline.	Lack of the necessary insurance policies for damage or relocation of chargers, which led to issues with redundant equipment.	Budget / resource constraints meaning other initiatives (outside of LEVI) are parked / progress is slowed.	Ensuring commercial viability is key but difficult with unknowns and competing interests over land.
Social	Difficulty balancing and meeting the needs of different socio-demographic groups.	Skills shortage internally at the Council (and sometimes at CPO and/or specific projects).	Lack of confidence and myths for users thinking about switching to an electric vehicle.	Poor accessibility of EV bays.
Technological / Environmental	EVI maintenance delays on smaller pilot projects.	Some areas much further ahead that others with EV	DNO delays for connections.	

		uptake and progress.		
Legal / Regulatory	Freeholder/Landlord permission issues for EVI installations.	Policies and permitting rules for cross-pavement solutions undefined.		

4.2 Building on the most common themes identified by stakeholders and presented in the table above, we summarise in the rest of this section the key challenges and experiences identified by stakeholders that we heard in response to each key interview theme.

Theme 1: Public sector development of public charging infrastructure projects

- Changing direction (i.e. Section 50 and 155 of the Highways Act) and delayed guidance from support bodies (i.e. DfT, ORCs) and government, especially on heads of terms and approval process.
- Lack of transparency and coordination over publication of LEVI tenders.
- Slow approval timescales of LEVI applications, in some cases applications are overengineered which delays the process.
- LEVI requirements are challenging due to scope changes.
- Lack of understanding of the capacity in the market to meet the level of demand.
- Significant DNO delays e. g. grid connections (potentially down to landowner permissions required for wayleave or easements).
- Lack of evidence from CPOs on number of users and utilisation.
- Tariffs and the pressure to keep this low and attractive for residents but still financially viable.
- Political party politics influencing the speed of EV infrastructure rollout.
- Permission concerns on roads that are not yet adopted by the Council (i.e. owned by a Housing Association / Developer).
- Financial viability of Charge Point Operators (CPOs) over the contract term.
- Challenges with rollout due to lack of project dedicated resources for the LTA, DNO and CPO.
- Liability and safety concerns with cross-pavement solutions, particularly for disabled users.
- The need to run appropriate level of public consultation for on-street bays before projects are agreed to avoid backlash and manage expectations of residents.

Theme 2: Securing public sector funding

- Securing LEVI funding involves multiple governance groups and a lengthy procurement route.
- LEVI process is holding local transport authorities back from delivering more commercially viable chargers.
- Delays from government due to election periods and funding cycles.

- Lack of clarity from LEVI support body impacts the Council's ability to submit ITT documents for approval.
- Securing public sector subsidies is difficult due to budget constraints and political priorities.
- The capability fund of the LEVI pot has been helpful but does not stretch far enough in some cases.
- CPOs are saturated with Requests for Proposals, meaning they can select their preferred LA. Smaller LAs are finding they need to make their tenders less beneficial to the authority to attract bidders, there is concern that they will not be able to run successful LEVI tenders.
- Councils often lack resources (time/skill/experience) to run procurement exercises.
- Competing demand for the land available and the financial circumstances of some councils means some of them have reduced land available for which they're able/willing to enter into long land leases with CPOs in case the council later wishes or needs to sell land/redevelop within the typical 15 year term of CPO contracts.
- Lamp columns have a finite life, which can result in abortive work on lamp column chargers if the lamps need replacing.

Theme 3: Attractive private investment in compliance with procurement regulation

- Conflicts between the non-negotiable terms of LEVI and the ability of third-party CPOs to fund or operate charge points on the network.
- Questions from the CPOs around return on investment in case of early termination of infrastructure of the infrastructure (CPOs don't like break clauses)
- Those living in leasehold accommodation with off-street parking face issues getting landlord permission for EVI installation.

Theme 4: Different socio-demographic groups / geographical areas

- In some of the lower affluence areas, there is a high number of commercial company vans and limited off-street parking provision.
- Lower density suburbs face difficulties in developing public electric charging network due to commercial viability and sometimes electricity network constraints.
- High density housing areas have parking constraints that makes putting in EV bays difficult, especially ahead of demand.
- Balancing the differing needs of different groups, including vulnerable users e.g. disabled users.
- Some areas rely more on the second-hand market and declining prices, whilst others take advantage of the new EV market.
- Financial implications for residents who rely on parking spaces if some of these are repurposed for electric vehicle charging infrastructure and vehicles.

Theme 5: Electrification of commercial vehicles

- Lack of confidence for commercial vehicle users in switching to electric vehicles due to charge point anxiety e.g. availability of a nearby charger.
- Range of fleet managers operating different services can hinder the progress of electrification of the Council's total fleet
- Councils can struggle to support commercial fleet electrification, particularly when there is a need for demand validation and direct engagement with commercial operators. Lack of connections to commercial vehicle operators/drivers.

Theme 6: Electrification of the authority's own fleet

- Co-ordinating the intervention of properties, fleet, human resources, and finance to build an actionable plan for fleet conversion, depot charging, home charging, and energy procurement.
- Reconfiguring existing depots to accommodate additional chargers.
- Council's fleet strategy not always active or up to date and in some cases in need of a renewal.

Theme 7: Challenges with internal and external resources, skills

- Generally, LAs have a shortfall in staff (e.g. / GIS / Procurement and Legal) and expertise in EV/EVIs.
- There are many small-scale arrangements with suppliers, and maintenance can take a while.
- Lack of insurance policy for damage / relocation of chargers from a car park to a new location, which resulted in redundant kit in a car park.

5 Recommendations

5.1 In addition to reviewing the key challenges, feedback and suggestions collated from the stakeholder engagement, the recommendations for TfSE's work programme have been developed with consideration of:

- existing initiatives and the roles and remits of other organisations in the EV ecosystem,
- the holistic elements necessary for the development and operation of a public EV charging network that meets everyone's needs, and,
- the role, remit and resources of TfSE.

5.2 The recommendations broadly sit under three types of activities that TfSE could undertake to support EVI development in the region:

- **Centre of Excellence seminar series** – one or potentially multi-part seminars, workshops and/or roundtables to deep dive on particular topics.
- **EV Forum working groups** – focus groups that will meet and work together on advancing particular topics that currently represent gaps in knowledge, the working groups may co-develop the scope of some of the Centre of Excellence events.
- **TfSE projects** – these are topics that TfSE could coordinate deeper dives on, whether related to data gathering and analysis or developing of frameworks and guides to support LAs in implementation. These projects will link to the working group or seminar themes.

5.3 These three recommendations align with the themes of stakeholder discussions and address the key points of stakeholder feedback. This alignment is summarised in Table 3 below and the further detail for each recommendation is provided in the rest of this chapter.

Table 3: Alignment between interview themes, key feedback and recommendations

		Key feedback from LTAs	Recommendations		
			Centre of Excellence – Seminar series	EV forum working groups	TfSE projects
Themes	Theme 1 Public sector development of charging projects	• Changing direction and delays • Slow LEVI application approvals • Significant DNO grid delays • Political influence on rollout • Financial viability of CPOs	✓	✓	
	Theme 2 Securing public sector funding	• Lengthy LEVI funding process • LEVI delays hinder authorities • Government election period delays • Public sector subsidies difficult • Councils lack procurement resources	✓	✓	
	Theme 3 Attractive private investment in compliance with procurement regulation	• LEVI terms conflict with CPOs • CPOs concerned about ROI • Leaseholders face landlord issues • Early termination concerns • Funding and operation challenges	✓	✓	
	Theme 4 Different socio-demographic groups / geographical areas	• Limited off-street parking • Suburbs face network constraints • High density parking issues • Balancing diverse user needs • Financial impact on residents		✓	✓

Centre of Excellence - Seminar Series

5.4 TfSE's regional Centre of Excellence webpages are a space for local transport authorities to 'access resources, collaborate, and knowledge share', as such the Centre of Excellence will host a repository of signposts to other useful data sources, tools and knowledge hubs such as those hosted by the Energy Savings Trust and via NEVIS. In addition, it is proposed that the Centre of Excellence will run a series of seminars on the following:

- Running successful EVI procurements: LEVI and beyond.
- LEVI lessons learnt (and learning).
- Collaboration between CPOs & LAs: CPOs to understand council structures, governance processes, risk profiles and development of collaborative contract templates that speak to CPO risks.
- Equity in electrification: thinking about commercial fleets and other users with accessibility requirements.
- Cross-pavement solutions: how-to (learnings from working group).

EV Forum - Working Groups

5.5 The working groups, arranged around the topics listed in this section, will be a sub-group of the EV forum and may include other stakeholders on an ad-hoc or more fixed-term basis. LTAs will select which working groups they wish to be a part of and/or may also be invited to attend particular working groups to share their learning.

5.6 Whereas the Centre of Excellence series may consist of up to three events under one topic, the working groups will need to meet at regular intervals (e.g. monthly) over a longer period (e.g. at least 6 months) to make progress on the emerging topics and sub-topics as suggested below :

Cross-Pavement Solutions

- Policies
- Permits
- Electrical Safety
- Liability
- Impact on public infrastructure, equity and affordability (TfSE could run project and develop methodology for assessing this – see below)

LA Fleet Electrification

- Lessons learned
- Joint procurement of vehicles (templates/frameworks/sharing resources)

Bundling EVI opportunities (include Property colleagues)

- Smaller LTAs collaborating to offer CPOs larger scale opportunities to entice better offers and efficiently use resources

Property

- Best/good practice in land parcel inventories (capturing smaller land parcels, info on leased land, competing interests and ability to share/give access to this information to other departments or 3rd party partners)
- Making land available for EVI development whether under concessions or if disposing
- Considerations for grouping TROs (e.g. by district) to improve efficiency of permitting processes

TfSE Projects

5.7 These projects would be established utilising specialist teams internal or external to TfSE to support the development of relevant evidence bases and frameworks that will be co-designed and disseminated via the working groups mentioned above or via the Centre of Excellence platform.

- Cross-pavement solutions desktop impact assessment (equality impact assessment and impact on demand for public infrastructure).
- Cross-pavement solutions pilot evaluation or monitoring and evaluation plan.
- Support in local commercial fleet engagement and demand assessment.
- Wider EVI monitoring and evaluation programme.
- Regional assessment of equity in electrification (for commercial vehicles/ for those with accessibility needs or other protected characteristics).

6 Next Steps

6.1 As highlighted at the beginning of this report, Transport for the South East will use the recommendations identified to help develop our future technical work programme within the EVCI space. Overall, the recommendations that are evidenced within this report align closely with the overarching aim of TfSE's regional EVCI strategy and action plan which sets out a pathway for TfSE to support local transport authorities within the south east by facilitating the continued rollout of charging infrastructure in an efficient and cohesive manner through better local engagement, leadership and planning. From undertaking this study, it is clear that TfSE continues to have a key role to play as a facilitator for cross collaboration between the constituent LTAs as well as wider organisations, such as central government and OZEV, charge point operators, distribution network operators and wider groups such as the LEVI support body.

6.2 The outputs of this work will be shared with the TfSE Partnership Board and EVCI related stakeholder engagement meetings, including TfSE's regional EVCI forum and will be reviewed on a regular basis to ensure that TfSE is providing the necessary support towards the region's local transport authorities in delivering a robust publicly available charging infrastructure network across the south east.

A Further Data - EVI

Table 54: Annual number of <25 kW chargers (<50 kW chargers in 2024) between 2020-2024 (Q2) and the Compound Annual Growth Rate (CAGR)

LTA	2020	2021	2022	2023	2024	CAGR (2020 - 2023)
Bracknell Forest	27	33	43	55	93	26.8%
Brighton and Hove	162	268	332	389	418	33.9%
East Sussex	66	82	114	128	280	24.7%
Hampshire	265	324	444	493	649	23.0%
Isle of Wight	40	45	51	71	88	20.8%
Kent	220	267	340	572	671	37.5%
Medway	9	11	41	98	108	121.6%
Portsmouth	62	71	95	78	100	8.0%
Reading	43	50	87	96	244	30.7%
Slough	43	38	35	52	31	6.5%
Southampton	62	66	82	89	96	12.8%
Surrey	200	240	312	411	691	27.1%
West Berkshire	68	71	86	94	141	11.4%
West Sussex	122	151	186	275	458	31.1%
Windsor and Maidenhead	30	32	44	100	126	49.4%
Wokingham	21	26	52	90	142	62.1%

Table 6 5: Annual number of rapid chargers between 2020-2024 (Q2) and the Compound Annual Growth Rate (CAGR)

LTA	2020	2021	2022	2023	2024	CAGR (2020 - 2023)
Bracknell Forest	1	1	2	3	7	44.2%
Brighton and Hove	1	4	17	17	19	157.1%
East Sussex	17	19	27	37	50	29.6%
Hampshire	100	113	129	171	223	19.6%

Isle of Wight	3	2	3	9	13	41.5%
Kent	69	111	142	202	250	43.1%
Medway	6	7	7	8	61	10.1%
Portsmouth	2	3	5	7	13	51.8%
Reading	7	8	9	20	31	41.9%
Slough	21	30	36	23	45	3.1%
Southampton	4	6	10	35	14	106.1%
Surrey	49	68	79	119	167	34.4%
West Berkshire	29	31	37	64	104	30.2%
West Sussex	24	43	55	70	145	42.9%
Windsor and Maidenhead	1	1	3	3	8	44.2%
Wokingham	31	35	35	41	49	9.3%

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