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# Local Electric Vehicle Infrastructure (LEVI) Capital Fund

Information Pack  
2023-2025



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# About the Local Electric Vehicle Infrastructure (LEVI) Fund



# LEVI fund overview

The Local Electric Vehicle Infrastructure (LEVI) fund supports local authorities in England to work with the chargepoint industry, to improve the roll out and commercialisation of local charging infrastructure.

These public chargepoints will help residents who don't have off-street parking and need to charge their electric vehicles (EVs).

Funding will be available to Tier 1 local authorities in England across financial years 2023/2024 and 2024/2025.

# LEVI objectives

The LEVI fund aims to:



Deliver a step-change in the deployment of local, primarily low power, on-street charging infrastructure across England.



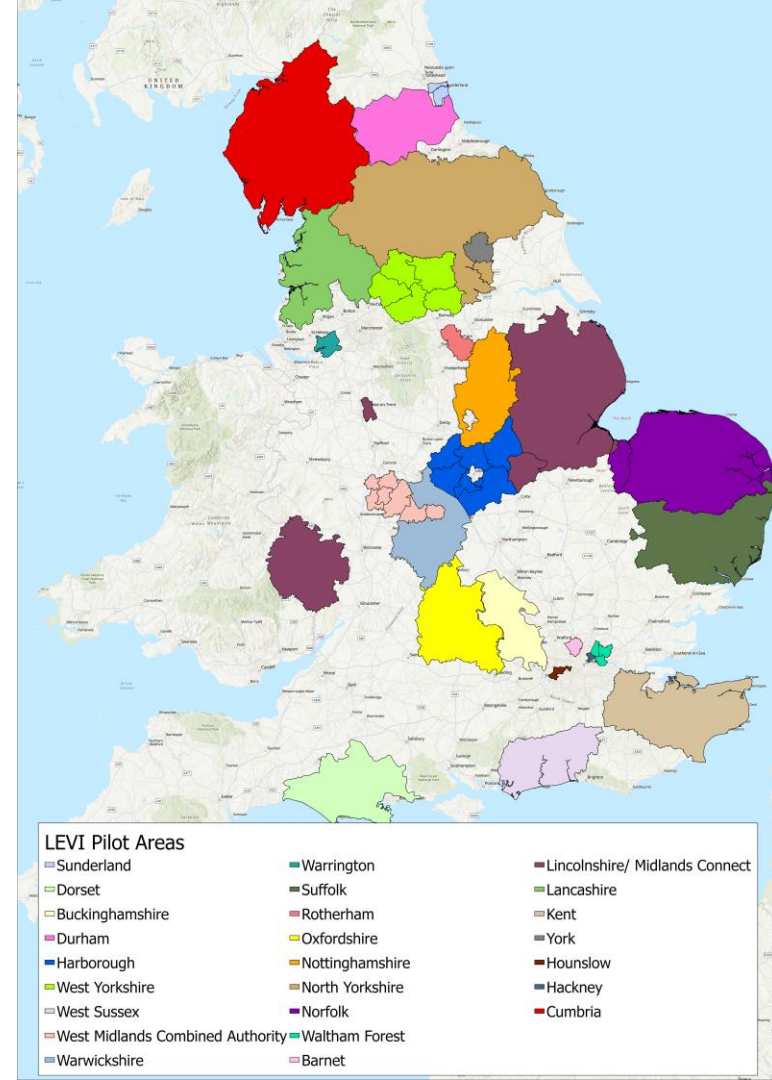
Accelerate the commercialisation of, and investment in, the local charging infrastructure sector.

# LEVI pilot

In August 2022, £10m was awarded to nine local authorities who applied to the LEVI Pilot Fund, funding over 1,000 chargepoints and gullies.

In February 2023, the LEVI Pilot Fund was expanded by an additional £22m government funding and £17m private investment.

This enabled three of the original LEVI pilot schemes to expand and funded 16 new pilot scheme areas, delivering 3,000 chargepoints and gullies.



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# About the LEVI Capital Fund



# LEVI capital fund

## **Eligibility and allocation**

Capital funding is available to Tier 1 local authorities (unitary, county council or combined authorities) in England. Combined authorities will be allocated and issued funding on behalf of authorities in their region. In London, capital funding will be delivered through borough partnerships.

Eligible local authorities will be informed of their LEVI capital funding amount in April 2023. Funding has been determined for each local authority using a data-led approach.

Alongside LEVI funding, local authorities will need to secure further investment to support the development of a more self-sufficient local chargepoint market ahead of the 2030 phase out date.

## **Project delivery**

There is no hard deadline for local authorities to spend funds. However, project delivery plans will be assessed through the application process, and we expect to see detailed, realistic timelines. The LEVI Support Body (see slide 10) will monitor adherence to these timelines over the project's lifetime.



# Summary of funding available



**£343 million capital funding** is available over financial years 23/34 and 24/25



Local authorities can be funded in **tranche one (FY 23/24)** or **tranche two (FY 24/25)**



Showing **value for money & additionality, strategic fit** and suitable **commercial arrangements** is key for securing funding



New chargepoints should primarily benefit **residents without off-street parking**



DfT will pay **90% of funding** after approving the application



DfT will pay **remaining 10%** after agreeing the local authority's contract



Project completion is flexible, however **evidencing progress against delivery plan** is essential



**Low power (<22kW), chargepoints suitable for public charging** are the focus on the fund, but higher powered chargepoints will also be considered as part of a project



Local authorities should use the Fund to **leverage private finance**

# The LEVI Support Body

Contact the LEVI Support Body by emailing [LEVI@est.org.uk](mailto:LEVI@est.org.uk)

The LEVI Support Body will provide ongoing assistance. It includes:



Energy Saving Trust provides **programme management support**



Cenex provides **technical EV infrastructure expertise**



PA Consulting provides **commercial expertise**

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# LEVI Fund Remit



# LEVI fund remit

## **The LEVI fund aims to:**

- Deliver a step-change in the deployment of local, primarily low power, on-street charging infrastructure across England.
- Accelerate the commercialisation of, and investment in, the local charging infrastructure sector.

## **Projects should consider**

- scale
- competitive procurement
- strong levels of private sector investment
- cross-subsidisation

## **Flexible approach**

LEVI funded projects must primarily benefit residents without off-street parking.

LEVI projects can also benefit other groups like tourists, customers, commuters, taxis, and commercial vehicles – if projects still primarily benefit residents, and if this increases the scale and commerciality of the project. See page 13 for more detail.

# Scope of LEVI capital fund

We will take a flexible approach to applications for the LEVI capital fund. Projects must demonstrate that they primarily focus on low powered chargepoints to benefit residents without off-street parking. But other chargepoints and users will be considered.

Applicants must show that the <u>majority</u> of chargepoints will benefit these users:	These users can also benefit from LEVI projects where there is sound commercial reasoning, but a <u>minority</u> of chargepoints must solely benefit them:	Applicants <u>cannot</u> include chargepoints for these uses:
<ul style="list-style-type: none"> <li>• <b>Residents without off-street parking</b> e.g. without a drive</li> </ul> <p>This could more specifically include:</p> <ul style="list-style-type: none"> <li>• Residents using local authority supported car clubs</li> <li>• Commuting residents where the majority do not have off-street parking, e.g. car park near those homes</li> </ul>	<ul style="list-style-type: none"> <li>• Tourists/customers/visitors/non-residential commuters, e.g. car park and ride</li> <li>• Private Hire Vehicle (PHV)/ taxi drivers using ranks</li> <li>• Commercial vehicle drivers (including cars and vans), excluding at the businesses' address</li> </ul>	<ul style="list-style-type: none"> <li>• Off-street residential chargepoints e.g. on a persons drive</li> <li>• Workplace chargepoints</li> <li>• Rapid chargepoints along motorways and non-residential A-roads</li> <li>• Chargepoints for buses</li> <li>• Chargepoints for blue light services</li> <li>• Chargepoints for heavy goods vehicles</li> </ul>

# Approach to conditions

We have developed a series of conditions that will be used to assess LEVI project proposals against, to ensure they align with the LEVI Fund objectives.

A number of the LEVI fund conditions are flexible. This is to allow local authorities to determine the best approach to charging infrastructure for their region.

Support and information on best practice is available to local authorities through the Support Body. Contact us by emailing [LEVI@est.org.uk](mailto:LEVI@est.org.uk)

# LEVI Capital conditions

Capital fund conditions	Detail
<b>Technology</b>	
Chargepoint power	<ul style="list-style-type: none"><li>• The lead local authority must ensure that the majority of the costs of a project are related to the installation of lower-powered infrastructure suitable for local charging (i.e. &lt;22 kW).</li><li>• Other chargepoint powers are acceptable in the minority.</li></ul>
Chargepoint technologies	<ul style="list-style-type: none"><li>• The lead local authority must ensure the chargepoint technologies used are in line with the objectives of the LEVI Fund. We expect that the majority if not all chargepoints will be 'standard' as this is likely to provide the greatest value for money. We will consider the following if clear justification is provided:<ul style="list-style-type: none"><li>• Gullies/in-pavement channels (inclusive of flush fitting solutions), wireless charging pads etc</li><li>• Energy technologies such as renewable energy generation, battery storage or solar car ports.</li></ul></li><li>• Note: Chargepoint technologies must be of a suitable technology readiness level (TRL &gt;7). Product design and development will not be funded, and non-charging technologies must be justified on a value for money basis.</li><li>• Gullies/ in-pavement channels must be associated with a chargepoint within a justified timeframe.</li></ul>
Carbon reduction	<ul style="list-style-type: none"><li>• In line with best practice, the lead local authority must request that suppliers evidence the consideration of carbon reduction within the installed chargepoint lifecycle. This should include, but not be limited to, chargepoint design, manufacture, transport, installation, operation and decommissioning.</li></ul>

# LEVI Capital Conditions

Strategy and location	
EV Strategic Planning	<ul style="list-style-type: none"><li>• The lead local authority must show evidence of strategic planning across the relevant parts of an authority.</li><li>• The lead local authority must demonstrate a commitment to work between local authority tiers.</li></ul>
Control over chargepoint locations	<ul style="list-style-type: none"><li>• Local authorities must either have responsibility for deciding chargepoint locations, to ensure they serve LEVI's target users, or choose to share this responsibility with the CPO.</li></ul>
DNO engagement	<ul style="list-style-type: none"><li>• The lead local authority must provide evidence of DNO engagement. Evidence of engagement should include:<ul style="list-style-type: none"><li>• Email correspondence or a letter of support from the DNO relating to the chargepoint strategy and project planning.</li><li>• Connection cost estimations e.g. through an estimation tool.</li></ul></li></ul>



# LEVI Capital Conditions

<b>Procurement approach and commercial arrangements</b>	
Competitive procurement	<ul style="list-style-type: none"><li>• The lead local authority must provide evidence of competitive procurement through the tendering process.</li></ul>
Procurement process and contract oversight	<ul style="list-style-type: none"><li>• Direct award should be avoided. Where this is not the case, the local authority must provide clear reasoning and evidence of value for money.</li><li>• Direct award will only be accepted in exceptional circumstances.</li></ul>
Commercial arrangements	<ul style="list-style-type: none"><li>• A range of commercial arrangements can be used, including but not limited to:<ul style="list-style-type: none"><li>• Own &amp; Operate</li><li>• Public Private Commercial Partnership (external operator or concession)</li><li>• Joint Venture</li><li>• Land Lease</li></ul></li></ul>
Public funding	<ul style="list-style-type: none"><li>• A suitable level of finance or private sector funding must be generated for the project, in accordance with the local market conditions.</li></ul>
Private funding	<ul style="list-style-type: none"><li>• The lead local authority must show evidence of value for money for the public funding.</li></ul>

# LEVI Capital Conditions

<b>Contractual terms 1/2</b>	
Contract length	<ul style="list-style-type: none"><li>• The lead local authority must ensure that an appropriate contract length is agreed.</li></ul>
Revenue and profit share	<ul style="list-style-type: none"><li>• The lead local authority must justify the approach to revenue share or profit share to show evidence of good value for money.</li></ul>
Control over tariffs charged to consumers	<ul style="list-style-type: none"><li>• All relevant local authorities must retain appropriate influence or control over tariffs throughout the duration of the contract to ensure consumer interests are protected.</li><li>• Tariff levels should be justified with reference to total energy cost (taking fluctuations into account), with input from the local authority and the chargepoint operator (CPO) depending on the Commercial Arrangement.</li><li>• The process on how tariffs will be changed over time should be set out clearly in any contractual arrangements.</li></ul>
Time of use tariffs	<ul style="list-style-type: none"><li>• Consideration must be made for time of use tariffs.</li></ul>
CPO exclusivity and competition	<ul style="list-style-type: none"><li>• If an exclusive contract is chosen, the lead local authority must justify this approach and ensure the short and long-term consequences have been considered.</li></ul>

# LEVI Capital Conditions

<b>Contractual terms 2/2</b>	
Ownership of local connection assets	<ul style="list-style-type: none"><li>• All relevant local authorities must finish the contractual term with ownership of the Local Connection Assets, whether or not they have retained ownership throughout the contractual term.</li></ul>
Ownership of charging assets	<ul style="list-style-type: none"><li>• The option should be available for the local authority to take on ownership of the Charging Asset at the end of the term, should they wish to do so</li></ul>
Operation and maintenance costs	<ul style="list-style-type: none"><li>• The lead local authority must ensure that the operational and maintenance costs sit with the most suitable party, according to the commercial arrangement.</li><li>• The division of responsibility, control and risk must be evidenced in the application.</li></ul>
Project delivery tracking	<ul style="list-style-type: none"><li>• The lead local authority must agree to report on the required KPIs, including but not limited to:<ul style="list-style-type: none"><li>• Number of sockets installed</li><li>• Number of chargepoints installed</li><li>• Power of chargepoints installed</li><li>• Location of chargepoints</li><li>• Month/year of anticipated installation</li><li>• LEVI funding request</li></ul></li><li>• Private investment</li></ul>

# Capital fund eligible costs

Purchase of the chargepoint

Other hardware associated with the installation

The associated electrical connection components including distribution network operator (DNO) connection

Civil engineering works related to the installation

Labour of the installation

Where applicable, the capital costs of a parking bay and traffic regulation orders (TROs), for example paint and signage

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# Application process



# Capital fund application process

Capital funding is accessed through three stages:



Local authorities assigned to tranches one (FY23/24) or two (FY24/25) to determine the application timeline

90% funding released to local authorities & tender launched

Final 10% funding released to local authorities

# Application stage one: expression of interest

Local authorities must show evidence of how they plan to use their LEVI capital funding by filling out an expression of interest (EOI) form. All local authorities will need to submit their EOI by 26 May 2023.

During the EOI stage, local authorities will be asked if they'd like to receive their capital funding in either the 2023/2024 financial year (referred to as tranche one during the application process) or the 2024/2025 financial year (known as tranche two during the application process).

Local authorities should indicate their preferred tranche based on how prepared they are to submit a full LEVI Capital Fund application and receive funding.

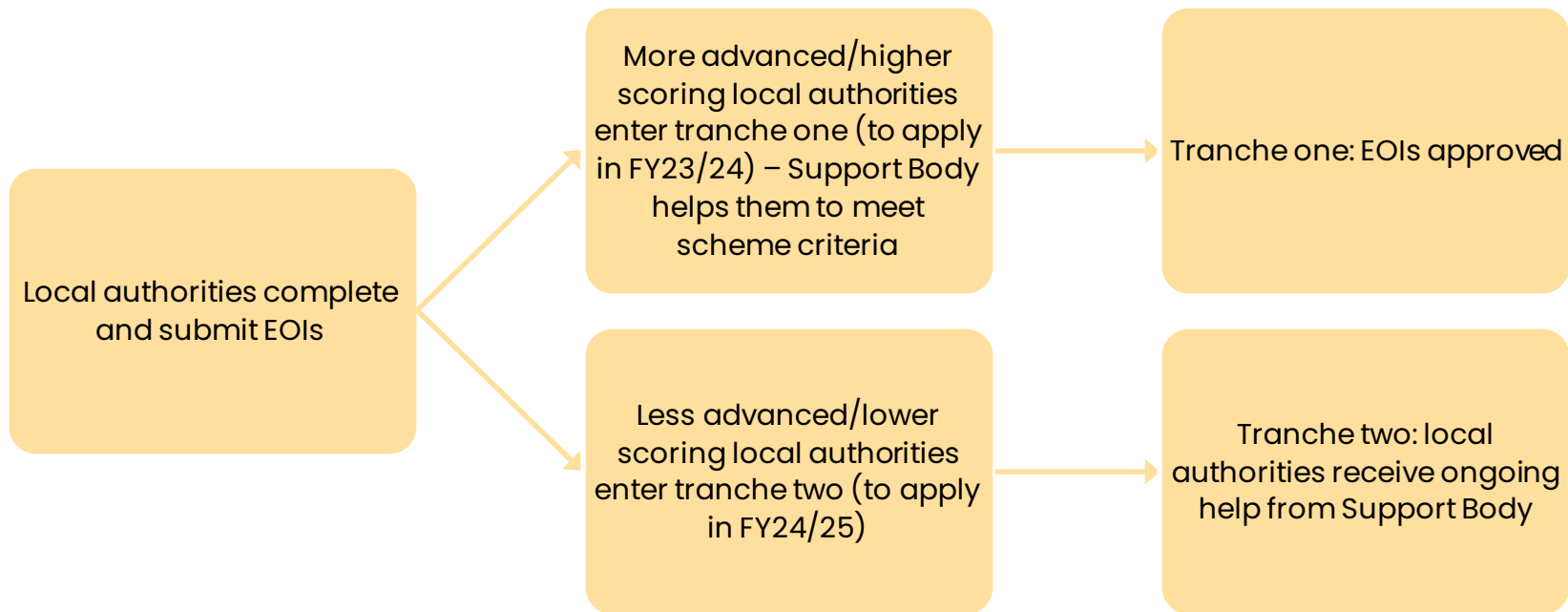
The LEVI Support Body will assess the EOIs and determine which tranche the local authority will progress in. The Support Body will notify local authorities of their tranche, and then help local authorities with the next stage of their application.

Download the LEVI [Expression of Interest form](#).

Local authorities should provide as much information as they can in the EOI.

**Gaps in the form are okay to have. This will let the Support Body know how to help.**

# Stage one





# Application stage two: full LEVI fund application form and tender document review

Local authorities that have been assigned a tranche will be given access to the stage two application form. The application form will ask local authorities to develop a business case and produce a draft tender document for review.

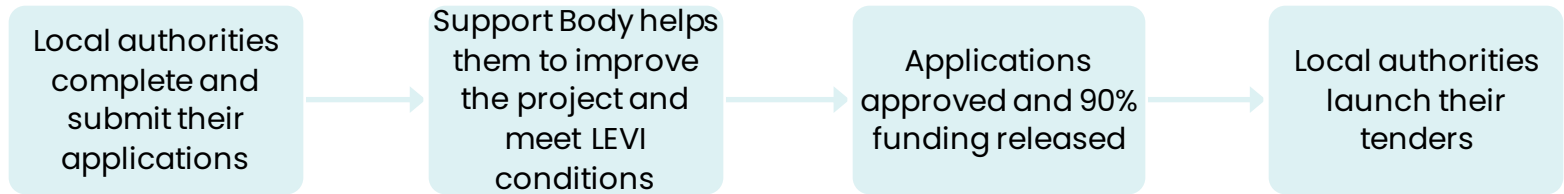
Stage two applications are welcomed as soon as they are ready. The final deadline for stage two applications for 2023/2024 funding (tranche one) is 17 November 2023. The application deadline for 2024/2025 funding (tranche two) will be announced soon.

Once the stage two application form has been approved, 90% of funding will be released and the local authority can open procurement for a provider. The final 10% of funding will be delivered following stage three of the application process (see next slide).

# Stage two

This stage is the same for applicants in tranches one and two. But those in tranche one will progress through in FY23/24 while those in tranche two will not receive funding until FY24/25.

Tranche two applicants will still receive ongoing help from the Support Body to develop EV strategies, plan procurement and prepare EV infrastructure resource etc, before starting stage two.



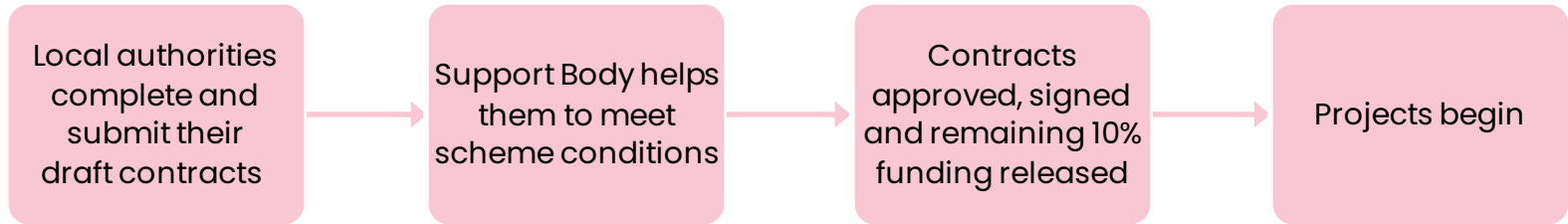
# Application stage three: contract review

Local authorities that have completed stages one and two will submit their draft EV infrastructure contract to the Support Body for review and approval. This will be assessed to determine whether the commercial arrangement between local authorities and private sector partners meet the fund criteria.

Once the criteria have been met, the Support Body will give local authorities approval to sign their contract. Following this stage, the final 10% of funding will be paid to the local authority.

# Stage three

This stage is the same for applicants in tranches one and two. The tranche 1 final deadline for contracts to be agreed in order to receive the final 10% of project funding is September 2024.



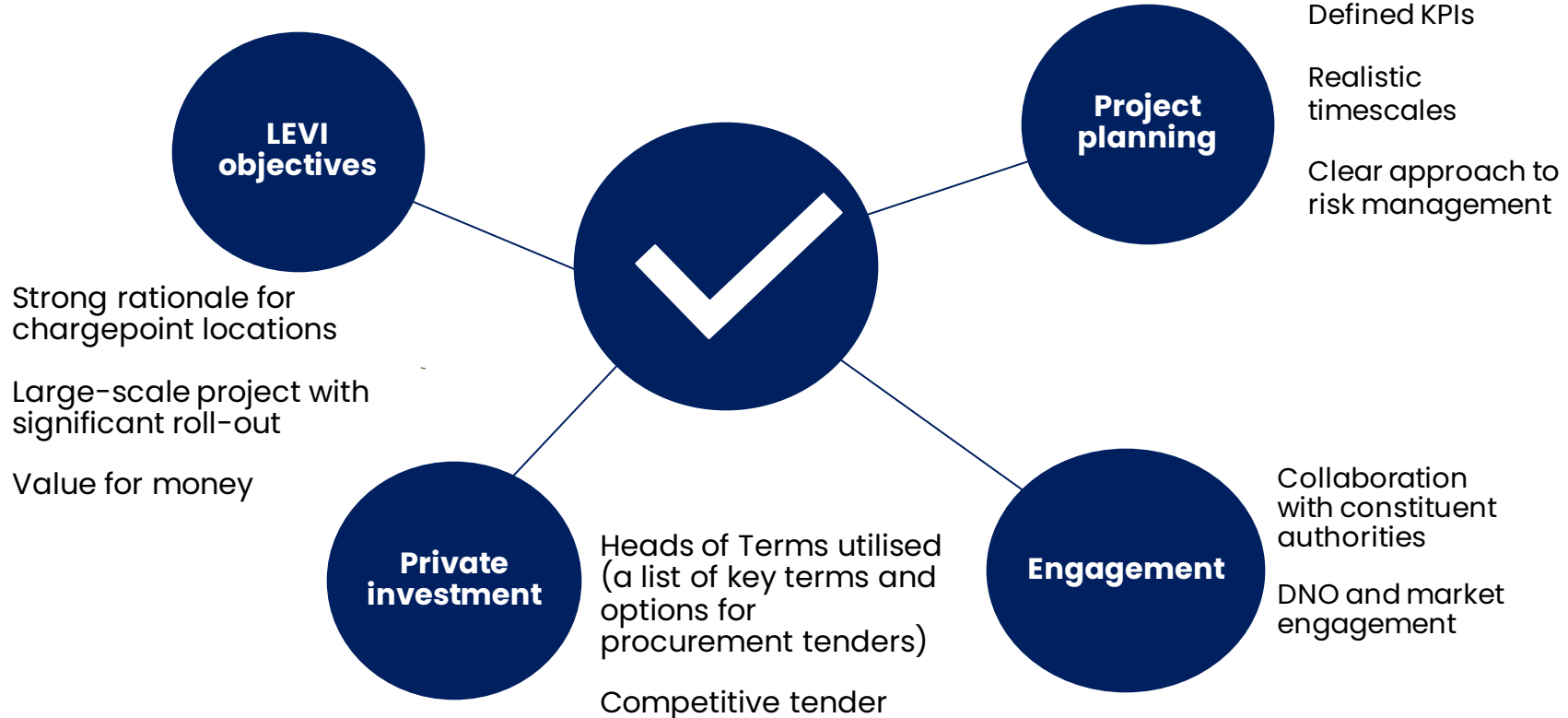
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# Assessment criteria



# What makes a good LEVI fund application



# Application stage one scoring

The Support Body will give an initial score of between 1-4 to each EOI after assessing them against the stage one criteria. The principles guiding the 1-4 assessment criteria are outlined below.

1	2	3	4
<ul style="list-style-type: none"><li>• The project does not meet most of the LEVI objectives</li><li>• Because of this, it is likely the project will be ready later in tranche 2</li></ul>	<ul style="list-style-type: none"><li>• The project meets some of the LEVI objectives. Some parts of the proposal are acceptable to good</li><li>• However, there is at least one major concern with regards to the project meeting the LEVI Fund objectives</li><li>• This means it is likely the project will be ready earlier on in tranche 2</li></ul>	<ul style="list-style-type: none"><li>• The project meets most to all of the LEVI objectives. The project proposal is mostly good to great.</li><li>• Some work is likely required to ensure that the application can be approved</li><li>• It is likely that the project will be ready later in tranche 1</li></ul>	<ul style="list-style-type: none"><li>• The project meets most to all of the LEVI objectives. The project proposal is overall excellent. A few changes could be made to make it even better.</li><li>• It is likely that the project will be ready earlier in tranche 1</li></ul>

# Application stage one scoring

Applicants that receive a score of one or two will be entered into tranche two and will receive ongoing support from the Support Body throughout FY23/24. The Support Body will help these applicants to raise their EOIs to a score of three or four, so they are in a position to submit a stage two application form in tranche two.

Applicants that receive a score of three or four will be entered into tranche one and will work with the Support Body until they meet the excellent demonstration indicators (see next slide). These are designed to ensure that EOIs are as strong as possible before local authorities progress to stage two of the application process.

Local authorities will also have the opportunity to indicate which tranche they'd like to be in. This will be taken into account during this process.



# Stage one excellent demonstration indicators

The local authority demonstrates that they meet the assessment criteria at an excellent standard and are ready to progress to the next stage.

Assessment criteria	Excellent demonstration indicators
Strategic fit	<p>For each local authority a clear, well-presented, signed off EVI strategy is detailed (inclusive of document) setting out:</p> <ul style="list-style-type: none"><li>• The future demand for EVI</li><li>• A clear approach to meet the demand</li><li>• The proposed infrastructure and technology solutions</li><li>• Wider considerations such as equity of supply, geographic specific aspects</li><li>• A detailed explanation of how LEVI funding supports/links to their overall strategy</li></ul> <p>Clear collaboration has been detailed with constituent tier 2 authorities and other authorities involved in collaborative bids.</p>
Expected commercial arrangements	<p>This section shows:</p> <ul style="list-style-type: none"><li>• Consideration of different procurement routes and provision of relevant evidence to support the preferred approach.</li><li>• The proposed approach to procurement maximises the charging provision secured in the areas of need for the subsidy available.</li><li>• Consideration of different commercial arrangements and provision of relevant evidence to support the preferred approach. Key terms within the commercial arrangement are known and detailed.</li><li>• Strong alignment to the principles of the OZEV Heads of Terms or clear rationale and explanation for any areas of deviation.</li><li>• Engagement with the DNO for the proposed LEVI project has occurred, or DNO engagement is being planned in a suitable timeframe.</li><li>• Engagement with the DNO for the proposed LEVI project has occurred, or DNO engagement is being planned in a suitable timeframe.</li></ul>

# Stage one excellent demonstration indicators

The local authority demonstrates that they meet the assessment criteria at an excellent standard and are ready to progress to the next stage.

<b>Assessment criteria</b>	<b>Excellent demonstration indicators</b>
Value for money and additionality	<p>This section shows:</p> <ul style="list-style-type: none"><li>• The proposed minimum number of chargepoints to be installed are well considered and align with LEVI objectives.</li><li>• Where any supporting technology or passive infrastructure -has been detailed, the local authority gives a clear rationale as to how this will increase the commercial viability/case for the project</li><li>• Other sources of funding have been strongly considered to scale the project, inclusive of private investment, local authority prudential borrowing, and other public funding sources.</li><li>• Private investment aligns with the LEVI objectives.</li><li>• The proposed estimated subsidy per chargepoint is competitive or there is a strong rationale for higher costs.</li></ul>

# Application stage two scoring

The Support Body will give an initial score of between one to four on each application (like in stage one) after assessing them against the stage two criteria. The criteria will be added into this Information Pack in due course.

Applicants that receive a score of one or two will be asked to apply later during tranche two (FY24/25).

Applicants that receive a score of three or four will work with the Support Body until they meet the excellent demonstration indicators (see next slide). These are designed to ensure applications are as strong as possible before local authorities progress to stage three of the application process.

# Stage two excellent demonstration indicators

Assessment criteria	Excellent demonstration indicators
Strategic case	<ul style="list-style-type: none"><li>• The project aligns with local EVI strategy and considers the requirements of the broader transport objectives, and how LEVI is being used to fill any service gaps.</li><li>• The project clearly benefits those without access to off-street parking, demonstrating current availability of EVI in the area.</li><li>• A clear description of how local authority intervention is essential to make the project a success is provided.</li></ul>
Expected commercial arrangements	<p>This section shows:</p> <ul style="list-style-type: none"><li>• Consideration of different commercial arrangements and provision of relevant evidence to support the preferred approach from market engagement.</li><li>• Strong alignment to the principles of the Heads of Terms or clear rationale and explanation for any areas of deviation.</li><li>• The key terms of commercial arrangement are clearly defined, inclusive of justification.</li><li>• Consideration of different procurement routes and provision of relevant evidence to support the preferred approach.</li><li>• Evidence of broad market engagement to test commercial arrangements and procurement approach to mitigate key risks.</li><li>• Evidence of previous engagement with DNOs and previous projects completed.</li></ul>

# Stage two excellent demonstration indicators

<b>Assessment criteria</b>	<b>Excellent demonstration indicators</b>
Meeting consumer needs	<p>This section shows:</p> <ul style="list-style-type: none"><li>• Locations showing provision of infrastructure that benefits those without off-street parking, inclusive of land arrangements.</li><li>• Evidence of local authority input in chargepoint location and decision process for sites, showing sites that are not just commercially viable/attractive.</li><li>• Evidence providing justifications for utilisation rates.</li><li>• Clear consideration to accessibility for charging infrastructure and built environments to the community where feasible.</li></ul>
Strength of the delivery plan	<p>This section shows:</p> <ul style="list-style-type: none"><li>• Excellent and realistic project timelines have been submitted.</li><li>• The project team and project delivery arrangements are clearly defined, inclusive of responsibilities between project stakeholders (CPO, DNO and other third parties).</li><li>• Stakeholder engagement within the delivery plan is clearly outlined and inclusive of engagement with DNOs.</li><li>• The risk register has been submitted, highlighting clearly the biggest risks and how these will be managed throughout the project.</li><li>• The relevant KPIs have been supplied.</li></ul>

# Stage two excellent demonstration indicators

Assessment criteria	Excellent demonstration indicators
Value for money and additionality	<p>This section shows:</p> <ul style="list-style-type: none"><li>• The proposed approach to procurement should maximise the charging provision secured in the areas of need for the subsidy available.</li><li>• The proposed minimum number of chargepoints to be installed are well considered and align with LEVI objectives.</li><li>• Other sources of funding have been strongly detailed to scale the project, inclusive of private investment, local authority prudential borrowing, and other public funding sources.</li><li>• Private investment aligns with LEVI objectives.</li><li>• The estimated subsidy per chargepoint is competitive or there is a strong rationale for higher costs.</li><li>• The project clearly provides additionality, and why the project cannot be funded solely by the private sector is detailed.</li><li>• Where other technology is included, it has been detailed and demonstrates how it extends the commercial viability/ case for the project</li><li>• Where passive infrastructure and 'other technology' has been detailed, the local authority gives a clear rationale as to how this will increase the commercial viability/case for the project</li></ul>

# Application stage three criteria and scoring – contract review

The Support Body will assess local authority draft contracts and supplementary questions to give a pass or fail mark.

The Support Body will continue to work with local authorities until all assessment criteria points can be passed.

Local authorities will receive the remaining 10% of capital funding once their draft contracts are approved.

The stage three assessment criteria are outlined below:

# Stage three criteria

Criteria	Detail
<b>Strategy and location</b>	
Control over chargepoint locations	<ul style="list-style-type: none"><li>Local authorities either have responsibility for deciding chargepoint locations and ensuring these target LEVI users or has chosen to share this responsibility with the CPO.</li></ul>
EV strategic planning	<ul style="list-style-type: none"><li>The lead local authority has shown evidence of strategic planning across the relevant parts of an authority.</li><li>The lead local authority has demonstrated a commitment to work between local authority tiers.</li></ul>
DNO engagement	<ul style="list-style-type: none"><li>The lead local authority has provided evidence of DNO engagement. Evidence of engagement should include:<ul style="list-style-type: none"><li>Email correspondence or a letter of support from the DNO relating to the chargepoint strategy and project planning.</li><li>Connection cost estimations e.g. through an estimation tool.</li></ul></li></ul>



# Stage three criteria

Criteria	Detail
<b>Procurement and commercial arrangement</b>	
Competitive procurement	<ul style="list-style-type: none"><li>• The lead local authority has provided evidence of competitive procurement through the tendering process.</li></ul>
Procurement process and contract oversight	<ul style="list-style-type: none"><li>• Direct award has been avoided. Where this is not the case, the local authority has provided clear reasoning and evidence of value for money.</li><li>• Direct award will only be accepted in exceptional circumstances.</li></ul>
Private funding	<ul style="list-style-type: none"><li>• A suitable level of private sector funding has been generated for the project, in accordance with the local market conditions.</li></ul>
Public funding	<ul style="list-style-type: none"><li>• The lead local authority has shown evidence of value for money for the public funding.</li></ul>
Commercial arrangements	<p>A range of commercial arrangements can be used, including but not limited to:</p> <ul style="list-style-type: none"><li>• Own &amp; Operate</li><li>• Public Private Commercial Partnership (external operator or concession)</li><li>• Joint Venture</li><li>• Land Lease</li></ul>

# Stage three criteria

Criteria	Detail
<b>Contractual terms</b>	
Control over tariffs charged to customers	<ul style="list-style-type: none"><li>• All relevant local authorities have retained appropriate influence or control over tariffs throughout the duration of the contract to ensure consumer interests are protected.</li><li>• Tariff levels are justified with reference to wholesale electricity prices (taking fluctuations into account), with input from the local authority and the chargepoint operator (CPO) depending on the Commercial Arrangement.</li><li>• How tariffs will be changed over time are set out clearly in contractual arrangements.</li></ul>
CPO exclusivity and competition	<ul style="list-style-type: none"><li>• If an exclusive contract is chosen, the lead local authority has justified this approach and ensured the short and long-term consequences have been considered.</li></ul>
Ownership of local connection assets	<ul style="list-style-type: none"><li>• The contract is clear that all relevant local authorities will finish the contractual term with ownership of the Local Connection Assets, whether or not they have retained ownership throughout the contractual term.</li></ul>
Ownership of charging assets	<ul style="list-style-type: none"><li>• The contract is clear which entity has ownership of the charging asset at the end of the term</li></ul>
Time of use tariffs	<ul style="list-style-type: none"><li>• Consideration must be made for time of use tariffs</li></ul>

# Stage three criteria

Criteria	Detail
Operation and maintenance costs	<ul style="list-style-type: none"><li>• The lead local authority has ensured that the operational and maintenance costs sit with the most suitable party, according to the commercial arrangement.</li><li>• The division of responsibility, control and risk is evidenced in the contract.</li></ul>
Contract length	<ul style="list-style-type: none"><li>• The lead local authority has ensured that an appropriate contract length has been agreed.</li></ul>
Revenue and profit share	<ul style="list-style-type: none"><li>• The lead local authority has justified the approach to revenue share and profit share to show evidence of good value for money.</li></ul>
Project delivery tracking	<ul style="list-style-type: none"><li>• The lead local authority has agreed to report on the required KPIs, including but not limited to:<ul style="list-style-type: none"><li>• Number of sockets installed</li><li>• Number of chargepoints installed</li><li>• Power of chargepoints installed</li><li>• Location of chargepoints</li><li>• Month/year of anticipated installation</li><li>• LEVI funding request</li><li>• Private investment</li></ul></li></ul>

# Stage three criteria

Criteria	Detail
<b>Technology</b>	
Chargepoint power	<ul style="list-style-type: none"><li>• The lead local authority has ensured that the majority of the costs of a project are related to the installation of lower-powered infrastructure suitable for local charging (i.e. &lt;22 kW).</li><li>• Other chargepoint powers are acceptable in the minority.</li></ul>
Chargepoint technologies	<ul style="list-style-type: none"><li>• The lead local authority has ensured that the chargepoint technologies used are in line with the objectives of the LEVI Fund.</li><li>• Chargepoint technologies can include the following, where evidence shows the objectives of the LEVI Fund are met:<ol style="list-style-type: none"><li>1. Different charger types such as standard chargers, gullies/in-pavement channels (inclusive of flush fitting solutions), wireless charging pads etc</li><li>2. Energy technologies such as renewable energy generation, battery storage or solar car ports.</li></ol></li><li>• Note: Chargepoint technologies must be of a suitable technology readiness level (TRL &gt;7). Product design and development will not be funded, and non-charging technologies must be justified on a value for money basis.</li><li>• Gullies/ in-pavement channels must be associated with a chargepoint within a justified timeframe.</li></ul>

# Stage three criteria

Criteria	What we're looking for
Contract review (cost and component breakdown)	<ul style="list-style-type: none"><li>• Number of chargepoints and sockets agreed within the contract, defined by power output submitted. This is inclusive of 'other' chargepoints.</li><li>• The final breakdown of private and public funding, inclusive of source and value, is provided.</li><li>• The breakdown of the total component costs per chargepoint power output is provided.</li><li>• If passive infrastructure, or other technology is detailed, the number of chargepoints and sockets that will be provided, plus the breakdown of component costs is provided.</li><li>• The final site list has been provided, inclusive of document with location coordinates.</li></ul>

energy  
saving  
trust



# Reporting requirements



# Reporting requirements

Local authority applicants will be required to provide data during their application, 90 days after their grant award and then quarterly.

The following slides will list all the data requirements.

## Project headlines

Data point	Frequency/point of collection
Number of overall sockets	At application stage 1, 2 and 3 Quarterly At completion
Number of chargepoints	At application stage 1, 2 and 3 Quarterly At completion
Location of chargepoints (or map)	At application stage 2 and 3
Month/Year of anticipated installation	At application stage 2 Quarterly At completion
Project length	At application stage 2 Quarterly At completion
Project top 3 risks	At application stage 2 Quarterly



# Costs and funding – NB these will be estimates ahead of contractual agreement

Data point	Frequency/point of collection
Total project costs	At application – anticipated costs at stage 2, final costs at stage 3 Quarterly At completion
LEVI Funding request	At application stage 2 and 3
Private investment	At application stage 2 and 3
Other public funding  (please provide breakdown of any loans)	At application stage 2 and 3
Total public funding	At application stage 2 and 3
Cost per chargepoint: hardware, electrical connection, installation, civils, site surveys, signs and bay marking, other	At application Quarterly At completion
Subsidy per chargepoint – to be disaggregated by type/power	At application Quarterly At completion
Funding ratio (public:private)	At application Quarterly At completion
Average costs of electrical connection per project	At application Quarterly At completion
kW per public £	At application

# Chargepoint information – NB these will generally be estimates ahead of completion

Data point	Frequency/point of collection
Number of chargepoints funded through LEVI – to be disaggregated by type/power	At application stage 1, 2 and 3 Quarterly At completion
Number of chargepoints installed through LEVI – to be disaggregated by type/power	Quarterly At completion
Number of funded and installed chargepoints that are PAS 1899/2022 compliant (Accessibility provision/Public Sector Equality Duty)	At application stage 2 Quarterly At completion
Other technologies & number of other technologies funded/installed (e.g. solar, battery, gullies etc.)	At application stage 1, 2 and 3 Quarterly At completion
Average time between funding and installation	At completion
Total project chargepoint capacity (kW)	At application and completion
Utilisation per chargepoint	At completion (estimated) and quarterly after that (actual use)

## Commercial/contract arrangement

Data point	Frequency/point of collection
CPO partner	At application stage 3 (or stage 1 and 2 if contract already in place)
Contract model/commercial arrangement	At application stage 1, 2 and 3
Procurement route/platform	At application stage 1, 2 and 3
Contract length	At application stage 1, 2 and 3
Land arrangements	At application stage 1, 2 and 3
Asset ownership (above & below ground)	At application stage 1, 2 and 3
Profit/revenue description	At application stage 1, 2 and 3
Proposed tariff and rationale	At application stage 1, 2 and 3
Maintenance arrangements	At application stage 1, 2 and 3
Number of companies that bid for the tender	At application stage 3