Transport for the North

Electric Vehicle Charging Infrastructure (EVCI) Model

Statement of Methodology

TRANSPORT FOR THE NORTH

Contents

TRANSPORT FOR THE NORTH

Contents

2025 – 2026 Modelling Updates

TRANSPORT FOR THE NORTH

Electric Vehicle Charging Infrastructure (EVCI) model

Contents

- Working procedure for model development
- Scenarios and sensitivities that will be included in the model
- Detailed diagrams showing inputs, processing steps, and outputs for each modelling step
- Tables listing inputs to the model and outputs produced by the model
- Key assumptions used
- Risks and limitations arising from input data and processing steps
- Planned programme of work
- Baseline assessment of charging demand and EVCPs installed in 2018
- Details describing supporting tools and additional development tools supporting EVCI

Model in brief

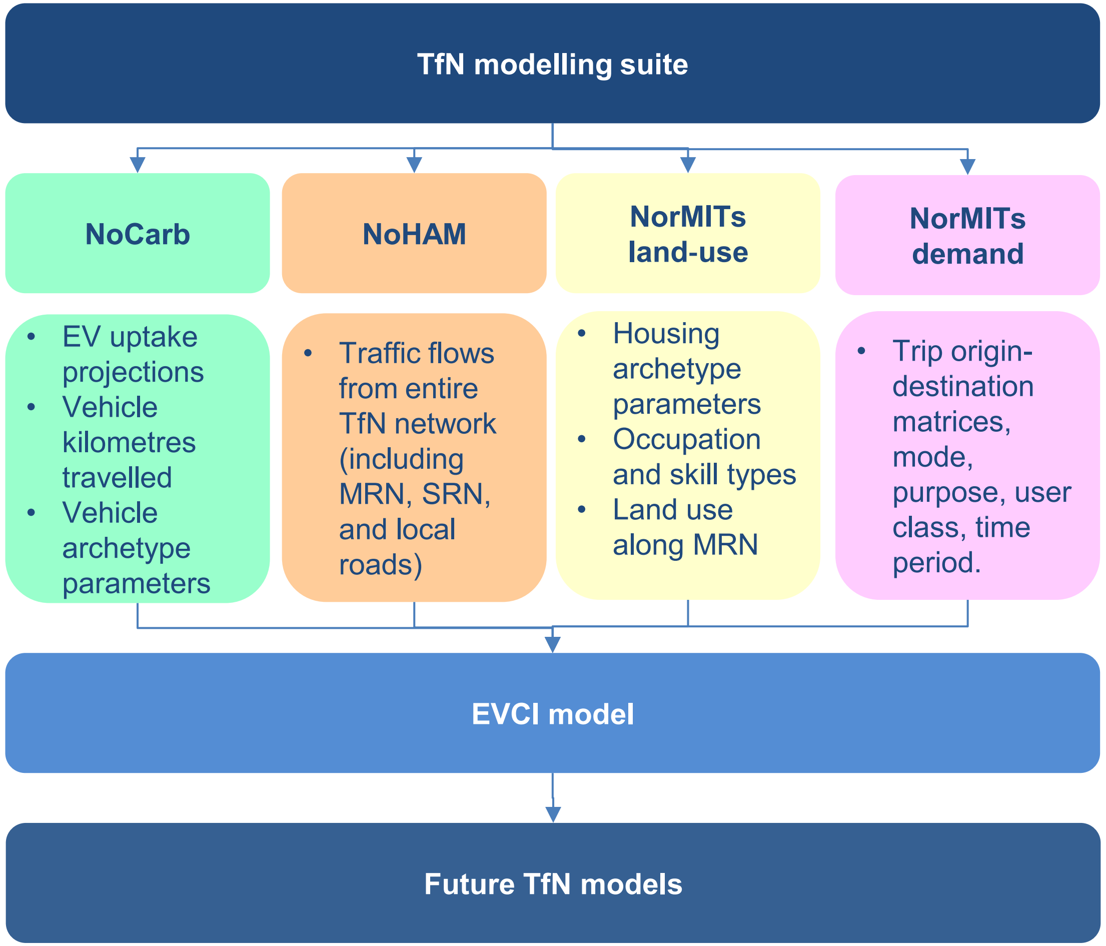
- The EVCI model projects charging infrastructure, energy demand needs, and supporting data for England.
- The model time horizon is 2023-50, using 5-year increments from 2025.
- It draws from several TfN models as inputs.
- TfN are the principal users of the model but Local Authorities, DNOs and other STBs and stakeholders also have access to model outputs.
- The model has been developed in Python and outputs are delivered as CSVs and shapefiles.
- The overall objectives of TfN's EV charging infrastructure framework are to:
  - Support delivery of an integrated EV network
  - Improve outcomes for Electric Vehicles based on robust and data driven evidence
  - Future-proof EV infrastructure decision making
  - Provide a collective road map towards an effective, attractive and inclusive network

The EVCI model builds on TfN's current modelling suite and facilitate development of future TfN models

Short description of TfN modelling tools used

- NoCarb: a vehicle fleet model that produces a baseline estimate for surface transport emissions and mileages and projects them into the future based on scenario inputs.
- NoHAM: highway assignment model to forecast future year travel conditions on the highway network to assess the travel time benefits of proposed schemes.
- NorMITs land-use: a tool that creates current year residential base population estimates, land use developments and car ownership.
- NorMITs demand: a tool that provides travel market demand estimates and OD matrices.

Integration of EVCI model with TfN modelling suite



Contents

The model is designed to integrate with existing TfN modelling using the TfN Future Travel Scenarios as input

Core Scenarios

TfN Future Travel Scenarios in the North

(all scenarios exceed current UK Government projections for zero emission vehicle sales as a result of current petrol/diesel phase out targets).

- Just About Managing (0.9 million ZEV in 2030)
- Live Local (1.1 million ZEV in 2030)
- Digitally Distributed (1.3 million ZEV in 2030)
- Metropolitan Mobility (1.7 million ZEV in 2030)

Inputs

- Each scenario represents a bundle of inputs relating to where people live, their trip distances and the proportion of trips by car
- These inputs can be changed using a single switch in the model to explore the different scenarios

Outputs

- Changes in charging demand and number of charge points across MSOAs for the 4 futures worlds described in TfN's Future Travel Scenarios.

Core Sensitivities

Core Sensitivities

- Where consumers will wish to charge in the future is currently uncertain. Scenarios will be used to explore these differences

Inputs

- **Baseline charging scenario** – this follows trends seen from charging trials to date
- **Home charging focused scenario** – Preference for residential (on/off street) charging increases at the expense of charging at destinations and rapid hubs
- **Public charging focused scenario** - Preference for destinations and rapid hub charging increases at the expense of residential (on/off street) charging

Outputs

- Changes in charging demand and number of charge points across MSOAs as a result of changes in charging behaviour and charging location preference.

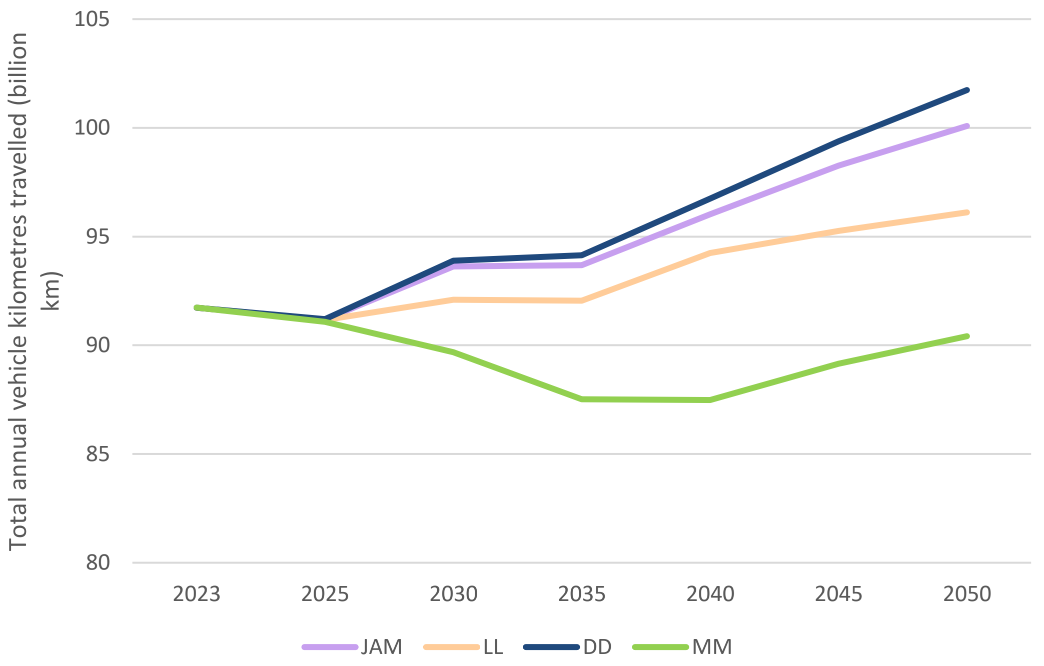
ZEV: Zero Emission Vehicle

Detailed information on TfN Future Travel Scenarios

Summary of main scenario attributes

Scenario	Key scenario assumptions
Just About Managing	• Retention of current transport behaviors assumed • Minor trend towards remote working • EV transition is market led, rather than by policy
Live Local	• Political and economic shift to ensure no place is left behind, through bespoke local economic strategies and delivery • Greater economic equity across cities, towns and rural communities
Digitally Distributed	• Digital technologies assumed to become a strong transforming driver • Modal shifts assumed in everyday life, commuting and travel
Metropolitan Mobility	• Strong public attitude and government response to climate change assumed • Dramatic modal shifts and high levels of transport emission reduction

Vehicle kilometres travelled

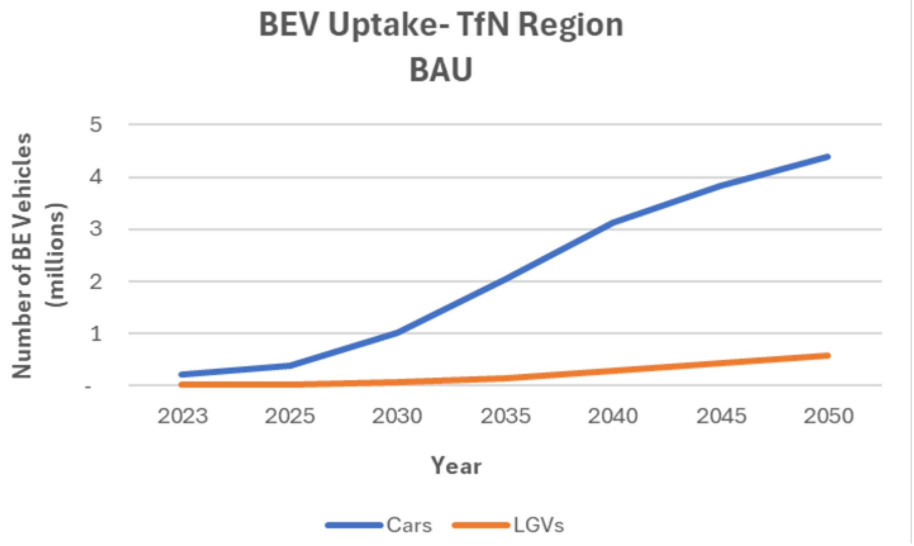


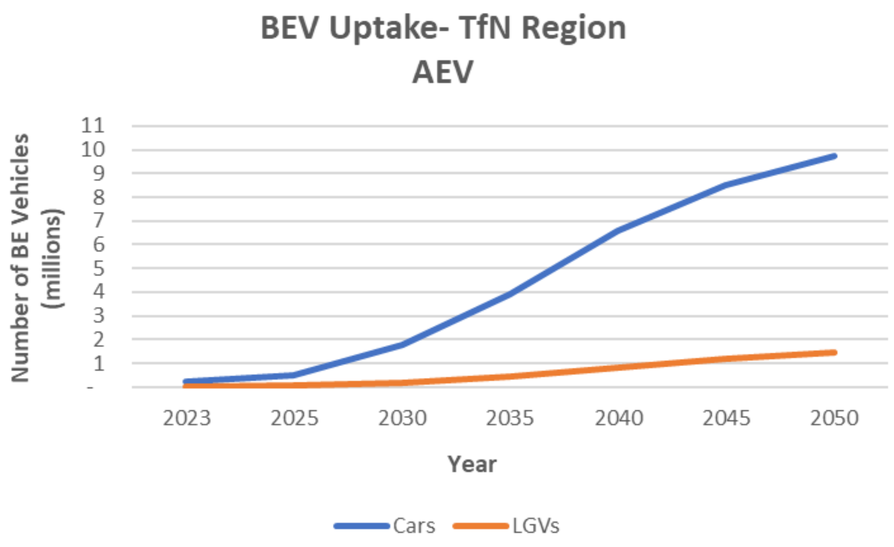
- In addition to differing levels of EV uptake (outlined on previous slide), the four scenarios show different levels of vehicle kilometers travelled
- All scenarios use the same vehicle stock projections and assume demand reduction takes place through reduction in vehicle kilometers – in effect kilometers travelled per vehicle is reduced

Detailed information on DfT Common Analytical Scenarios

Summary of main scenario attributes

Scenario	Key scenario assumptions
Business as Usual (BAU)	• Reflects central assumptions for exogenous drivers of demand and published 'firm and funded' policies. • A 'common comparator' to assess all project and options against. Remains the basis of the Appraisal Summary Table. • BAU BEV uptake for car: 23% 2025; 34% 2030; 40% 2040; 50% 2050.
Vehicle-led Decarbonisation / Accelerated EV (AEV)	• High and fast uptake of low-cost electric vehicles. • Uses the Core NTEM/TEMPro scenario • AEV BEV uptake for car: 41% 2025; 72% 2030; 100% 2040.





Vehicle kilometres travelled

Exploring EV fleet distribution approaches to understand EV uptake and charging demand

Core EV fleet projection (*applied in the July 2025 version of TfN's EVCI Framework*)

The EVCI model uses projected fleet and movement inputs in its charging calculations. The geographic distribution of the EV fleet determines how these vehicles fit into NoHAM's (TfN's highway model) flow and movement data. Consequently, changing the geographic distribution of EVs directly impacts charging demand.

Future fleet data is an input into EVCI from TfN's NoCarb model. The base fleet of 2023 is built from historic data of fleet composition. This fleet is split by vehicle type (car, LGV, HGV), fuel type and vehicle sub-segmentation.

Vehicles in this fleet are removed with time following a scrappage curve and new vehicles are injected in new sales/licensing based on the product of evolving tables of fleet size, fuel share, type share and sub-segmentation share. This creates a relatively even EV fleet distribution, with some characteristics built in from the baseline fleet.

Alternate income-based fleet projection (*for future collaboration and application*)

An alternative fleet distribution, based on SOC characteristics, has been created by analysis of DfT fleet licensing data and socioeconomic demographics (applying ONS UK Standard Occupational Classifications) within local authority regions.

This method assumes the purchasing and operation cost difference between electric and ICE cars and LGVs would result in different purchasing behavior in different socioeconomic demographics. A relationship between these was established using functional analysis between the two to create expected sales proportion weights for a model zone. To account for changing price parity over time, the relative strength of the weighting of these factors was adjusted based on future trends of electric-ICE cost comparisons.

The zonal fuel share is then adjusted according to these factors preserving the total number of EVs in the North but altering geographic location of the new sales injections.

Contents

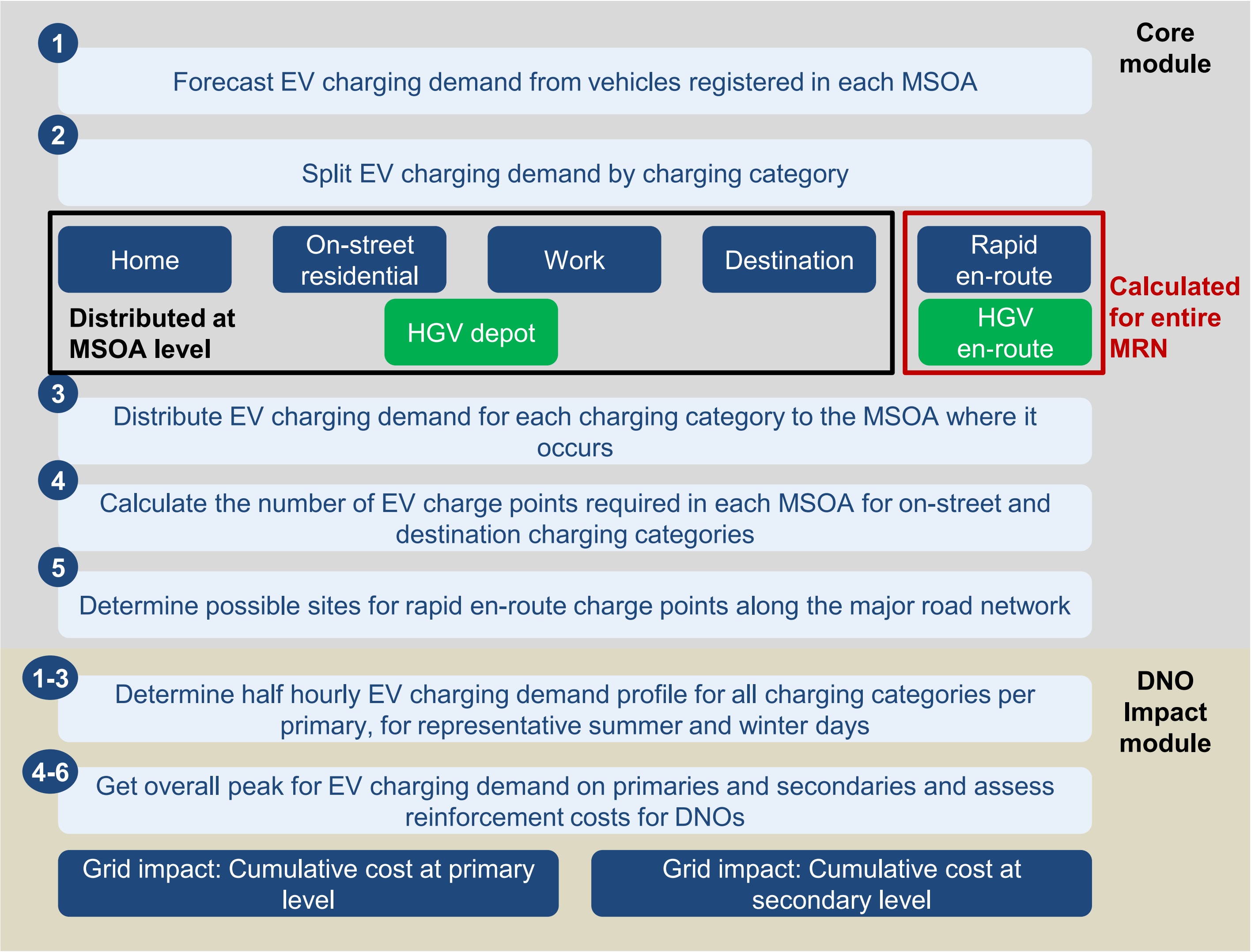
Overview of Task 2 - Development of EVCI Model

Description of high-level model structure

1. A ‘Core’ module, providing EV charge point numbers at MSOA level, with functionality to give indicative locations of charge points along the major road network (MRN).
2. A ‘DNO impact’ module, which will use EV charging demand and typical half hourly charging demand profiles to assess the potential impact of EV charging on the distribution network.

Model time horizon and future scenarios

- The model will produce outputs in 5-year increments, starting at 2025 and running to 2050 (i.e. 2025, 2030, 2035, 2040, 2045, 2050)
- In each model run, the user will select one of TfN’s Future Travel Scenarios to provide projections of future travel attributes (e.g. EV stock, vehicle kilometres travelled, trips on the road network, etc)



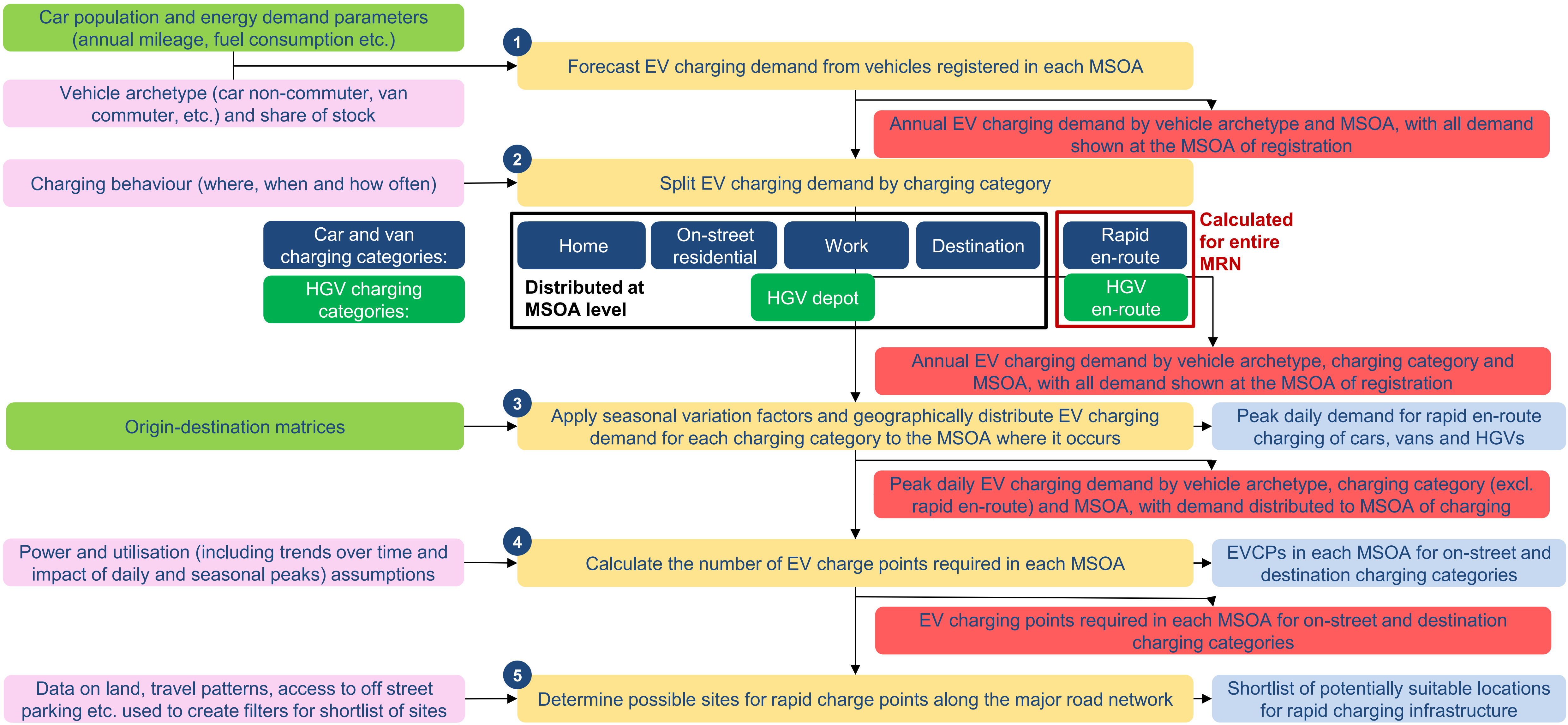
MSOA: middle layer super output area, used for reporting Census data. Each MSOA has a population between 5,000 and 15,000 and contains 2,000 – 6,000 households

High level Core Module diagram

Legend:

Note: Each scenario and year will be processed through the same pipeline to create the appropriate outputs

- Inputs changeable by modifying csv-s
- Scenario dependant input
- Passed processing data
- # Processing step
- Model output

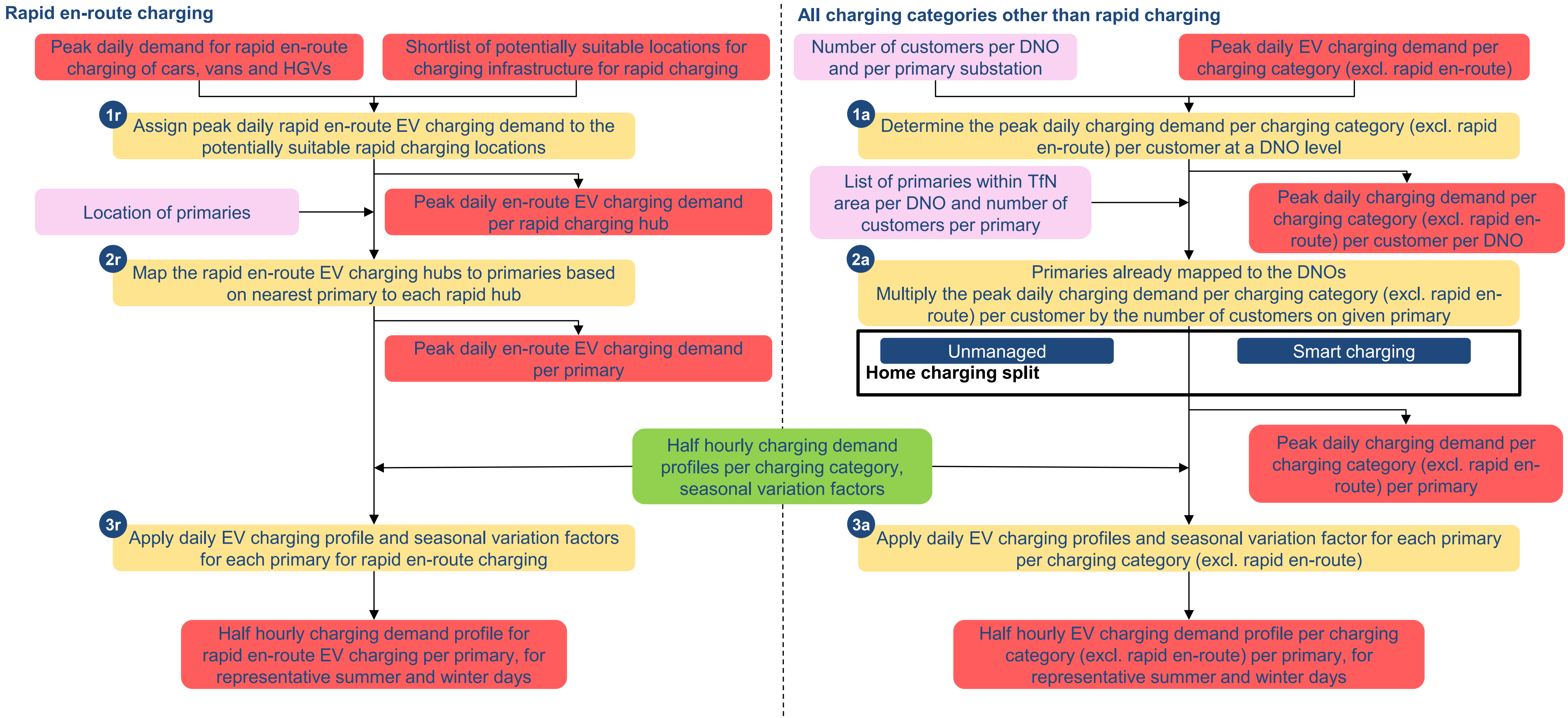


High level DNO Module diagram (1/2)

Legend:

Note: Each scenario and year will be processed through the same pipeline to create the appropriate outputs

- Inputs changeable by modifying csv-s
- Scenario dependant input
- Passed processing data
- # Processing step
- Model output



Note: On this diagram a customer refers to a specific network connection point, which is approximately a household

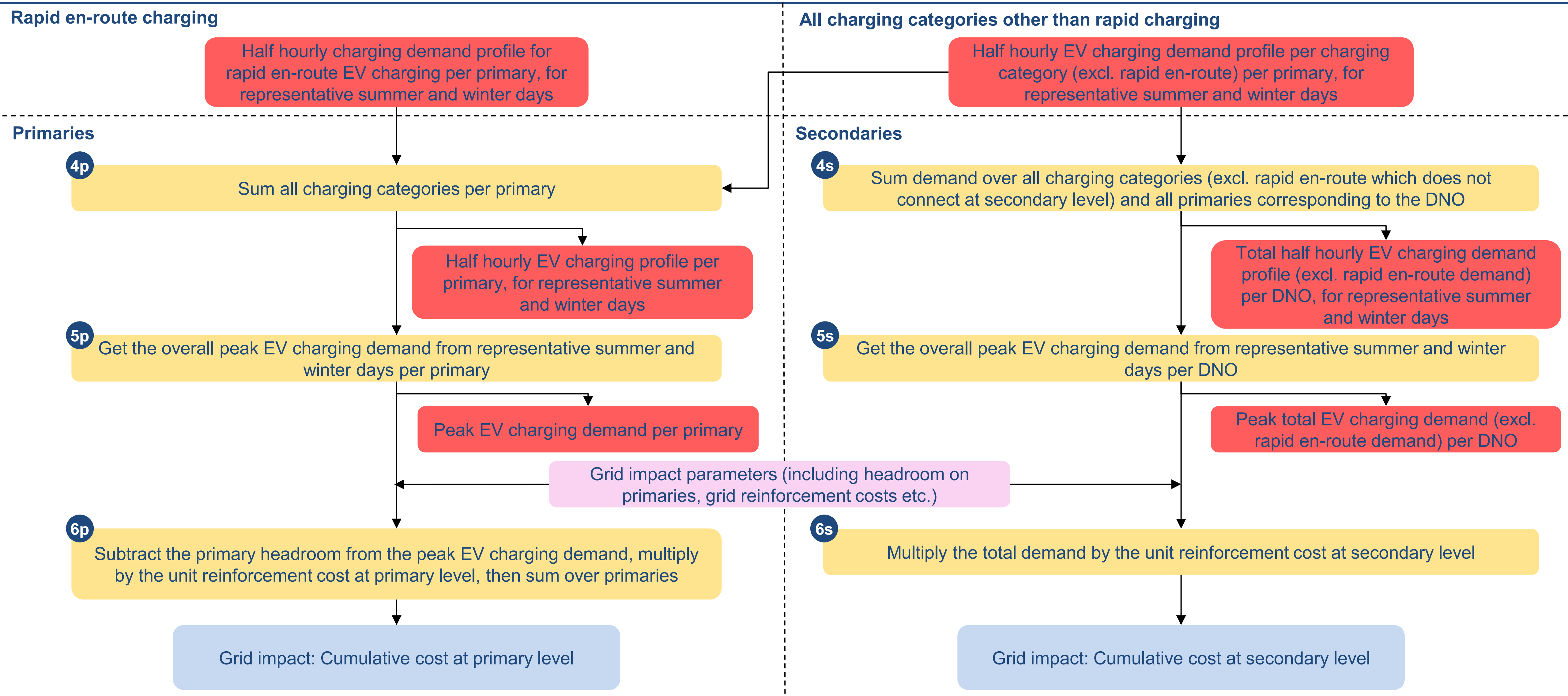
High level DNO Module diagram (2/2)

Legend:

Note: Each scenario and year will be processed through the same pipeline to create the appropriate outputs

Note: On this diagram a customer refers to a specific network connection point, which is approximately a household

- Inputs changeable by modifying csv-s
- Scenario dependant input
- Passed processing data
- # Processing step
- Model output

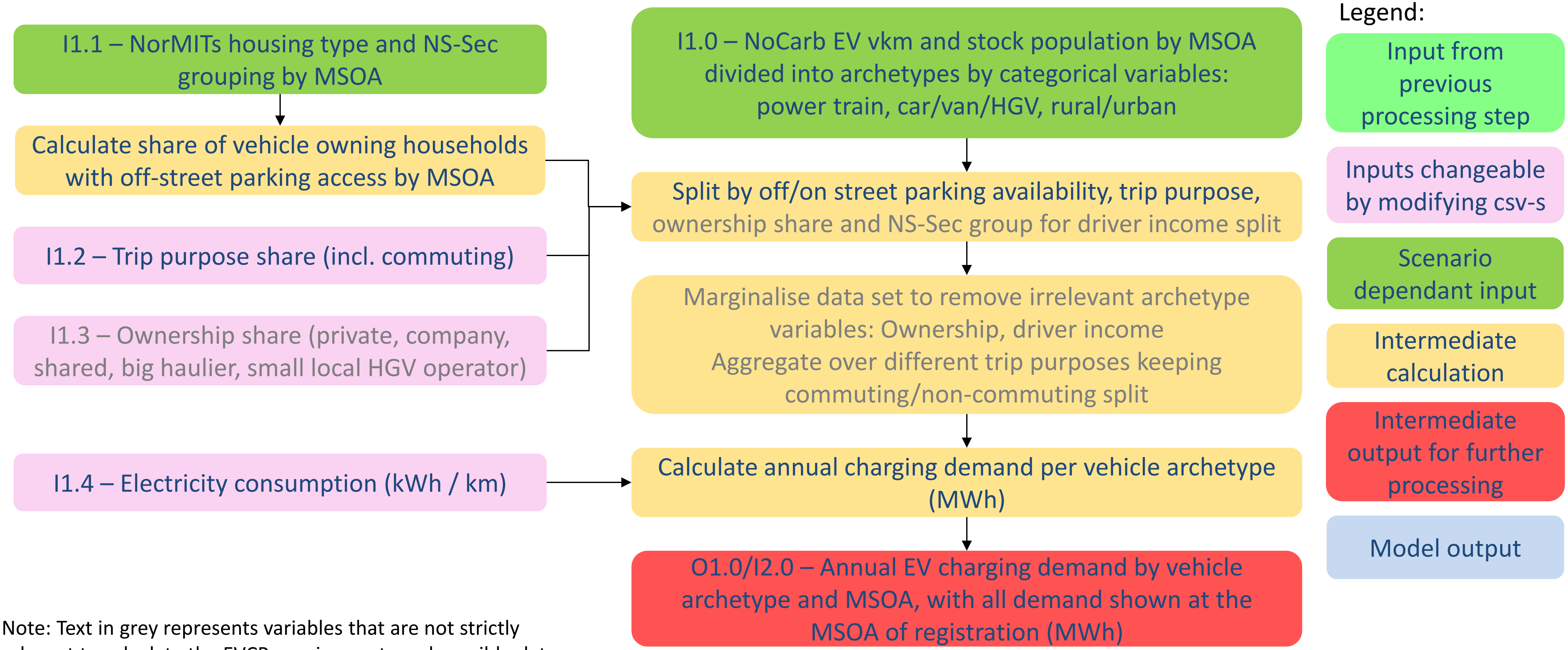


Contents

Contents

Core Module Step 1 – Forecast EV charging demand from vehicles registered in each MSOA

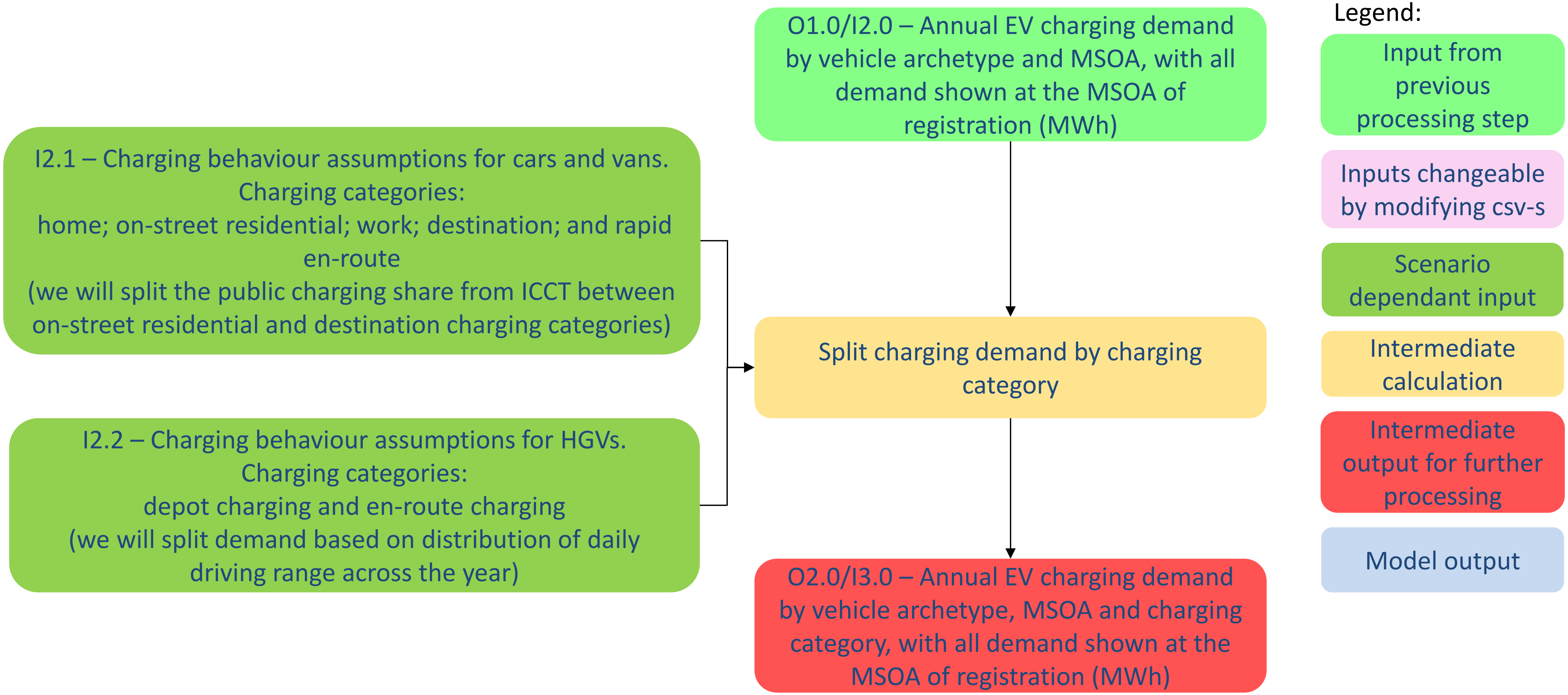
Note: Each scenario and year treated separately through the same processing chain



Note: Text in grey represents variables that are not strictly relevant to calculate the EVCP requirements and possible data complexity, which led to reduction based on run time

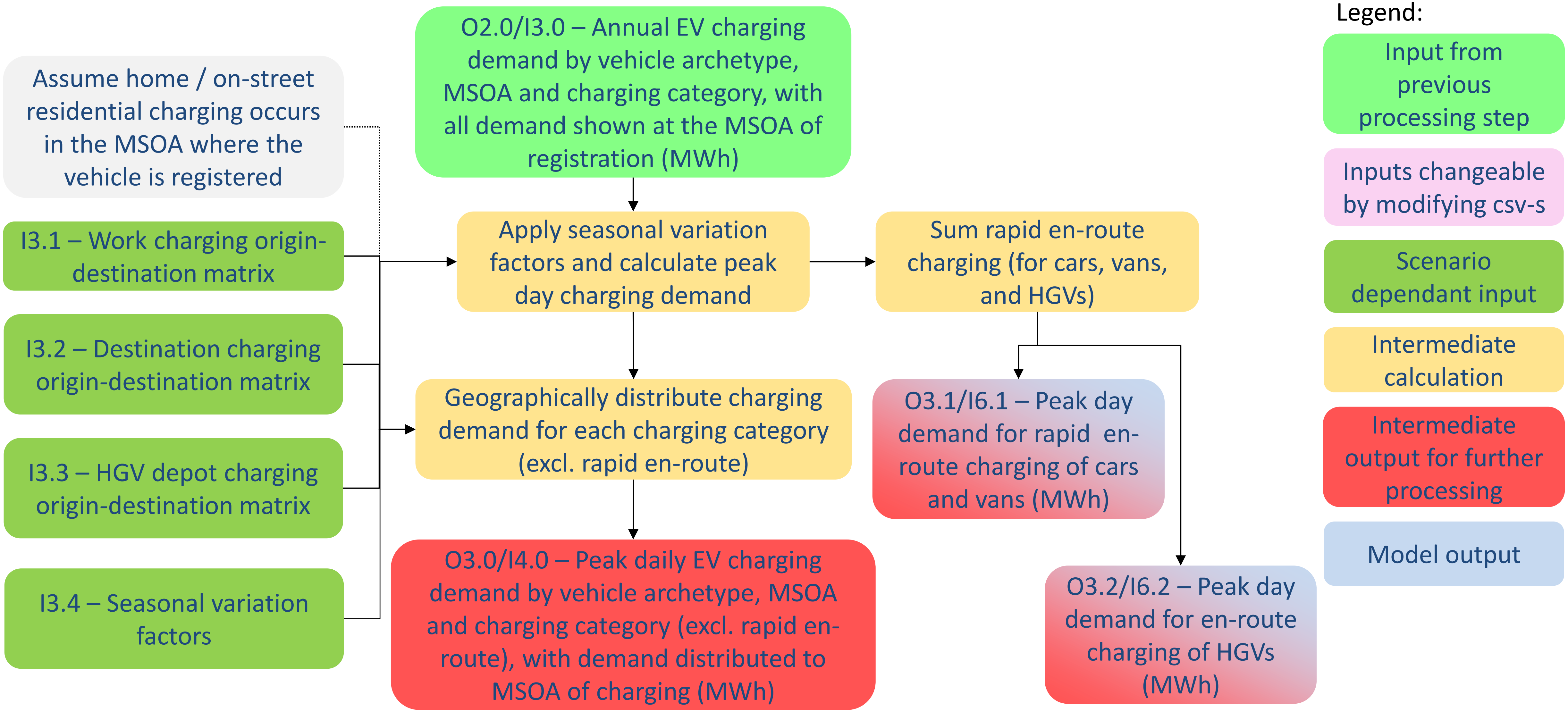
Core Module Step 2 – Split charging demand by charging category

Note: Each scenario and year treated separately through the same processing chain



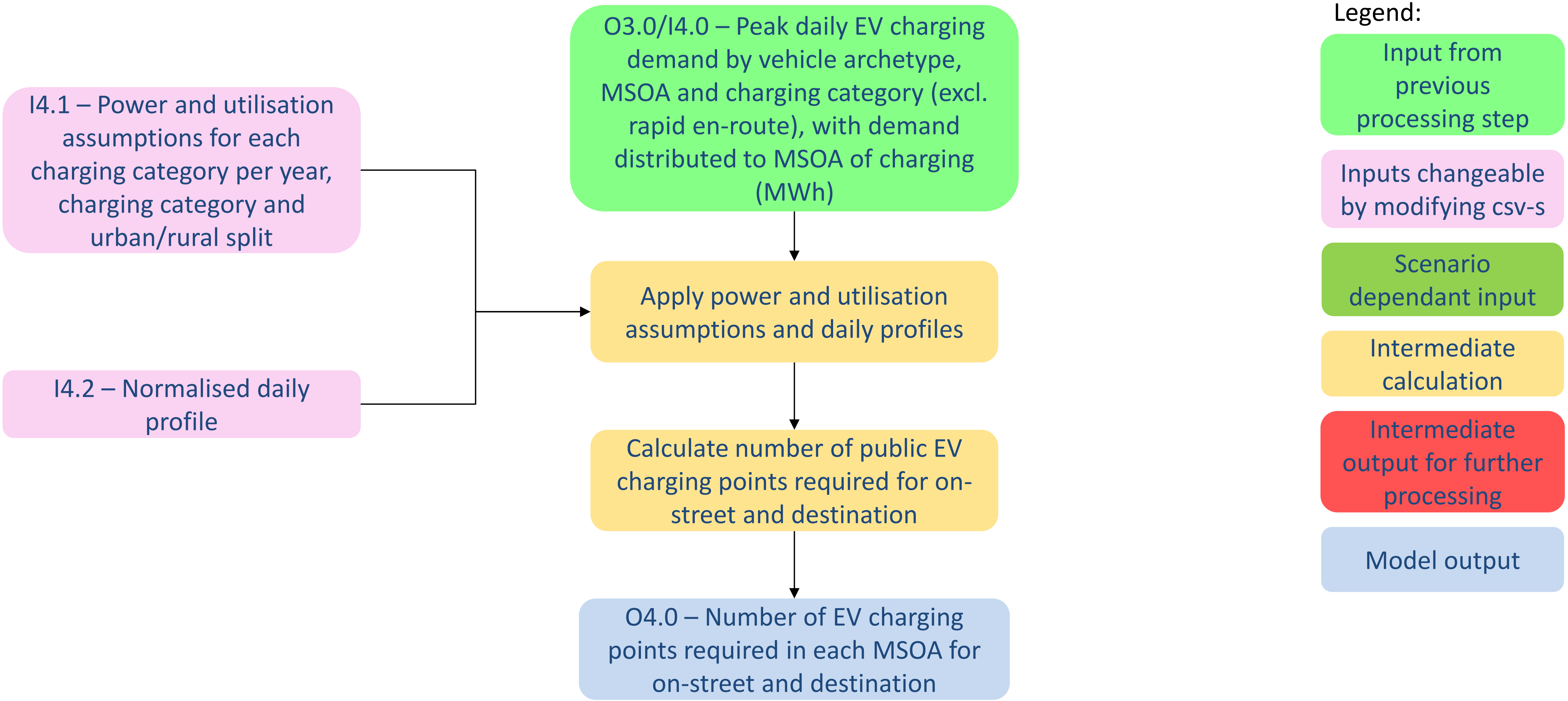
Core Module Step 3 – Geographically distribute charging demand for each charging category

Note: Each scenario and year treated separately through the same processing chain



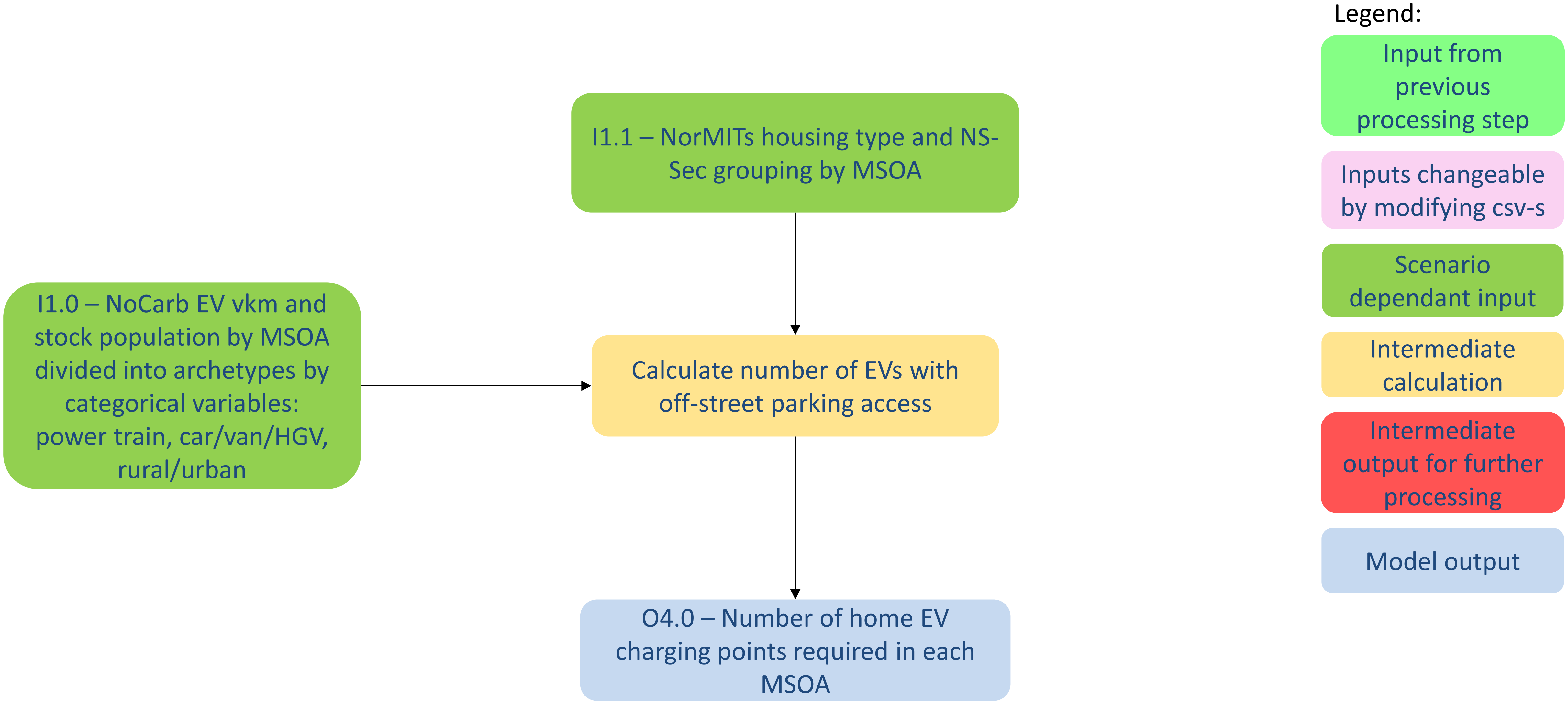
Core Module Step 4 – Calculate the number of public charge points required in each MSOA - All charging categories other than home charging

Note: Each scenario and year treated separately through the same processing chain

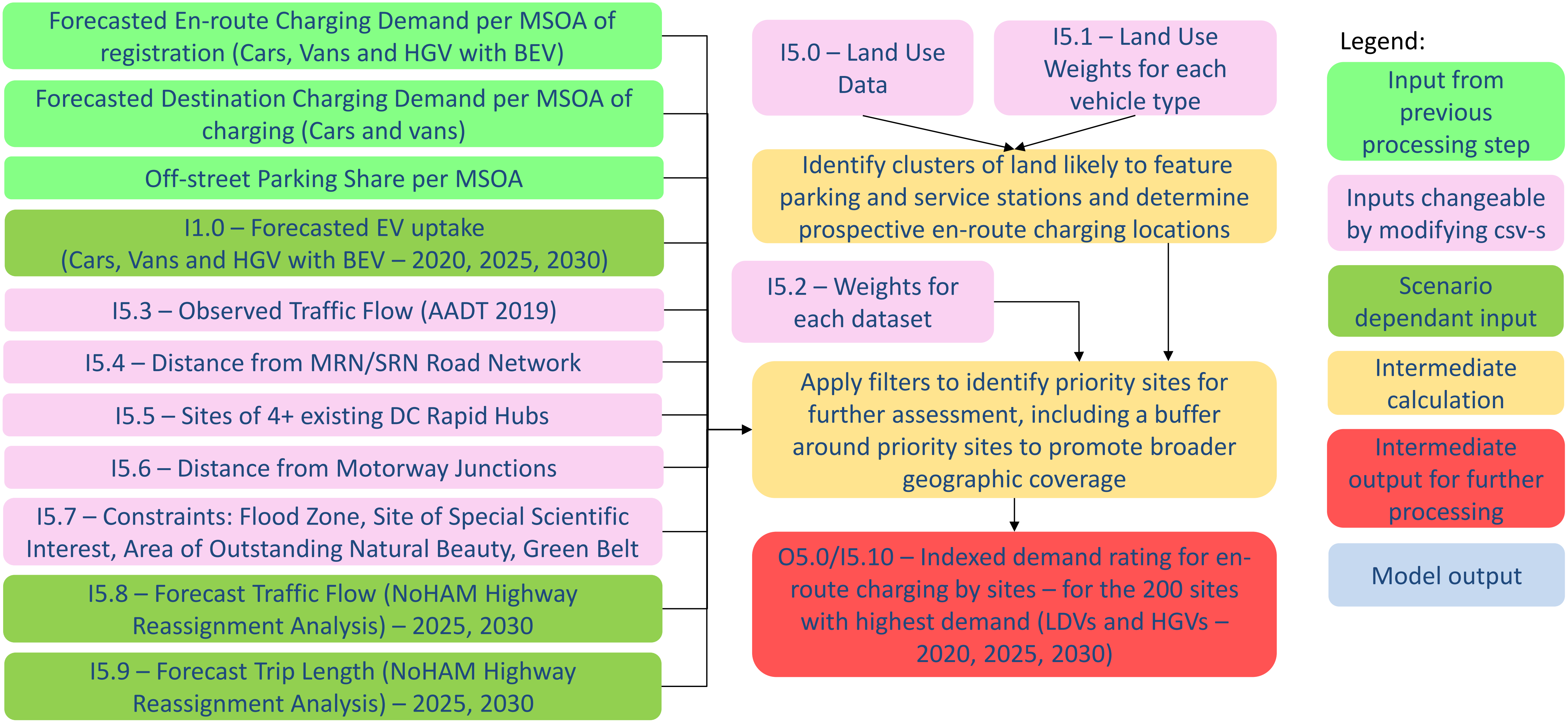


Core Module Step 4 – Calculate the number of public charge points required in each MSOA - Home charging

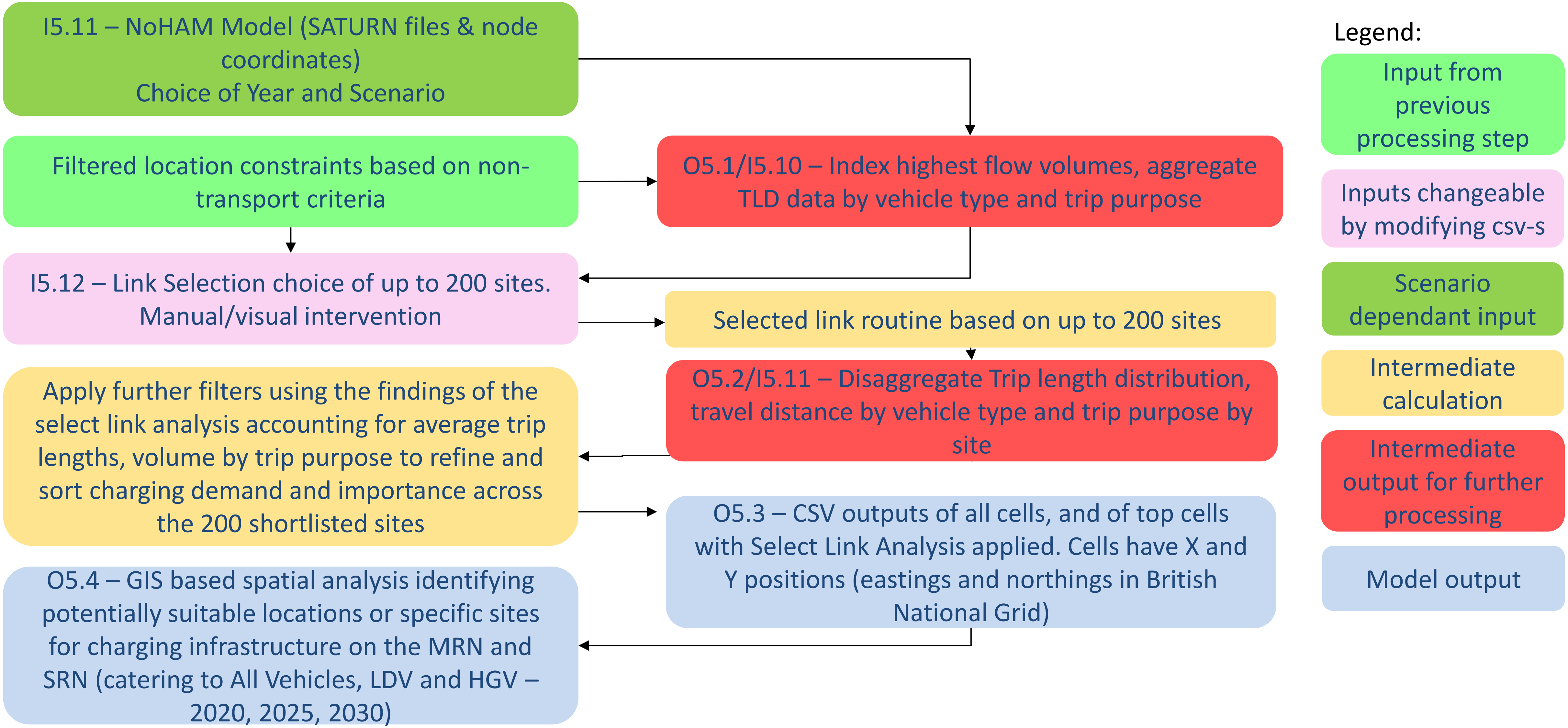
Note: Each scenario and year treated separately through the same processing chain



Core Module Step 5 - Determine possible sites for charge points along the major road network - Summary flowchart (1/2)



Core Module Step 5 - Determine possible sites for charge points along the major road network - Summary flowchart (2/2)

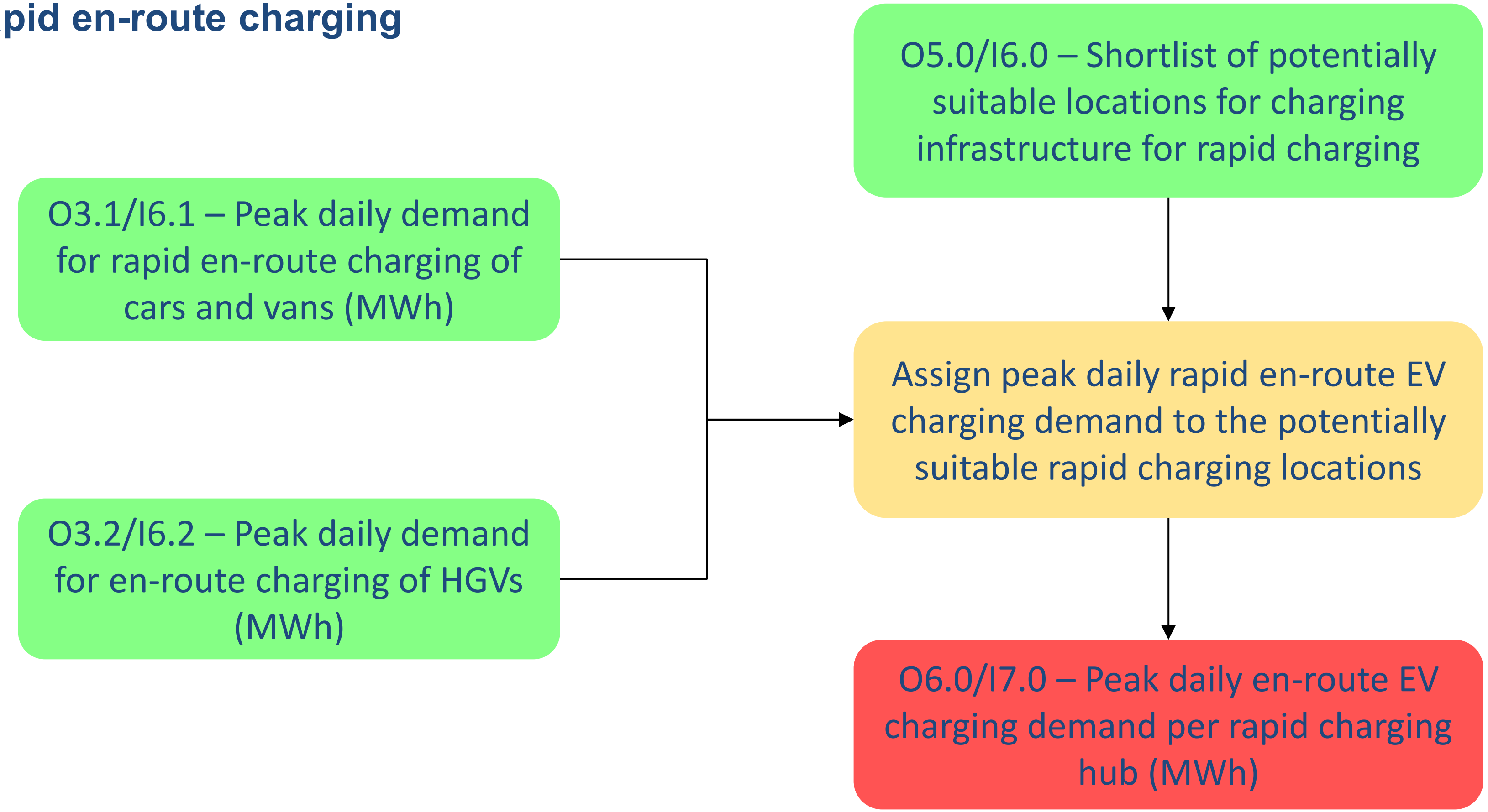


Contents

DNO Module Step 1r (Rapid en-route) – Map the charging demand to rapid hubs

Note: Each scenario and year treated separately through the same processing chain

Rapid en-route charging



Legend:

- Input from previous processing step
- Inputs changeable by modifying csv-s
- Scenario dependant input
- Intermediate calculation
- Intermediate output for further processing
- Model output

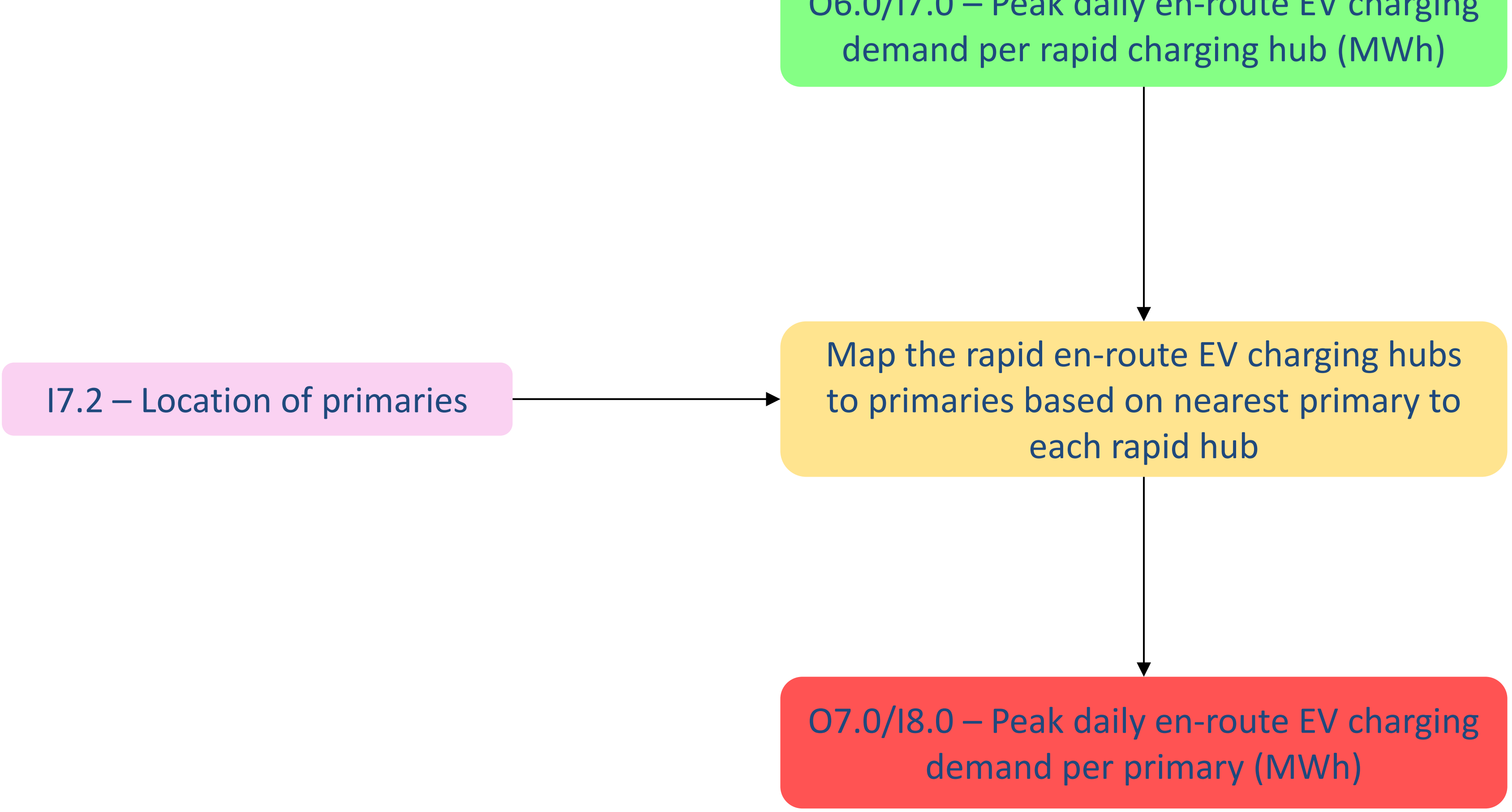
Note: Depending on run times, the shortlist of potential suitable site location might be used as a static input, as we do not expect the site locations to change once they are established. (i.e.. Core Module Step 5 can be skipped in the processing chain if it has been run already.)

Note: EV charging demand assigned to rapid charging sites is a broad estimate, and not meant to represent commercial viability of the sites, therefore we would not recommend using this table as a model output

DNO Module Step 2r (Rapid en-route) – Map the charging demand to primaries

Note: Each scenario and year treated separately through the same processing chain

Rapid en-route charging



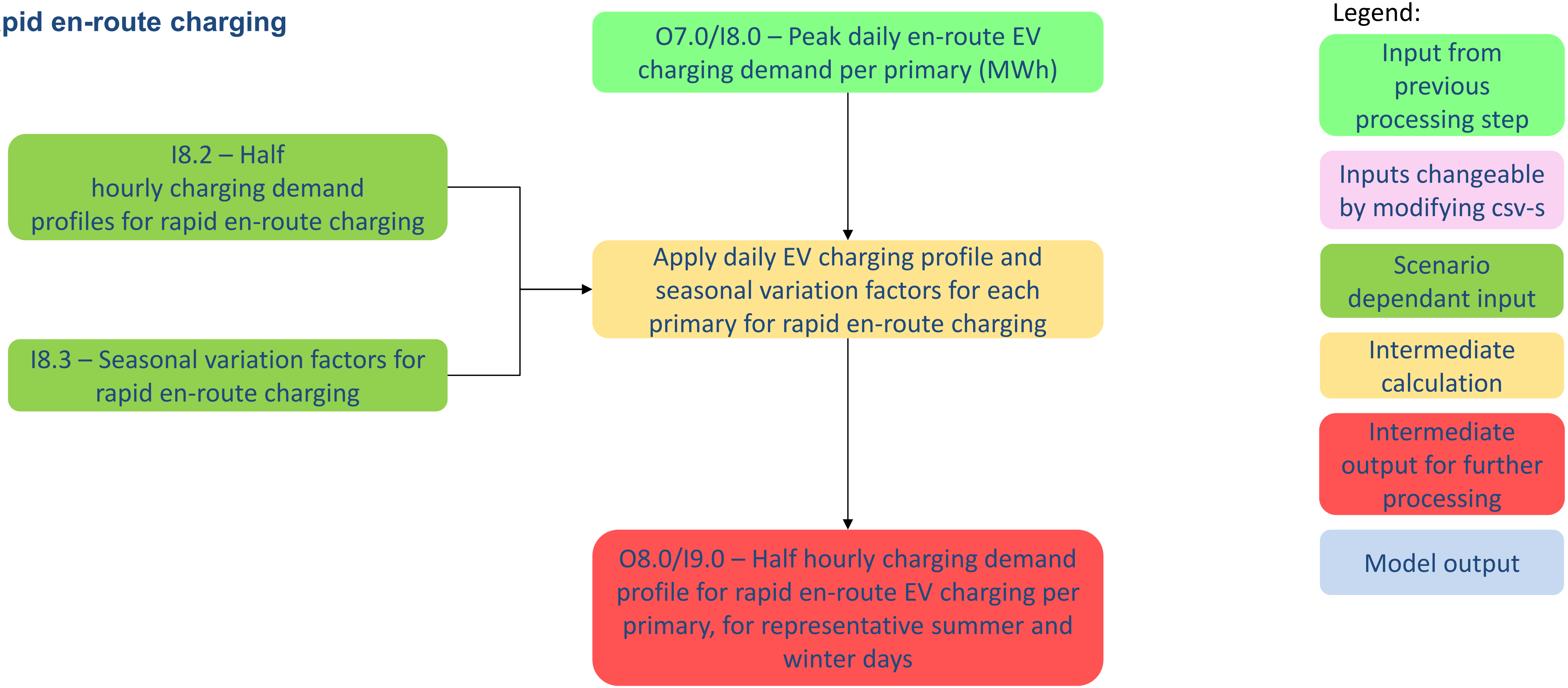
Legend:

- Input from previous processing step
- Inputs changeable by modifying csv-s
- Scenario dependant input
- Intermediate calculation
- Intermediate output for further processing
- Model output

DNO Module Step 3r (Rapid en-route) – Apply demand profile and seasonal variation factors

Note: Each scenario and year treated separately through the same processing chain

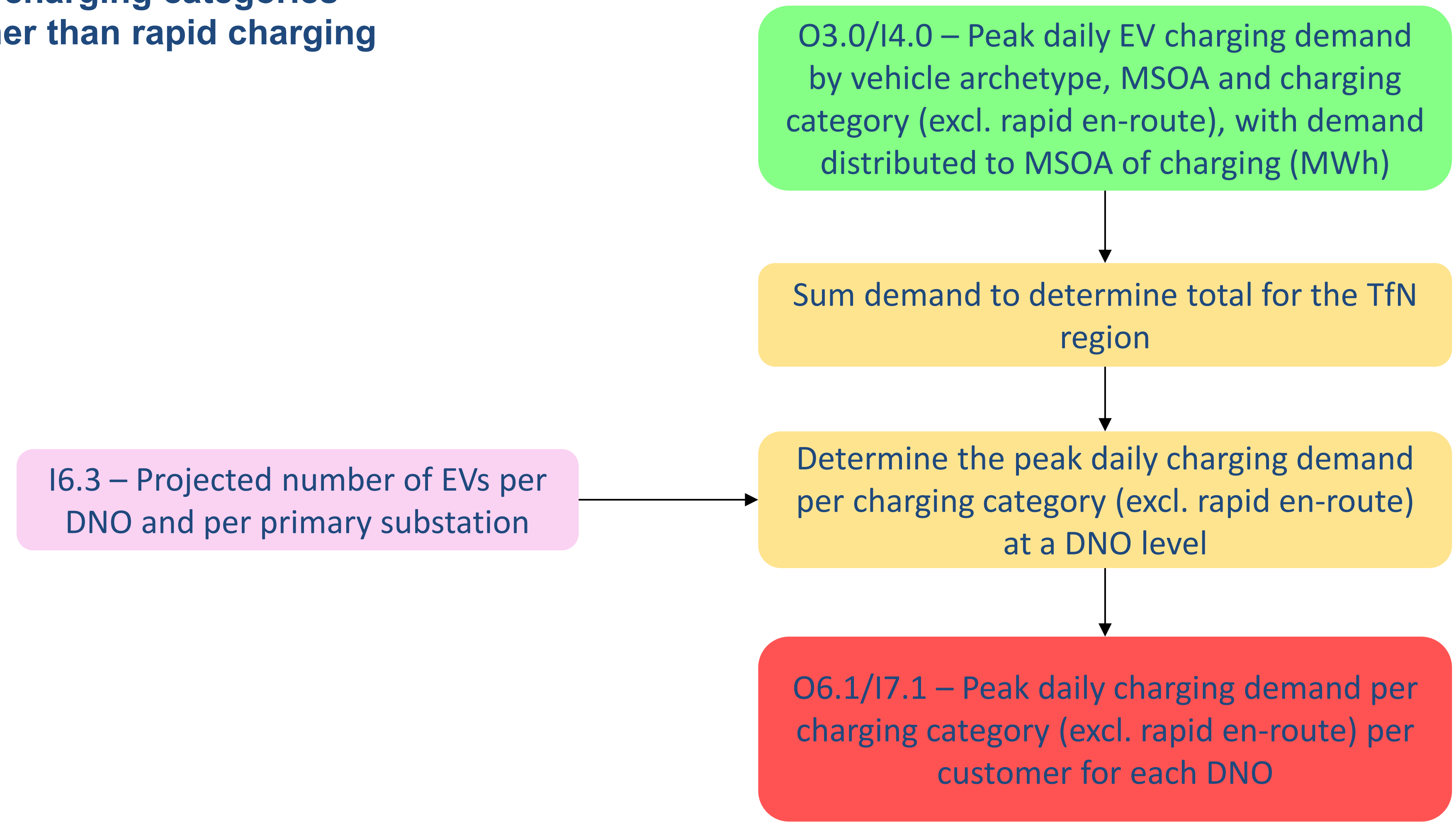
Rapid en-route charging



DNO Module Step 1a (All excl. rapid en-route) – Map the charging demand to DNOs

Note: Each scenario and year treated separately through the same processing chain

All charging categories other than rapid charging



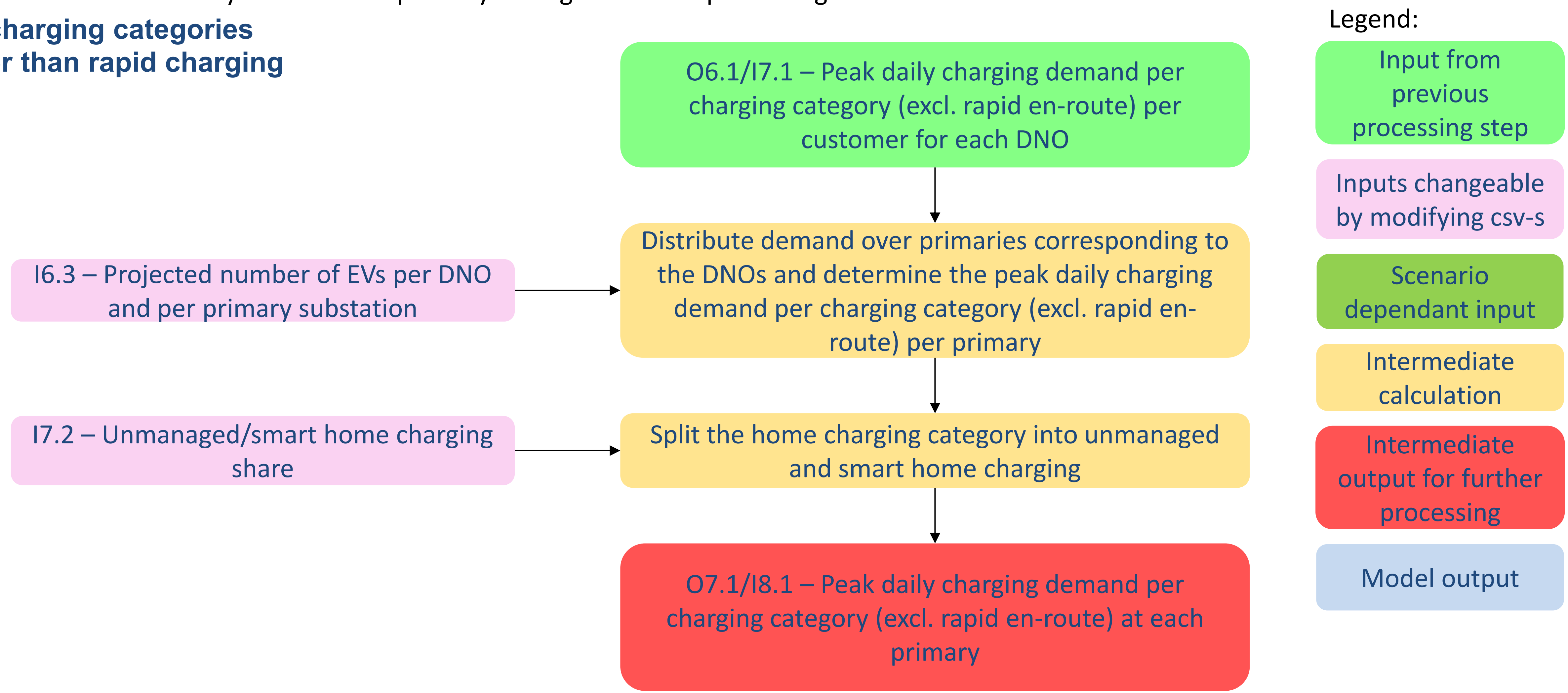
Legend:

- Input from previous processing step
- Inputs changeable by modifying csv-s
- Scenario dependant input
- Intermediate calculation
- Intermediate output for further processing
- Model output

DNO Module Step 2a (All excl. rapid en-route) – Map the charging demand to primaries

Note: Each scenario and year treated separately through the same processing chain

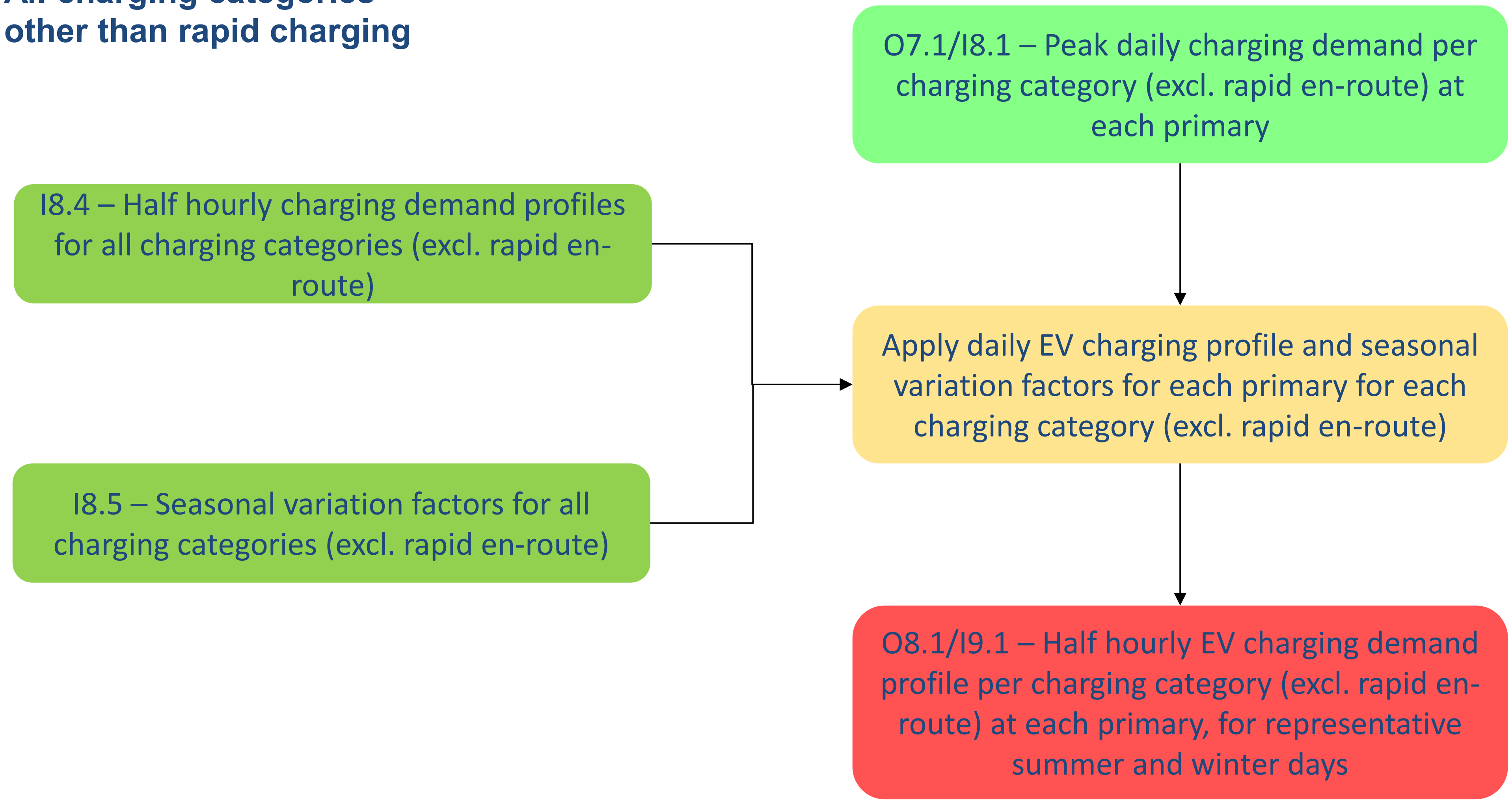
All charging categories other than rapid charging



DNO Module Step 3a (All excl. rapid en-route) – Apply demand profile and seasonal variation factors

Note: Each scenario and year treated separately through the same processing chain

All charging categories other than rapid charging



Legend:

- Input from previous processing step
- Inputs changeable by modifying csv-s
- Scenario dependant input
- Intermediate calculation
- Intermediate output for further processing
- Model output

DNO Module Step 3, Step 4 – Linkage between different inputs and processing steps

Rapid en-route charging

O8.0/I9.0 – Half hourly charging demand profile for rapid en-route EV charging per primary, for representative summer and winter days

All charging categories other than rapid charging

O8.1/I9.1 – Half hourly EV charging demand profile per charging category (excl. rapid en-route) per primary, for representative summer and winter days

Primaries

Sum half hourly EV charging demand profiles for all charging categories per primary

Secondaries

Sum half hourly EV charging demand profiles over all charging categories (excl. rapid en-route) and all primaries corresponding to the DNO

Legend:

- Input from previous processing step
- Inputs changeable by modifying csv-s
- Scenario dependant input
- Intermediate calculation
- Intermediate output for further processing
- Model output

DNO Module Step 4p (Primaries) – Sum EV charging demand profiles

Rapid en-route charging

O8.0/I9.0 – Half hourly charging demand profile for rapid en-route EV charging per primary, for representative summer and winter days

All charging categories other than rapid charging

O8.1/I9.1 – Half hourly EV charging demand profile per charging category (excl. rapid en-route) per primary, for representative summer and winter days

Primaries

Sum half hourly EV charging demand profiles for all charging categories per primary

O9.0/I10.0 – Total half hourly EV charging profile per primary, for representative summer and winter days

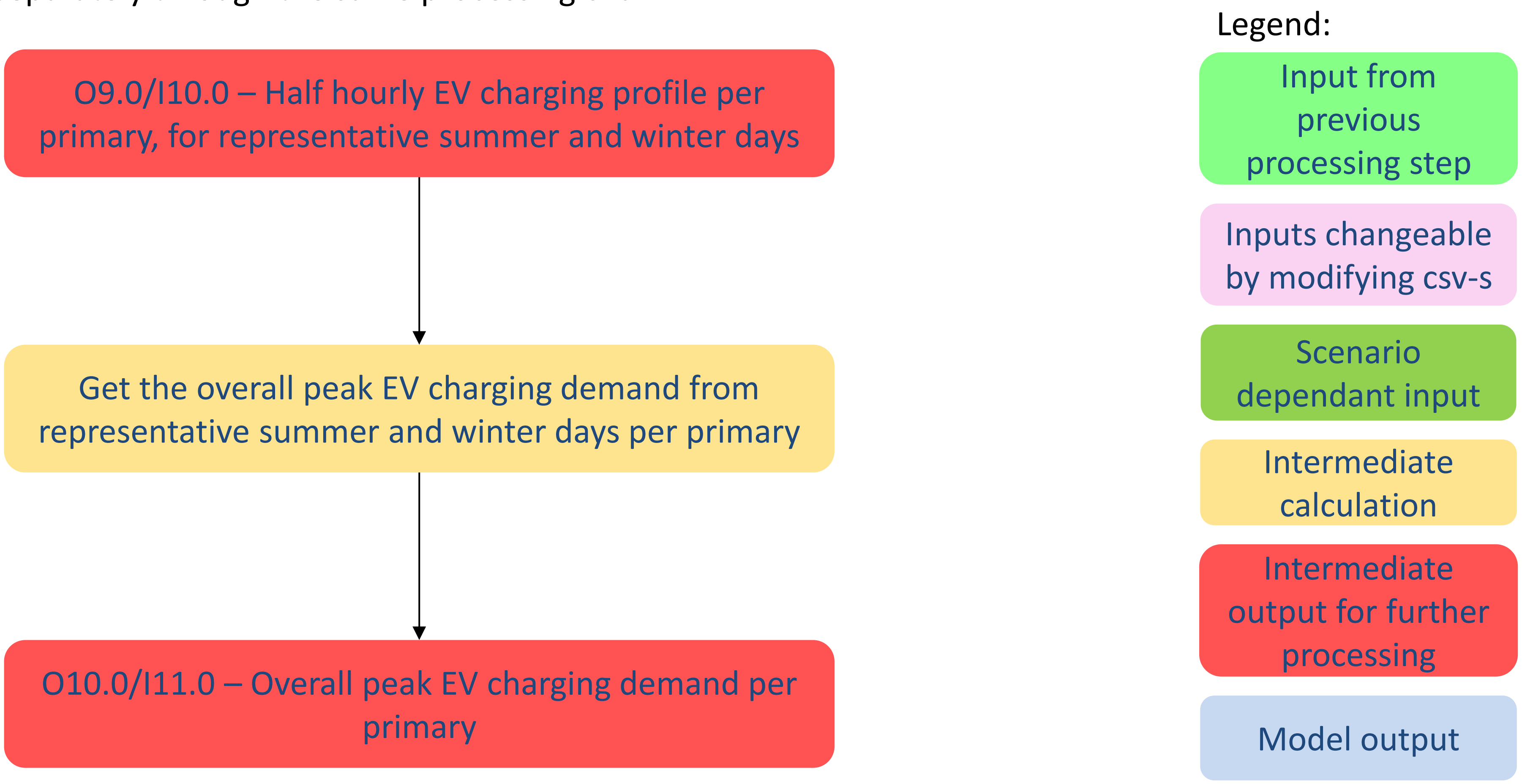
Legend:

- Input from previous processing step
- Inputs changeable by modifying csv-s
- Scenario dependant input
- Intermediate calculation
- Intermediate output for further processing
- Model output

DNO Module Step 5p (Primaries) – Find the overall peak demand per primary

Note: Each scenario and year treated separately through the same processing chain

Primaries

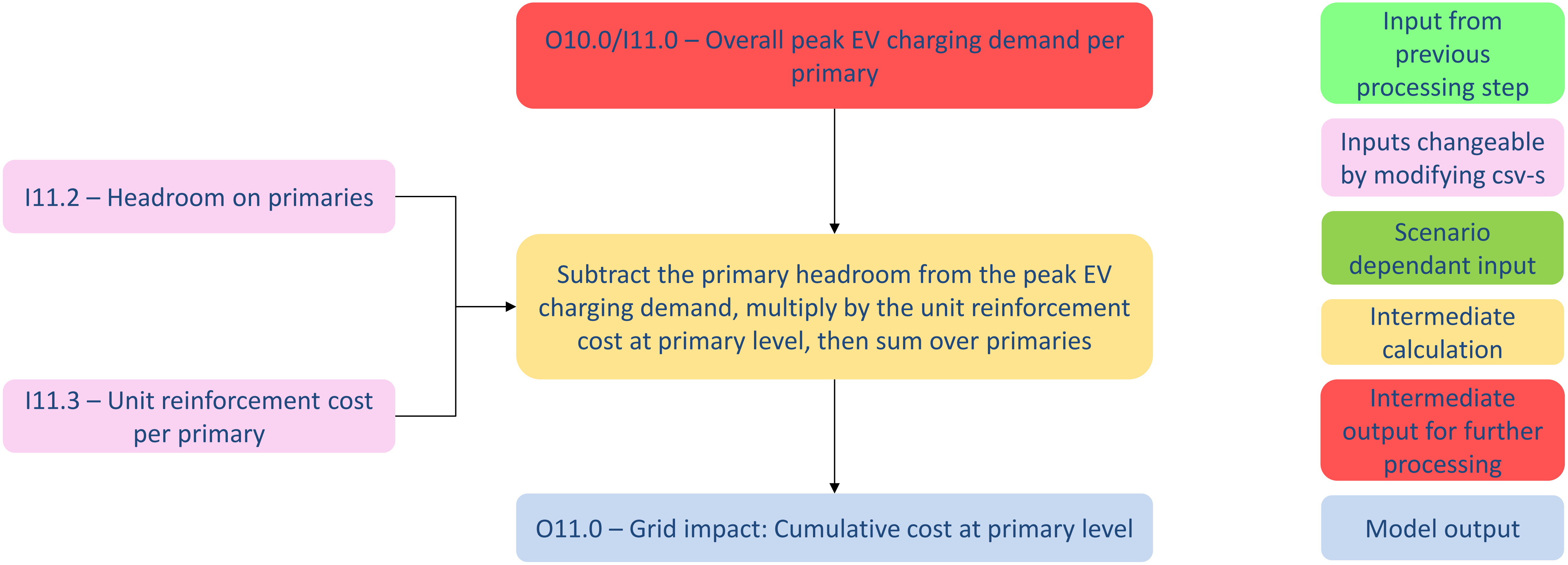


DNO Module Step 6p (Primaries) – Apply grid impact parameters

Note: Each scenario and year treated separately through the same processing chain

Primaries

Legend:



Note: DNOs do not have long term projections for headroom values so values will be kept constant

DNO Module Step 4s (Secondaries) – Sum EV charging demand profiles

All charging categories other than rapid charging

O8.1/I9.1 – Half hourly EV charging demand profile per charging category (excl. rapid en-route) per primary, for representative summer and winter days

↓

Secondaries

Sum half hourly EV charging demand profiles over all charging categories (excl. rapid en-route) and all primaries (within the TfN region) corresponding to the DNO

↓

O9.1/I10.1 – Total half hourly EV charging demand profile (excl. rapid en-route demand) per DNO, for representative summer and winter days

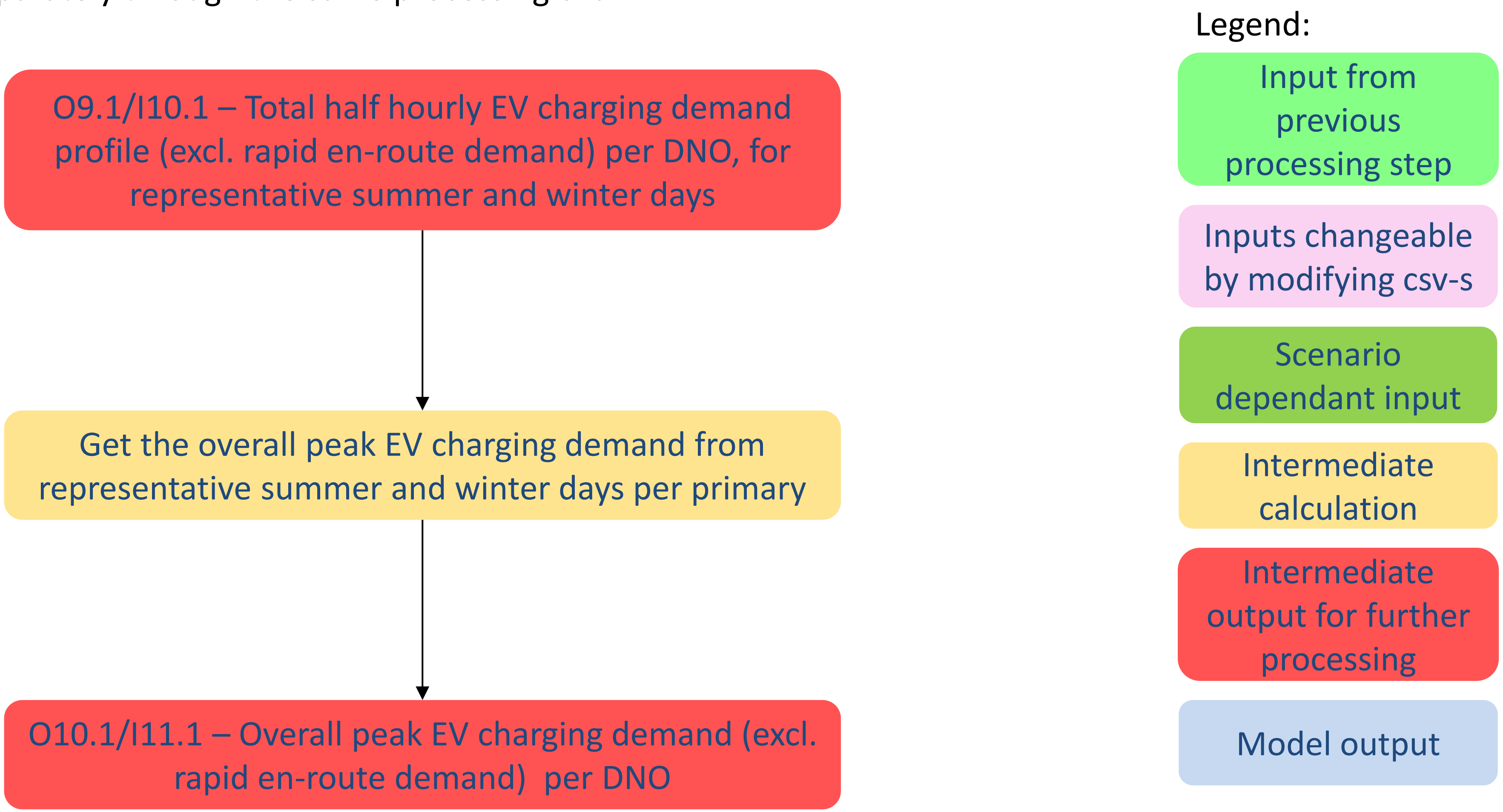
Legend:

- Input from previous processing step
- Inputs changeable by modifying csv-s
- Scenario dependant input
- Intermediate calculation
- Intermediate output for further processing
- Model output

DNO Module Step 5s (Secondaries) – Find the overall peak demand per DNO

Note: Each scenario and year treated separately through the same processing chain

Secondaries

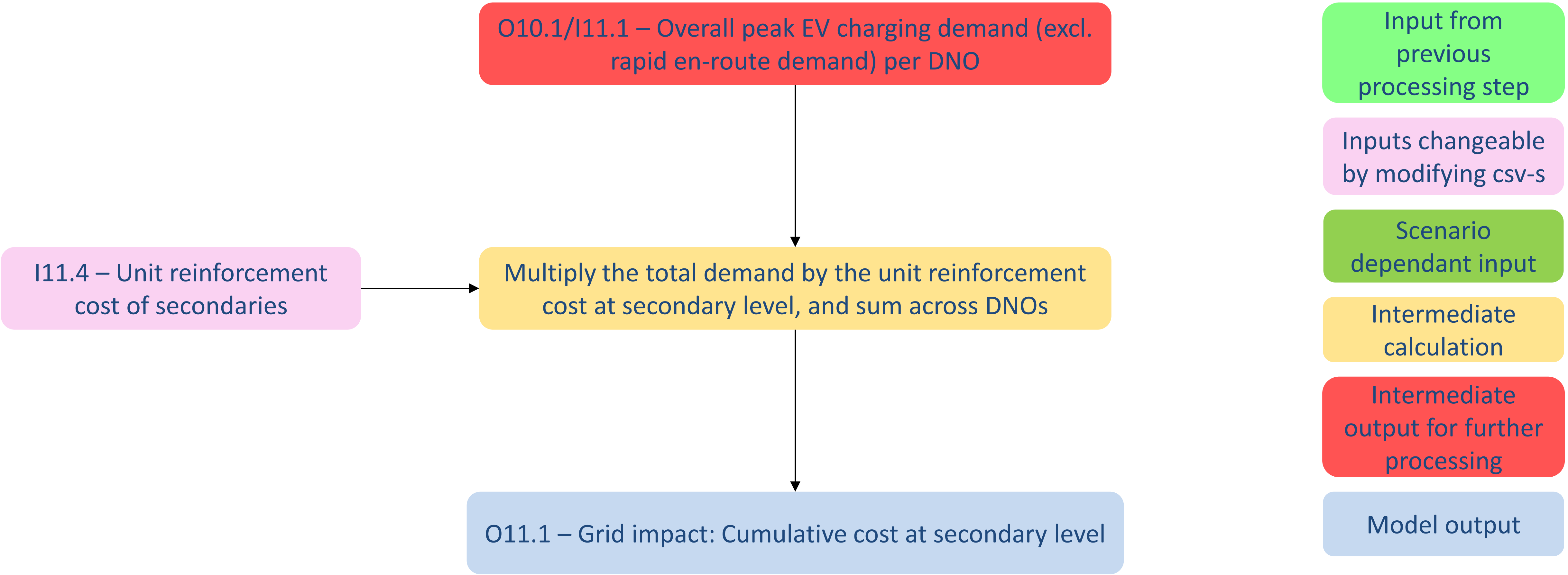


DNO Module Step 6s (Secondaries) – Apply grid impact parameters

Note: Each scenario and year treated separately through the same processing chain

Secondaries

Legend:



Contents

En-route rapid shortlisting for the Strategic Road Network (SRN) and TfN defined Major Road Network (MRN)

What question is the task trying to answer: Which potential rapid charging sites along the SRN and TfN MRN are most likely to be needed to create a complete network.

TfN Northern Highways Assignment Model Data
NoHAM OD matrix data being used to understand trip origin destination and pathway. This will be used to understand the proportion of vehicles within the traffic flow which are completing long distance journeys (journeys greater than 130km for cars, 180km for vans and 280km for HGVs) and may need en-route charging

EE approach to en-route charging size
EVCI model identifies the public rapid charging demand. Analysis to size the demand from existing sites (following similar inputs as used for the RCF) can be compared to the EVCI output to identify the public charging gap

Mapping / sizing en-route charging need

Rapid charging module Step 1 – Identifying rapid charging demand distribution based on trip patterns across the TfN region

I20.0 – NoHam OD matrix for TfN Just About Managing future travel scenario in 2033 broken down by car, van and HGV

↓

Traffic flows and journey length: Calculate the path (node series) taken by each vehicle from origin to destination. Calculate the distance travelled by each vehicle from the origin to each node along the route

↓

I20.1 – Distribution of battery size and SOC when choosing to charge which when combined provides a probability curve of how likely a driver is to stop to charge at different distances along their journey →

Charging probability: Once a vehicle has passed the minimum distance, assess the probability of the vehicle stopping to charge and the charging demand needed to reach the destination. Multiply the probability by charging demand to get the modelled demand at each point along the network

↓

Transfer the charging demand from the NoHam road links to TfN definition of the line segments which make up the SRN + MRN

↓

Proportion of EV: Calculate demand for each 5 year interval based on the DfT NRTP 22 Vehicle-led Decarbonisation Scenario for BEV uptake and traffic growth

→ O20.0 – Charging demand (kWh/year) and number of charge points for each road segment of the MRN, as defined by TfN, for 5 year intervals from 2025 to 2050, shown in the visualiser

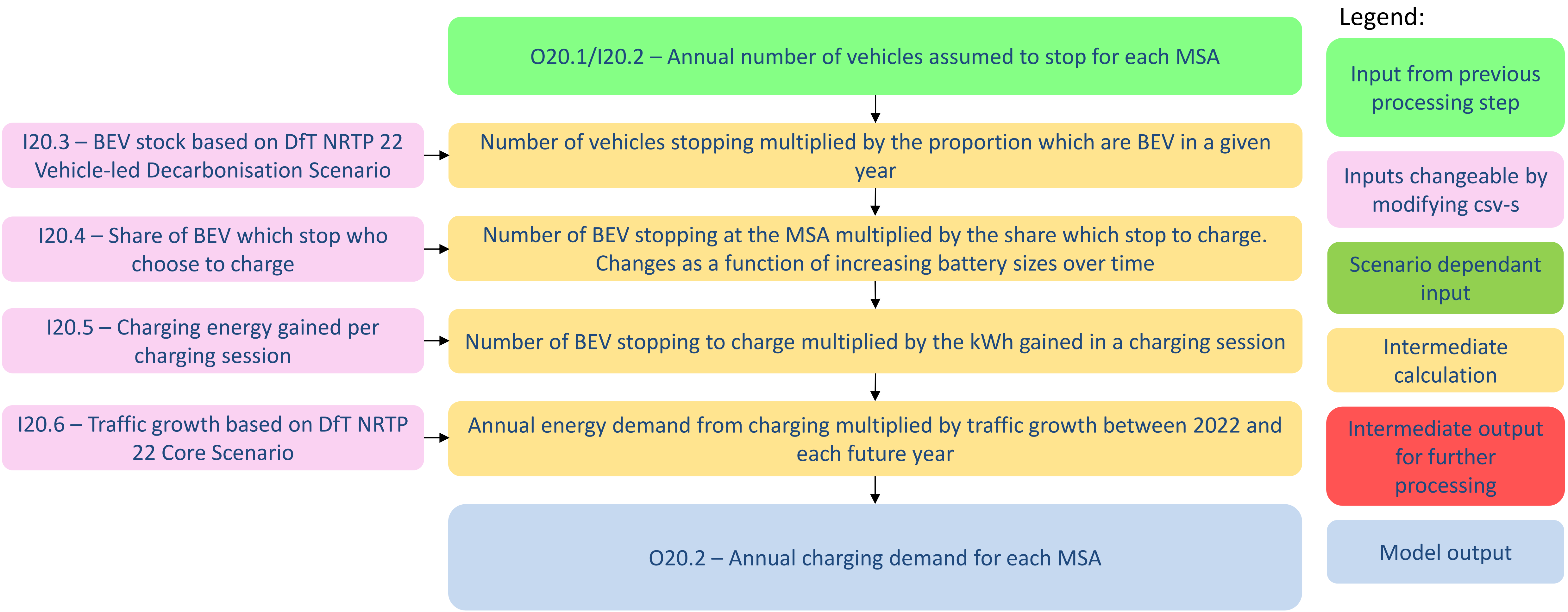
↓

Motorway Service Area demand: Calculate the number of vehicles assumed to stop on road segments within a 10km radius of each MSA

→ O20.1/I20.2 – Annual number of vehicles assumed to stop for each MSA

SOC = battery state of charge. CAS = Common analytical scenarios. MSA = Motorway Service Area

Rapid charging module Step 2 – Assess demand from the existing MSA network in order to calculate remaining whole network requirement



NRPT 22 = National Road Traffic Projections 2022. MSA = Motorway Service Area

Contents

Core Module (Step 1-4) data sources

Input data	Confidence in inputs over model time period	Recommended update frequency	Source
I1.0 – NoCarb EV vkm and stock population by MSOA	Long term (2050)	When TfN models updated	TfN NoCarb model
I1.1 – NorMITs housing type and NS Sec	Mid term (2040)	When TfN models updated	TfN NorMITs model
I1.2 – Trip purpose share (incl. commuting)	Mid term (2040)	When TfN models updated	TfN NorMITs model
I1.3 – Ownership share	Mid term (2040)	When TfN models updated	TfN NorMITs model
I1.4 – Electricity consumption (kWh / km)	Long term (2050)	Every 5 years	EE Electricity Consumption modelling
I2.1 – Charging behaviour assumptions for cars and vans	Short term (2030)	Annually	EV charging trials and EE database
I2.2 – Charging behaviour assumptions for HGVs	Short term (2030)	Annually	EV charging trials and EE database
I3.1 – Work charging origin-destination matrix	Mid term (2040)	When TfN models updated	TfN's NorMITs demand model
I3.2 – Destination charging origin-destination matrix	Mid term (2040)	When TfN models updated	TfN's NorMITs demand model
I3.3 – HGV depot charging origin-destination matrix	Mid term (2040)	When TfN models updated	TfN's NorMITs demand model
I3.4 – Seasonal variation factors	Short term (2030)	When TfN models updated	TfN visitor economy modelling
I4.1 – Power and utilisation assumptions for each charging category	Mid term (2040)	Every 5 years	ICCT method with EE enhancements, ZapMap utilisation data.
I4.2 – Normalized daily profile	Short term (2030)	Review new EV charging data available annually	Various – from EE work on EV charging load forecasting for DNOs

The data provided by TfN may include data derived from: Department for Transport. (2022). *National Travel Survey, 2002-2021: Special Licence Access*. [data collection]. *11th Edition.* UK Data Service. SN: 7553, DOI: 10.5255/UKDA-SN-7553-11

Core Module (Step 5) data sources

Input data	Confidence in inputs over model time period	Recommended update frequency	Source
I5.0 – Land Use Data	Mid term (2040)	Annually	AddressBase Plus
I5.1 – Land Use Weights for each vehicle type	N/A	N/A	Set by WSP as part of analysis
I5.2 – Weights for each dataset	N/A	N/A	Set by WSP as part of analysis
I5.3 – Observed Traffic Flow	Short term (2030)	Annually	DfT AADT Traffic Counts, 2022
I5.4 – Distance from MRN/SRN Road Network	N/A	N/A	Set by WSP as part of analysis
I5.5 – Sites of 4+ existing DC Rapid Hubs	Short term (2030)	Annually	National Charge Point Registry, Open Charge Map
I5.6 – Distance from Motorway Junctions	N/A	N/A	Determined by TfN
I5.7 – Other planning constraints	Long term (2050)	Annually	Flood risk (DEFRA)
I5.8 – Forecast Traffic Flow	Mid term (2040)	When TfN models updated	TfN NoHAM Highway Reassignment Analysis
I5.9 – Forecast Trip Length	Mid term (2040)	When TfN models updated	TfN NoHAM model Highway Reassignment Analysis
I5.11 – NoHAM model	Mid term (2040)	When TfN models updated	TfN NoHAM model
I5.12 – Link selection	N/A	N/A	Determined by TfN

The data provided by TfN may include data derived from: Department for Transport. (2022). *National Travel Survey, 2002-2021: Special Licence Access*. [data collection]. *11th Edition.* UK Data Service. SN: 7553, DOI: 10.5255/UKDA-SN-7553-11

DNO Module data sources

Input data	Confidence in inputs over model time period	Recommended update frequency	Source
I6.3 - Projected number of EVs per DNO and per primary substation	Short term (2050)	Annually when new DFES released	DNO Distribution Future Energy Scenarios (DFES)
I7.4 - Unmanaged/smart home charging share	Short term (2030)	Review available data annually	EE assumptions
I8.2, I8.4 - Half hourly charging demand profiles	Short term (2030)	Review available data annually	EV charging trials and EE database
I8.3, I8.5 - Seasonal variation factors	Short term (2030)	When TfN models updated	TfN visitor economy data
I11.2 - Headroom on primaries	Short term (2030)	Annually	DNOs, heatmaps and LTDS
I11.3 - Unit reinforcement cost per primary	Short term (2030)	Review available data annually	DNOs, ED2 Business plan
I11.4 - Unit reinforcement cost of secondaries	Short term (2030)	Review available data annually	DNOs, ED2 Business plan

The data provided by TfN may include data derived from: Department for Transport. (2022). *National Travel Survey, 2002-2021: Special Licence Access*. [data collection]. *11th Edition.* UK Data Service. SN: 7553, DOI: 10.5255/UKDA-SN-7553-11

Model outputs

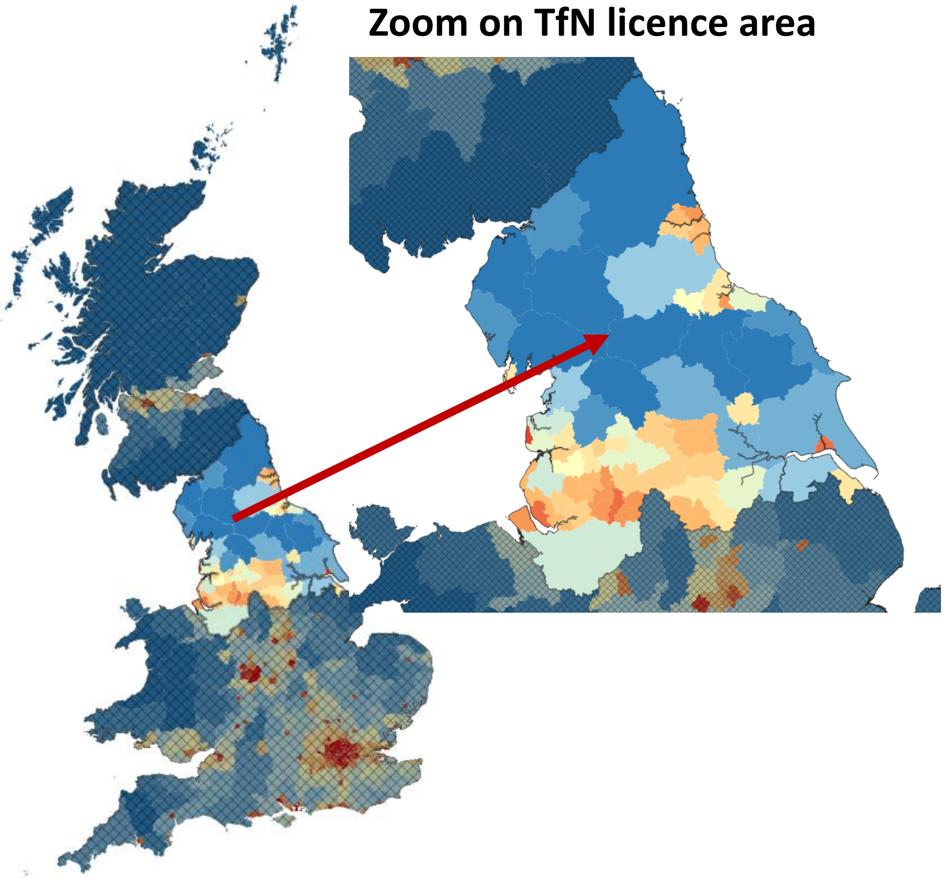
Output	Years of output	Confidence in outputs over model time period	Recommended update frequency for inputs	Description
O3.1/I6.1, O3.2/I6.2 – Peak day demand for rapid en-route charging	2020, 2025, …, 2050	Long term (2050)		Total peak day demand for rapid en-route charging of cars and vans (MWh) and total peak day demand for en-route charging of HGVs (MWh)
O4.0 – Number of EV charging points	2020, 2025, …, 2050	Mid term (2040)		Number of EV charging points required in each MSOA for on-street and destination charging
O5.3/O5.4 – CSV outputs and GIS based spatial analysis identifying potentially suitable locations or specific sites for charging infrastructure on the MRN and SRN	2025, 2030	Short term (2030)	Annually	CSV outputs and GIS based spatial output identifying potentially suitable locations or specific sites for charging infrastructure on the MRN and SRN (catering to BEV Cars, Vans and HGV - 2025, 2030)
O11.0, O11.1 – Grid impact	2020, 2025, …, 2050	Short term (2030)	Annually	Estimated cumulative cost of necessary network reinforcement to meet the EV charging peak demand at primary and secondary levels

- In addition to the above outputs, we will generate a high-level output file summarising key results for particular years of importance
- We will take views from the steering group on what a practical summary file would contain for their purposes (could be only short term results, aggregated at Local Authority level, for example)

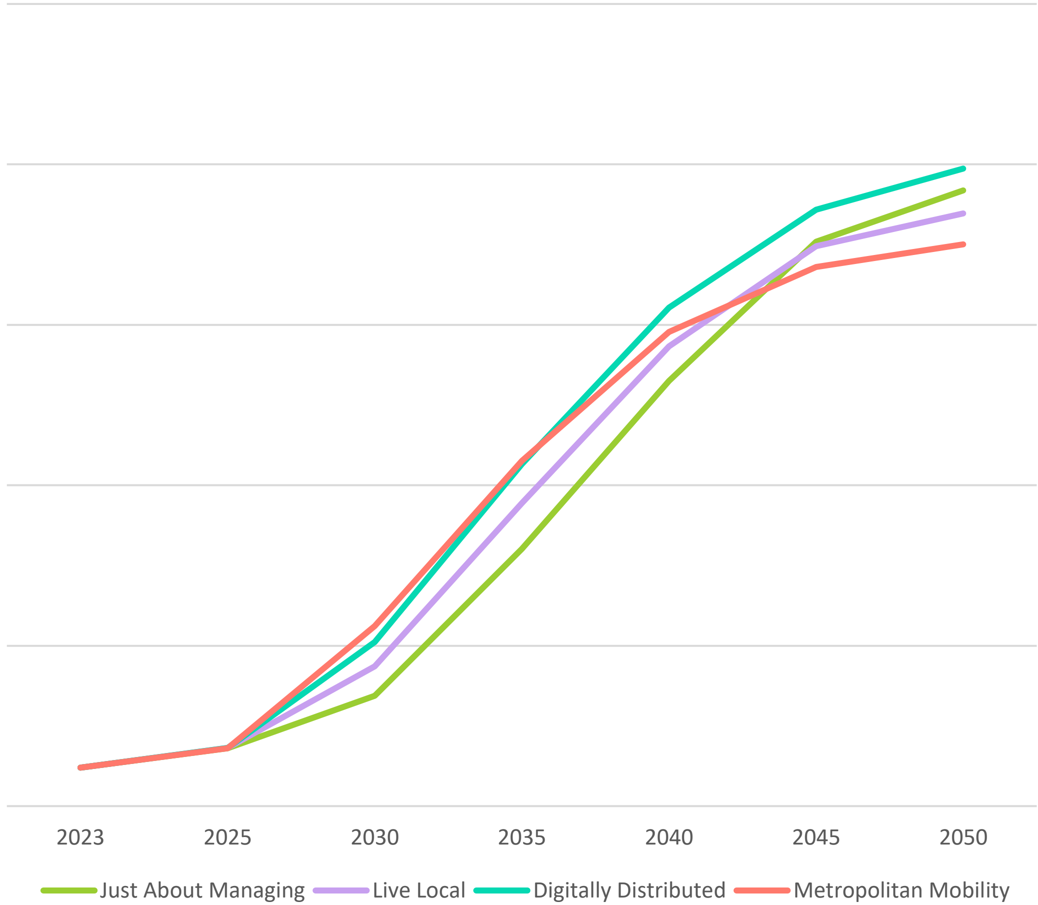
The data provided by TfN may include data derived from: Department for Transport. (2022). *National Travel Survey, 2002-2021: Special Licence Access*. [data collection]. *11th Edition.* UK Data Service. SN: 7553, DOI: 10.5255/UKDA-SN-7553-11

Example visualisations of results

Example heatmap of EV charging demand across GB



Example graph of EV charger needs in TfN licence area



Contents

Charging behaviour assumptions have been based on those used in ICCT charging infrastructure reports, with some adaption (shown on the next slide)

Cars and Vans – ICCT values[1]

Power train	Commuting Status	Home Charging Availability	Home Charging	Work Charging	Public Charging (slow / fast)	DC Charging (rapid)
BEV	Commuter	Yes	70%	20%	5%	5%
		No	0%	45%	30%	25%
	Non Commuter	Yes	85%	0%	5%	10%
		No	0%	0%	40%	60%
PHEV	Commuter	Yes	70%	30%	5%	0%
		No	0%	65%	35%	0%
	Non Commuter	Yes	90%	0%	10%	0%
		No	0%	0%	100%	0%

- Typical charger power rates: home: 3-7 kW; on-street slow/fast: 7-22 kW; rapid en-route: 50-350 kW
- Exact assumptions around how charger power increases each year (from charge point power increases and higher charging rate acceptance from EVs) will be detailed in the statement of methodology

1: ICCT, 2020, Quantifying the electric vehicle charging infrastructure gap in the United Kingdom

Modelling Assumption – Charging Behaviour

Cars and Vans – proposed values for model baseline

Power train	Commuting Status	Home Charging Availability	Home Charging	On-street residential charging	Destination charging	Work Charging	En-route charging
BEV	Commuter	Yes	70%	0%	5%	20%	5%
		No	0%	35%	10%	45%	10%
	Non Commuter	Yes	85%	0%	5%	0%	10%
		No	0%	75%	15%	0%	10%
PHEV	Commuter	Yes	65%	0%	5%	30%	0%
		No	0%	30%	5%	65%	0%
	Non Commuter	Yes	90%	0%	10%	0%	0%
		No	0%	80%	20%	0%	0%

- As this will be a CSV file input into the model, the user can update the file as needed to test different futures of charging behaviour – for example if trend in working from home continues this could be tested with low work charging shares

Home and work charging % are in line with ICCT. Public charging split between on-street residential and destination. DC fast charging split between on-street residential and en-route

The effect of increasing the share of charging done at destinations was investigated through a sensitivity analysis

Charging behaviour assumptions – changes made in destination sensitivity analysis are in brackets

Powertrain	Commuting Status	Home Charging Availability	Home Charging	On-street residential charging	Destination charging	Work Charging	En-route charging
BEV	Commuter	Yes	70% (60%)	0%	5% (15%)	20%	5%
		No	0%	35% (30%)	10% (15%)	45%	10%
	Non Commuter	Yes	85% (70%)	0%	5% (20%)	0%	10%
		No	0%	75% (60%)	15% (30%)	0%	10%
PHEV	Commuter	Yes	65% (60%)	0%	5% (10%)	30%	0%
		No	0%	30% (25%)	5% (10%)	65%	0%
	Non Commuter	Yes	90% (75%)	0%	10% (25%)	0%	0%
		No	0%	80% (60%)	20% (40%)	0%	0%

- Values in red represent a decrease in charging demand share for home / on-street residential charging
- Values in green represent an increase in charging demand share for destination charging
- Note that despite the small absolute increase (5-10 percentage points for most archetypes) in destination charging demand, this is a large relative increase and leads to destination charging demand more than doublingin red represent a decrease in charging demand share for home / on-street residential charging

Modelling assumption – charging rates – for validation and discussion

Charging rates for each charging category (kW)

Charging category	2023	2025	2030	2035	2040	2045	2050
On-street residential	BEV: 8 kW, PHEV: 3.5 kW						
Destination	BEV: 8 kW, PHEV: 3.5 kW						
Workplace	BEV: 8 kW, PHEV: 3.5 kW						
Rapid en-route	44 kW	50 kW	65 kW	75 kW	100 kW	125 kW	150 kW

- Charging rates for slow/fast categories are taken from ICCT.
- Charging rates for rapid charging are taken from ICCT up to 2035. From 2040 onwards they have been assumed by EE.
- Note these charging rates represent the power being transferred to the vehicle, which is not always equal to the power of the charge point being used. Other factors, such as the maximum charging rate the vehicle can accept, influence the level of power that can be drawn from a charge point, and are taken into account in the above values.

Modelling assumption – utilisation – for validation and discussion

These slides have been replaced by those in EVCI Utilisation assumption updates from slide 82 onwards.

Utilisation for each charging category (hours / day)

Charging category	2025	2030	2035
On-street residential	4	5	6
Destination	3	3	6
Workplace	4.3 hours per weekday		
Rapid en-route	3.6	3.6	3.6

- Above values are taken from ZapMap utilisation data
- Future values are determined by transitioning current ZapMap data to match ICCT (shown below), which are dependent on level of EV uptake – we will use these equations in the EVCI model to calculate utilisation at each charging category

Public charging daily utilisation in hours	Average daily hours = 0.832 * LN (EV per million population) – 4.902
Fast charging daily utilisation in hours for metropolitan areas	Average daily hours = 0.650 * LN (BEV per million population) – 4.099
Fast charging daily utilisation in hours for nonmetropolitan areas	Average daily hours = 0.483 * LN (BEV per million population) – 3.021

Contents

Input-related risks

Limitation	Risk (and mitigation strategy where appropriate)	Relevant step in model	Importance
The highest resolution of input data provided is at MSOA level	The model will not be able to capture level variations, even if they are large (for example in densely populated urban areas)	All steps	Medium
Detailed mapping of all destinations very challenging	New destinations arise over time or preferred charging destinations change over time. TfN’s destination / trip purpose categories can be used to manage changing preferences and somewhat mitigate this risk	Core module, Step 3	Medium
Land Use data used to identify suitable rapid hub locations is based on present day uses	Land Use data is based on present uses and would not account for changing land use or the potential for greenfield sites. Can be mitigated by updating TfN housing inputs, based on Ordnance Survey data	Core module, Step 5	Medium
Seasonal factors used in the DNO module will be based on historic data, and are dependent on weather conditions.	Future changes in weather patterns (more extreme weather, larger temperature swings etc.) will not be incorporated into these parameters	DNO module, Step 3	Low
DNO module attributing charging demand to primary substations is based on customer numbers data from DNOs.	DNOs may be unable or unwilling to provide this piece of data (all other data types are available and/or have been received). If we are unable to acquire this data, we will make a minor change to the method to attribute charging demand based on primary locations rather than customer numbers	DNO module, all steps	Low

Processing-related risks (1/3)

Limitation	Risk (and mitigation strategy where appropriate)	Relevant step in model	Importance
The model provides projections rather than predictions.	Projections may differ from actual events and trends in the future. To mitigate this, multiple scenarios will be defined. It is also recommended to rerun the model whenever new data is available	All steps	High
Lack of differentiation between sites limiting scope to prioritise/rank	Risk that there is too little variation between sites using the filters applied to effectively filter down and identify the key most suitable sites. Will be mitigated by setting model parameters to ensure differentiation between sites	Core module, Step 5	High
The DNO module only determines EV charging demand peak rather than overall peak substation demand	The EV charging demand peak could be temporally misaligned with each substation's overall peak demand including other demand types. We are also not modelling the increase/decrease in demand over time from customer growth, energy efficiency, heat pumps, etc., nor are we conducting full power flow modelling. All of this is very resource intensive and outside of the scope of this project. Therefore, there is significant uncertainty in actual network impacts from EVs and hence the overall costs of the DNOs. Our high level analysis is sufficient to give an indication of likely network costs and how these vary between scenario, but should not be considered to give accurate calculations of network impacts for individual network assets	DNO module, all steps	Medium
Analysis of travel demands across different forecast horizons	Flows may rise or fall based on infrastructure and demand growth assumptions contained in the modelling. The top 200 sites for one year/scenario may not be the same sites for another year/scenario. This would potentially increase the number of sites and effort required for selected link analysis	Core module, Step 5	Medium

Processing-related risks (2/3)

Limitation	Risk (and mitigation strategy where appropriate)	Relevant step in model	Importance
Approach to identifying suitable sites will be indicative given the strategic level nature of the assessment	In practice there are many highly localised factors at play in influencing local charging demand and the suitability of a site. For example, the cost of the DNO connection has a significant bearing on the suitability of a site from a delivery perspective. Similarly, whilst potentially suitable host sites may be identified in proximity of the MRN, their accessibility and prominence to passing drivers will be variable	Core module, Step 5	Medium
Approach to filtering sites results in an uneven distribution of sites	A demand-led approach to filtering sites could result in an uneven distribution of sites, rather than the broader coverage of sites which was envisaged. To mitigate this a zone or weight based approach will be developed to ensure the potential sights are distributed across the region	Core module, Step 5	Medium
Defining a suitable site, and assumptions around charging infrastructure deployed	Risks associated with ensuring there is a clear definition of what is a 'suitable location or site', and to what extent this accounts for delivery, or demand only. Associated assumptions around the nature of the sites and charge point types (i.e. Rapid Charging hubs), where some may also be destinations in their own right. Will be mitigated by clearly defining what land use categories are considered from input data	Core module, step 5	Low

Processing-related risks (3/3)

Limitation	Risk (and mitigation strategy where appropriate)	Relevant step in model	Importance
Approach is likely to determine suitable areas or clusters of sites, as opposed to single optimal sites	It is likely that the site assessment process will identify suitable areas or clusters of sites, as opposed to singular or highly specific optimal sites. To mitigate this a zone or weight based approach will be developed to ensure the potential sights are distributed across the region	Core module, Step 5	Low
Strategic level representation of the local road network	Transport models primarily consider the core network, and whilst all trips are included within the model demand matrices, intrazonal trips are not assigned to network. Strategic and model zones are large so these represent the shorter distance demand "in the model" but not represented "on the network"	Core module, Step 5	Low
The vehicle archetypes the model uses are not exhaustive	Some variation lost in the data (e.g. from vehicles used for multiple purposes such as Uber, different car classes, etc.) and peaks for certain categories might be a slight under or over estimation. Will be mitigated by using as detailed archetyping as possible given available input data	All steps	Low
The charging categories defined might not be exhaustive as other charging technologies might emerge in the future.	Some charging points might become redundant if higher efficiency or higher power charging becomes available. To mitigate this, the model is made modular, with charging categories easily amendable if required	All steps	Low
Fixed cost flow simplification in transport modelling	Derivation of fixed cost flows will help to improve the usability of the model with respect to selected link interrogation, potentially expanding the analysis that can be conducted. It does however result in a simplification of routings and the resulting outputs may vary slightly from the original assignment	Core module, Step 5	Low

Summary of approach for determining reinforcement costs on primary and secondary substations

Primary substations (typically 10-50 MW)

- Both rapid and non-rapid peak daily charging demand are distributed to primary substations.
- Rapid charging demand is assigned from hubs identified in core module step 5 to the closest primary substation.
- Non-rapid charging demand is aggregated for the whole region, then distributed to individual primary substations based on the projected number of EVs on each.
- Hourly charging profiles are applied to daily demand to calculate additional load at hourly resolution.
- Peak hourly load is compared to headroom on each primary substation. If headroom is exceeded, additional load above headroom is included in reinforcement needs.
- A reinforcement cost of £400,000 / MW increase above firm capacity is assumed for all primary substations.

Secondary substations (typically 25-500 kW)

- Only non-rapid peak daily charging demand is assumed to occur on secondary substations, as the power requirements of most rapid hubs are too large to connect to secondary substations.
- Non-rapid charging demand is aggregated for the whole region, then distributed to each DNO based on the total number of projected EVs on each.
- Hourly charging profiles are applied to daily demand to calculate additional non-rapid load at hourly resolution for each DNO.
- Peak non-rapid hourly load is calculated for each DNO. As headroom estimates are not available for secondary substations, this load is assumed to entirely contribute to reinforcement needs.
- A reinforcement cost of £50,000 / MW increase in peak load is assumed for all secondary substations.

Notes:

- Assessment of reinforcement costs includes **all charging demand** modelled in the EVCI model. This includes public slow/fast charging (public residential and destination charging, presented in core module results), as well as home, workplace, HGV depot, and rapid en-route charging.
- This work does not assess the impact of increased electricity demand from other low carbon technologies, such as heat pumps.
- Reinforcement costs are based on publicly available data from the three DNOs' Statement of methodology and connection charges, as well as other sources including their draft business plans. The cost of a connection can vary significantly depending on the specific circumstances - the data we have taken gives an indication of typical expected costs.

Contents

Contents

Accepted values of Categorical Variables

Categorical Variable	Accepted values
Vehicle type	Car, Van, HGV
Power train	BEV, PHEV
Commuting/non-commuting (Trip purpose)	Commuting, Non-commuting
Ownership	Private, Company, Shared, Big haulier, Small local HGV operator
Driver income	Low, High
Rural/urban	Rural, Urban
Charging categories for cars and vans	Home, On-street residential, Work, Destination, Rapid en-route
Charging categories for HGVs	HGV depot, HGV en-route
Home charging	Unmanaged, Smart charging

Vehicle archetype parameters: Vehicle type, Power train, Commuting/non-commuting, Ownership, Driver income, Rural/urban

Note: While these are the default accepted values for the categorical variables, these can be modified by updating model constants.

Note: The variables in blue are not strictly necessary to calculate the EVCP requirements. Whether or not these are kept will depend on processing times and data availability. To be discussed and decided by TfN during model development.

Core module step 1 to 4 - Calculate the number of public charge points required in each MSOA

Core Module Step 1 – Forecast EV charging demand from vehicles registered in each MSOA, Provisional column structure of inputs and interim outputs

Input, Interim output, Model output	Columns
I1.0 – NoCarb EV vkm and stock population by MSOA	Scenario, Year, MSOA, Vehicle type, Power train, Vehicle stock, Chainage
I1.1 – NorMITs housing type and NS Sec	Scenario, Year, MSOA, Area type (rural/urban classification), Property type (to estimate Parking status), NS-Sec index (to estimate Driver income), Number of cars, Number of URPN-s
I1.2 – Trip purpose share (incl. commuting)	Variables to merge on, Trip purpose (incl. Commuting status), Share
I1.3 – Ownership share	Variables to merge on, Ownership, Share
I1.4 – Electricity consumption (kWh / km)	Vehicle type, Power train, Electricity consumption
O1.0/I2.0 – Annual EV charging demand by vehicle archetype at the MSOA of registration	Scenario, Year, MSOA, Vehicle type, Power train, Parking status, Trip purpose (incl. Commuting status), Annual demand, Rural/Urban, Driver income, Ownership

Note: The input data columns are only indications of the target columns necessary for the model run. We recognize that the data might be provided to us in multiple data sets, each containing a few target variables that need to be aggregated to arrive at the target input. However, we expect the pre-processing steps that are needed to be straight forward and not to add a large overhead to the development. (e.g. Certain inputs will be provided on a NoHAM zone basis, with a NoHAM to MSOA mapping included and the mapping done as a pre-processing step).

Note: The column names might differ in the model inputs and outputs based on the data set names or better representative names. These names were selected to reflect what the columns would contain. The possibly modified names should be self-explanatory.

Note: The variables in blue are not strictly necessary to calculate the EVCP requirements. Whether or not these are kept will depend on processing times and data availability. To be discussed and decided by TfN during model development.

Core Module Step 2 – Split charging demand by charging category, Provisional column structure of inputs and interim outputs

Input, Interim output, Model output	Columns
I2.1 – Charging behaviour assumptions for cars and vans.	Vehicle type, Power train, Parking status, Commuting status, Charging category, Share of demand
I2.2 – Charging behaviour assumptions for HGVs.	Vehicle type, Power train, Parking status, Commuting status, Charging category, Share of demand
O2.0/I3.0 – Annual EV charging demand by vehicle archetype and charging category at the MSOA of registration	Scenario, Year, MSOA, Vehicle type, Power train, Parking status, Trip purpose (incl. Commuting status), Charging category, Annual demand, Rural/Urban, Driver income, Ownership

Note: The input data columns are only indications of the target columns necessary for the model run. We recognize that the data might be provided to us in multiple data sets, each containing a few target variables that need to be aggregated to arrive at the target input. However, we expect the pre-processing steps that are needed to be straight forward and not to add a large overhead to the development. (e.g. Certain inputs will be provided on a NoHAM zone basis, with a NoHAM to MSOA mapping included and the mapping done as a pre-processing step).

Note: The column names might differ in the model inputs and outputs based on the data set names or better representative names. These names were selected to reflect what the columns would contain. The possibly modified names should be self-explanatory.

Note: The variables in blue are not strictly necessary to calculate the EVCP requirements. Whether or not these are kept will depend on processing times and data availability. To be discussed and decided by TfN during model development.

Core Module Step 3 – Description of how the demand is distributed for different charging categories

Vehicle type	Charging category	Distribution mechanism
Cars, Vans	Home / on-street residential	Assumed to occur in the MSOA where the vehicle is registered.
	Work	Distributed based on the origin-destination matrix of commuting trips from TfN's NorMITs demand model.
	Destination	Distributed based on the origin-destination matrix of relevant trip types from TfN's NorMITs demand model. This will likely include shopping and leisure trips, but relevant trip types will be agreed with TfN during the development based on data availability.
	Rapid en-route	Summed for the whole MRN and distributed to specific sites in Step 5.
HGV	Depot	Distributed using EE's GB database of depot locations and fleet sizes.
	Rapid en-route	Summed for the whole MRN and distributed to specific sites in Step 5.

Core Module Step 3 – Geographically distribute charging demand for each charging category, Provisional column structure of inputs, interim outputs and model outputs

Input, Interim output, Model output	Columns
I3.1 – Work charging origin-destination matrix	Scenario, Year, Vehicle type (Car, Van), Charging category (Work), MSOA of origin, MSOA of destination, Trip frequency
I3.2 – Destination charging origin-destination matrix	Scenario, Year, Vehicle type (Car, Van), Charging category (Destination), MSOA of origin, MSOA of destination, Trip frequency
I3.3 – HGV depot charging origin-destination matrix	Scenario, Year, Vehicle type (HGV), Charging category (HGV depot), MSOA of origin, MSOA of destination, Trip frequency
O3.0/I4.0– Annual EV charging demand by vehicle archetype and charging category at the MSOA of charging	Scenario, Year, MSOA, Vehicle type, Power train, Parking status, Trip purpose (incl. Commuting status), Charging category (excl. en-route), Annual demand, Rural/Urban, Driver income, Ownership
O3.1/I6.1, O3.2/I6.2 – Annual demand for rapid en-route charging	Scenario, Year, Vehicle type, Charging category (only en-route), Annual demand

Note: The input data columns are only indications of the target columns necessary for the model run. We recognize that the data might be provided to us in multiple data sets, each containing a few target variables that need to be aggregated to arrive at the target input. However, we expect the pre-processing steps that are needed to be straight forward and not to add a large overhead to the development. (e.g. Certain inputs will be provided on a NoHAM zone basis, with a NoHAM to MSOA mapping included and the mapping done as a pre-processing step).

Note: The column names might differ in the model inputs and outputs based on the data set names or better representative names. These names were selected to reflect what the columns would contain. The possibly modified names should be self-explanatory.

Note: The variables in blue are not strictly necessary to calculate the EVCP requirements. Whether or not these are kept will depend on processing times and data availability. To be discussed and decided by TfN during model development.

Core Module Step 4 – Calculate the number of public charge points required in each MSOA, Provisional column structure of inputs, interim outputs and model outputs

Input, Interim output, Model output	Columns
I4.1 – Power assumptions for each charging category	Year, Vehicle type, Power train, Charging category (on-street and destination), Apparent power
I4.1 – Utilisation assumptions for each charging category	Year, Charging category (on-street and destination), Utilization rate
I4.2 – Normalized seasonal variation profile	TBC – TfN summer holiday modelling
I4.3 – Normalized daily profile	TBD - Vehicle type, Power train, Commuting status, Charging category (on-street and destination), Hour, Share of stock charging
O4.0 – Number of EV charging points required in each MSOA for on-street and destination charging	Scenario, Year, MSOA, Charging category (on-street and destination), EVCPs required

Note: The input data columns are only indications of the target columns necessary for the model run. We recognize that the data might be provided to us in multiple data sets, each containing a few target variables that need to be aggregated to arrive at the target input. However, we expect the pre-processing steps that are needed to be straight forward and not to add a large overhead to the development. (e.g. Certain inputs will be provided on a NoHAM zone basis, with a NoHAM to MSOA mapping included and the mapping done as a pre-processing step).

Note: The column names might differ in the model inputs and outputs based on the data set names or better representative names. These names were selected to reflect what the columns would contain. The possibly modified names should be self-explanatory.

Note: The variables in blue are not strictly necessary to calculate the EVCP requirements. Whether or not these are kept will depend on processing times and data availability. To be discussed and decided by TfN during model development.

Core Module Step 5 (1/2) - Determine possible sites for charge points along the MRN, Detailed description of the process

In order to translate the MSOA level forecast demand for EV charging into the identification of specific enroute rapid charging sites on the MRN, a series of filters and further supplementary analysis will be applied to the outputs generated from Tasks 2.1 and 2.3.

Site Filtering Approach	
Land Use – Prospective enroute charging locations and sites of charging demand	The first step will be to identify prospective sites around the MRN and SRN, using land use data to identify clusters of land uses likely to feature parking, and so potentially suitable for intermediate or destination charging, i.e. service stations, retail, food/drink retail. Differential weightings will be applied to land uses and agreed with TfN.
Sites will be filtered based on key localised determinants of charging demand to identify specific areas of higher demand:	
Traffic flow volumes on the MRN	Using DfT AADT Counts for 2022
Distance from the MRN	Testing a range of sensitivities, but likely to range from between 500m to 1km
Forecast MWh demand per MSOA	As a further indicator of localised EV charging demand, though recognising the proportion likely to charge on the MRN may be low
Local reliance on on-street parking	As a further indicator of localised EV charging demand, but also recognising the proportion likely to charge on the MRN may be low
Major delivery depots in the local area	Informed by the emerging TfN freight model

Core Module Step 5 (1/2) - Determine possible sites for charge points along the MRN, Detailed description of the process

Potential supply side barriers and delivery constraints will also be considered. A further filtering mechanism will be developed to promote a broader geographic coverage of site across the MRN. Upon applying the series of spatial filters identified, it will be necessary to sensitivity test the weightings applied to each, in order to effectively filter down the number of prospective sites.

Site Filtering Approach	
Planning restrictions	Conservation areas, flood risk areas
Existing Charging Hubs	Existing DC Rapid Hubs, derived from a synthesised and cleaned version of the National Charge Point Registry and Open Charge Map datasets. Parameters to be defined through sensitivity testing, with existing hubs of 2-4+ DC chargers likely to be included.
Geographic spread and spatial coverage	Buffering around sites with the highest demand rating A further filtering mechanism will be developed to promote a broader geographic coverage of site across the MRN than may otherwise occur, through applying buffers around the sites with the highest demand rating in a given area.
Sensitivity testing to filter the number of prospective sites	Sensitivity test the weightings applied to each, in order to effectively filter down the number of prospective sites to no more than 200 focus areas across the MRN, to ensure the next step is practicable

The methodology will be prototyped in Excel before being implemented in Python. Code will be written in a modular fashion in line with TfN's coding standards and will be pushed to TfN's GitHub regularly during development.

Core Module Step 5 (2/2) - Determine possible sites for charge points along the MRN, Detailed description of the process

The next step is to assess which of these areas carry the greater **number of vehicles making long distance journeys**, and would **cover a given distance into their journey**.

A reassignment approach will be adopted using SATURN reassignment functionality. Steps taken include

- calculate Vkm by vehicle type/trip purpose
- Save in assignment data field using original route choices.
- Highest resultant links will either be from greater distance or higher trip totals (or both).
- Average trip length also calculable
- Seeking MRN links with highest flow and longest trip length.

To expedite the **detailed analysis of EV charging sites** we propose

- a "fixed cost" version of the model could be utilised, where travel times are informed by an original simulation assignment,
- Approximation of original flows allowing **interrogation of assignments** via **selected link** procedures.

Both the above routines would be programmed in python.

We will conduct disaggregate analysis on

- Analysis of **Trip length distribution** by distance bin
- **volume by trip purpose** and
- **speed of journey** will be possible.

Based on this further filters will be applied to refine an assessment of charging demand across the 200 shortlisted sites

Sense checking will be undertaking reviewing a sample of locations identified using desk based checks against Google Street View, and where appropriate the weightings assigned to the different metrics will be adjusted accordingly.

Output of this process will be **GIS based spatial analysis identifying potentially suitable locations** or specific sites for charging infrastructure on the MRN and SRN (catering for BEVs, LDV and HGV and scenarios for 2025 and 2030), to produce spatial and temporal mapping outputs.

DNO Module Steps 1 to 6

DNO Module Step 1r, 2r, 3r – Calculate charging demand profiles for rapid en-route per primary, Provisional column structure of inputs and interim outputs

Input, Interim output, Model output	Columns
O5.0/I6.0 – Shortlist of potentially suitable locations for charging infrastructure for rapid charging	Scenario, Year, Site rank, EVCP site location, Hub size
O6.0/I7.0 – Annual en-route EV charging demand per rapid charging hub (MWh)	Scenario, Year, EVCP site location, Charging category (car/van and HGV en-route), Annual demand
I7.2 – Location of primaries	DNO, Primary ID, Primary location
O7.0/I8.0 – Annual en-route EV charging demand per primary (MWh)	Scenario, Year, DNO, Primary ID, Primary location, Charging category (car/van and HGV en-route), Annual demand
I8.2 – Half hourly charging demand profiles for rapid en-route charging	Scenario, Year, Charging category (car/van and HGV en-route), Normalized daily profile
I8.3 – Seasonal variation factors for rapid en-route charging	Scenario, Year, Charging category (car/van and HGV en-route), Seasonal variation factor
O8.0/I9.0 – Half hourly charging demand profile for rapid en-route EV charging per primary, for representative summer and winter days	Scenario, Year, DNO, Primary ID, Primary location, Charging category (car/van and HGV en-route), Season, Daily profile

Note: The input data columns are only indications of the target columns necessary for the model run. We recognize that the data might be provided to us in multiple data sets, each containing a few target variables that need to be aggregated to arrive at the target input. However, we expect the pre-processing steps that are needed to be straight forward and not to add a large overhead to the development.

Note: The column names might differ in the model inputs and outputs based on the data set names or better representative names. These names were selected to reflect what the columns would contain. The possibly modified names should be self-explanatory.

DNO Module Step 1a, 2a, 3a – Calculate charging demand profiles per charging category per primary, Provisional column structure of inputs, interim outputs

Input, Interim output, Model output	Columns
I6.3 – DNO and MSOA boundaries, for MSOA to DNO mapping	MSOA, DNO
I6.4 – Number of customers per DNO and per primary substation	DNO, Number of primaries, Average number of customers per primary
O6.1/I7.1 – Annual charging demand per charging category (excl. rapid en-route) per customer for each DNO	Scenario, Year, DNO, Charging category (excl. en-route), Annual demand per customer per primary
I7.3 – List of primaries per DNO, Number of customers per primary	DNO, Primary ID, Primary location, Number of customer on primary
I7.4 – Unmanaged/smart home charging share	Charging category (unmanaged/smart home), Share
O7.1/I8.1 – Annual charging demand per charging category (excl. rapid en-route) at each primary	Scenario, Year, DNO, Primary ID, Primary location, Charging category (excl. en-route), Annual demand
I8.4 – Half hourly charging demand profiles for all charging categories (excl. rapid en-route)	Scenario, Year, Charging category (excl. en-route), Normalized daily profile
I8.5 – Seasonal variation factors for all charging categories (excl. rapid en-route)	Scenario, Year, Charging category (excl. en-route), Seasonal variation factor
O8.1/I9.1 – Half hourly EV charging demand profile per charging category (excl. rapid en-route) at each primary, for representative summer and winter days	Scenario, Year, DNO, Primary ID, Primary location, Charging category (excl. en-route), Season, Daily profile

Note: The input data columns are only indications of the target columns necessary for the model run. We recognize that the data might be provided to us in multiple data sets, each containing a few target variables that need to be aggregated to arrive at the target input. However, we expect the pre-processing steps that are needed to be straight forward and not to add a large overhead to the development.

Note: The column names might differ in the model inputs and outputs based on the data set names or better representative names. These names were selected to reflect what the columns would contain. The possibly modified names should be self-explanatory.

DNO Module Step 4p, 5p, 6p – Assess grid impact on primaries, Provisional column structure of inputs, interim outputs and model outputs

Input, Interim output, Model output	Columns
O9.0/I10.0 – Total half hourly EV charging profile per primary, for representative summer and winter days	Scenario, Year, DNO, Primary ID, Primary location, Season, Daily profile
O10.0/I11.0 - Overall peak EV charging demand per primary	Scenario, Year, DNO, Primary ID, Primary location, Peak EV charging demand
I11.2 – Headroom on primaries	DNO, Average headroom on primaries
I11.3 – Unit reinforcement cost per primary	DNO, Average unit reinforcement cost on primaries
O11.0 – Grid impact: Cumulative cost at primary level	DNO, Cumulative reinforcement cost at primary level

Note: The input data columns are only indications of the target columns necessary for the model run. We recognize that the data might be provided to us in multiple data sets, each containing a few target variables that need to be aggregated to arrive at the target input. However, we expect the pre-processing steps that are needed to be straight forward and not to add a large overhead to the development.

Note: The column names might differ in the model inputs and outputs based on the data set names or better representative names. These names were selected to reflect what the columns would contain. The possibly modified names should be self-explanatory.

DNO Module Step 4s, 5s, 6s – Assess grid impact on primaries, Provisional column structure of inputs, interim outputs and model outputs

Input, Interim output, Model output	Columns
O9.1/I10.1 –Total half hourly EV charging demand profile (excl. rapid en-route demand) per DNO, for representative summer and winter days	Scenario, Year, DNO, Season, Daily profile
O10.1/I11.1 – Overall peak EV charging demand (excl. rapid en-route demand) per DNO	Scenario, Year, DNO, Peak EV charging demand
I11.4 – Unit reinforcement cost of secondaries	DNO, Average unit reinforcement cost on secondaries
O11.1 – Grid impact: Cumulative cost at secondary level	DNO, Cumulative reinforcement cost at secondary level

Note: The input data columns are only indications of the target columns necessary for the model run. We recognize that the data might be provided to us in multiple data sets, each containing a few target variables that need to be aggregated to arrive at the target input. However, we expect the pre-processing steps that are needed to be straight forward and not to add a large overhead to the development.

Note: The column names might differ in the model inputs and outputs based on the data set names or better representative names. These names were selected to reflect what the columns would contain. The possibly modified names should be self-explanatory.

Appendix

Reference Studies

- EV Charging Behaviour Study, National Grid, Element Energy (2019)
- Quantifying the electric vehicle charging infrastructure gap in the United Kingdom, ICCT (2020)
- DfT Vehicle Licensing Statistics - Table VEH0132a Ultra low emission vehicles (ULEVs) 1 licensed at the end of the quarter by upper and lower tier local authority 2, United Kingdom from 2011 Q4
- The CCC - Sixth Carbon Budget (2020)
- Society of Motor Manufacturers and Traders (SMMT) - SMMT new car market and parc outlook to 2035 by powertrain type (2021)
- Deloitte – 'Hurry up and wait'(2020)
- Alternative Fuels Infrastructure Directive (AFID) (2014)
- Competition & Markets Authority (CMA) (2021) - Policy Exchange, Forecasts from CCC, Transport & Environment, Delta-EE and ICCT - all 2020.

Transport for the North Electric Vehicle Charging Infrastructure (EVCI) Model

2024 Model Upgrades

Statement of Methodology

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ARCADIS

This slide pack lays out the approach to Electric Vehicle Charging Infrastructure (EVCI) model upgrades and assessments (2024).

Description of high-level model structure

- The EVCI model main upgrade outputs will include:
  - Assessment of current headroom versus power demand for 2025, 2030 and 2035.
  - Identification of commercially important sites, not commercially important sites and challenged sites.
  - Recommended adjustments to utilisation percentages within Transport for the North (TfN's) existing scenario and a new utilisation scenario.
  - A new behavioural scenario for LPCHs.
  - Identification of locations with potential for Freight Intermodal Interchanges and Multi Modal Hubs.

Accompanied by technical specifications and method reporting.

Model upgrades in brief

1. A **Review** on model work to date, assessed against industry changes and new intelligence.
2. Seeking **integration of energy grid capacity into TfN's EVCI Framework.**
3. Identification of locations with varying key characteristics impacting **Commercial Viability.**
4. Analysis of **EVCI utilisation** scenarios.
5. Behavioural change analysis of **Local Public Charging Hubs (LPCHs).**
6. Identification of locations with potential for **Freight Intermodal Interchanges and Multi Modal Hubs.**

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Contents

A review was undertaken on work to date, assessed against industry changes and new intelligence.

Key Recommendations

- All datasets require reviewing in regard to source and frequency of updates. This is to ensure the EVCI model utilise the most representative data.

Key Datasets to Review
Electricity consumption and power and utilisation assumptions are recommended to be updated annually rather than every 5 years. This is to align with new datasets being produced on annual basis, and to be consistent with other datasets integrated into the model.
TfN is currently refreshing datasets with Zap Map information. Zap Map or equivalent is suggested to be integrated within all datasets for chargepoint locations, alongside the National Charge Point Registry and Open Charge Map.
During stakeholder engagement, Distribution Network Operators (DNO's) notified the team that new Distribution Future Energy Scenarios (DFES) information will be published. It is recommended that open communication with DNOs continue to ensure the most up-to-date information is integrated.
Several assumptions utilise International Council on Clean Transportation (ICCT) values, which is a reliable data source. However, the values were collected in 2019. The Electric Vehicle (EV) market has developed dramatically since; therefore, other data sources should be considered in the model assumptions to add validity. Continually monitor the EV market through noting relevant best practice, news articles, research and other reliable sources.
All scenarios were formulated to project variances of EV uptake based on UK Government policy. Given likely timescale changes to the ban on the sale of ICE vehicles, TfN will be refreshing its future travel scenarios to reevaluate against any new pathways for the sales of vehicles.

Contents

The model has integrated current grid capacity assessments.

Description of high-level model structure

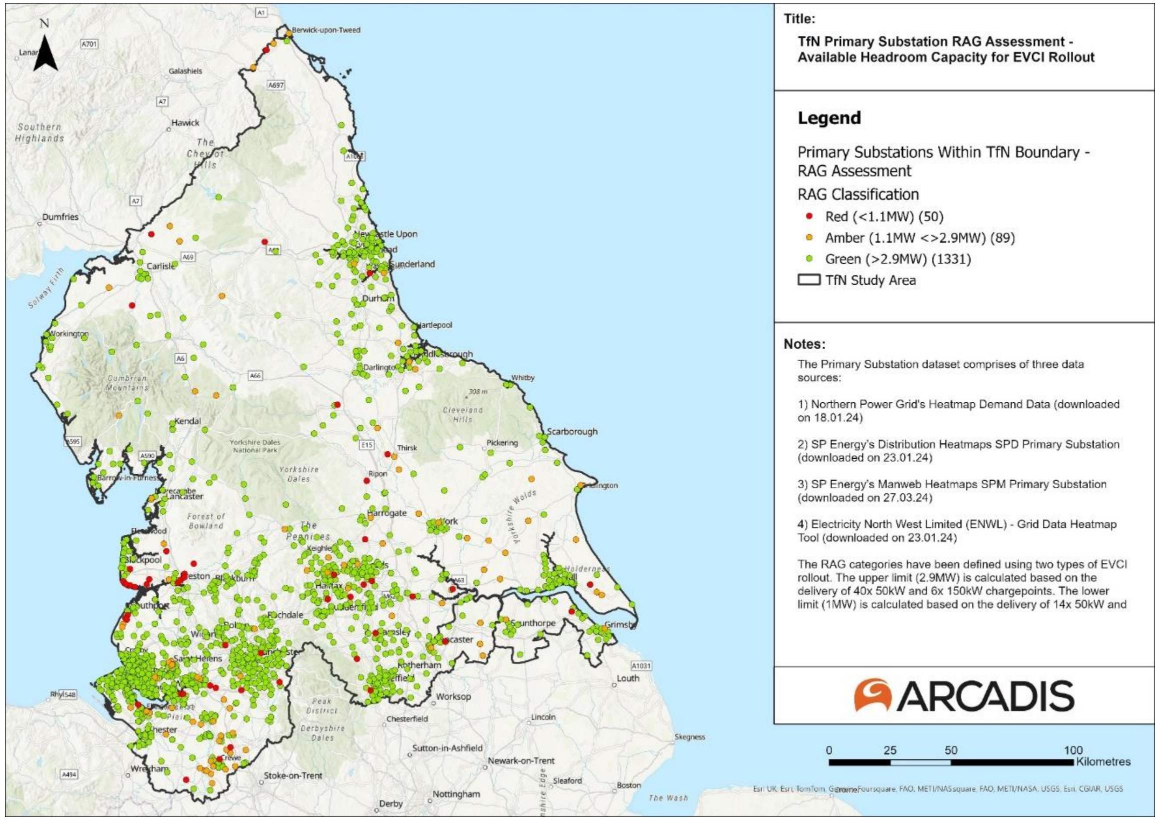
- To calculate headroom capacity, MW as a unit of power was used from the datasets or the following equation was utilised:

  Demand Headroom = Firm Capacity – Peak Demand

- A RAG classification, based on primary substation's existing capacity, was applied to identify and categorise which primary substations could handle increasing demand for EV charging without needing additional reinforcement.

Headroom Capacity	RAG Rating
< 1.1 MW	Red
1.1 – 2.9 MW	Amber
> 2.9 MW	Green

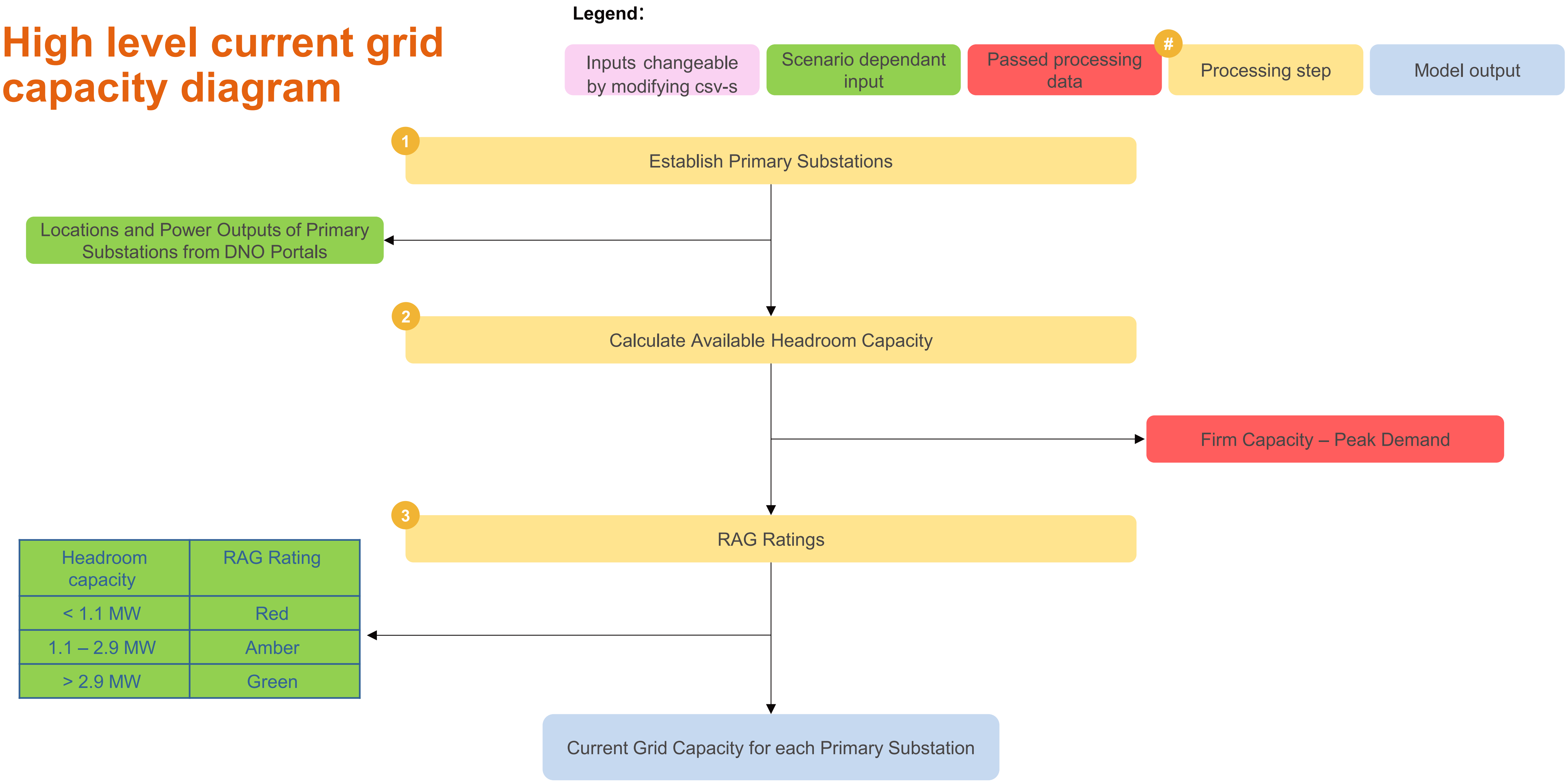
Model inputs



Note: Primary Substation data was collected on 23/01/24 from each of the DNOs' public data portals.

TRANSPORT FOR THE NORTH ARCADIS

High level current grid capacity diagram



Headroom capacity	RAG Rating
< 1.1 MW	Red
1.1 – 2.9 MW	Amber
> 2.9 MW	Green

Note: Primary Substation data was collected on 23/01/24 from each of the DNOs' public data portals.

The model has integrated future grid capacity assessments.

Description of high-level model structure

- The coverage areas for primary substations were collected from all DNOs. In addition, guidance on the development of the primary substation coverage area was provided during a stakeholder engagement workshop with the DNOs.
- In instances where coverage area datasets were overlapping, links between the two datasets were established based on a common attributes.
- The inputs that were selected for the defined parameters within the EVCI Framework. The EVCI Framework provided CSV outputs for each set of configurations which were then collated and visualised at an Middle Layer Super Output Area (MSOA) level using ArcGIS Pro.
- The charging power assigned values for charger types within TfN’s existing model were used to calculate future demand in kW.

Model inputs

Charging Category	Power (kW)					
Destination	7kW					
HGV Depot	2025	20kW	2030	24kW	2035	28kW
Home	7kW					
Public Residential	7kW					
Workplace	7kW					

Note: Coverage area data was collected from each of the DNOs’ public data portals on 07/07/24. DNO engagement workshops were also undertaken to create a deeper understanding of the overlapping coverage area occurrences.

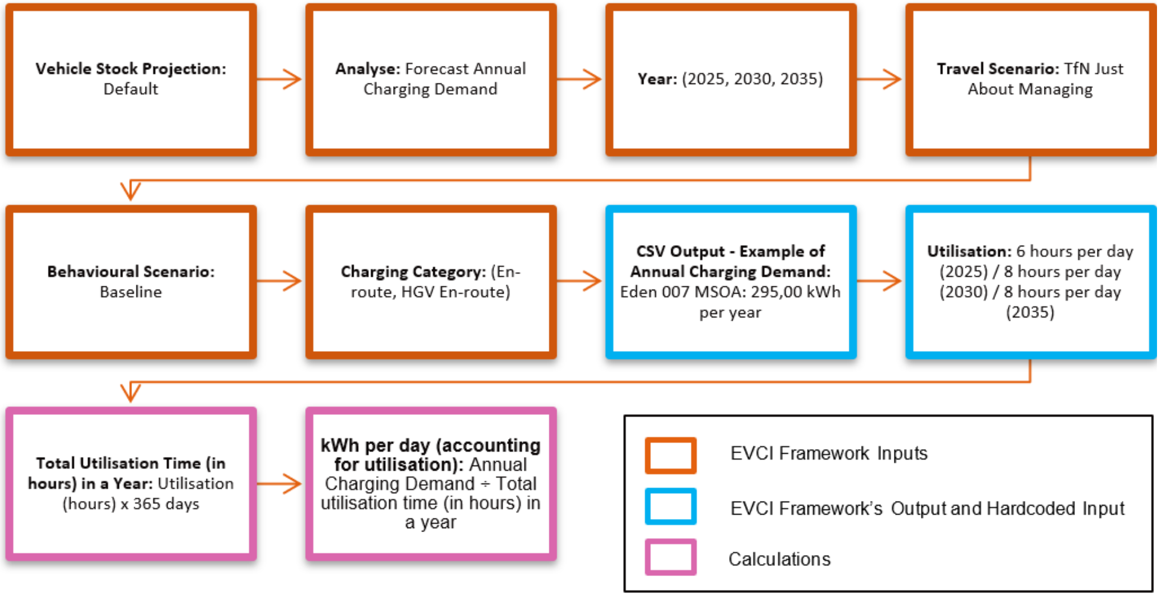
The model has integrated future grid capacity assessments.

Description of high-level model structure

- A set of further calculations were required to extract approximate rapid charging numbers for the forecasted years.
- To ensure rapid charging infrastructure has been accounted for within the calculations for future energy demand, a different set of inputs were used within the EVCI Framework. The Just About Managing scenario was chosen as it is considered the baseline travel scenario.

Vehicle Stock Projection (Fixed)	Default
Analyse (Fixed)	Forecast: EVCP requirements
Year	2025 | 2030 | 2035
Administrative Boundaries (Fixed)	MSOA
Travel Scenario (Fixed)	TfN – Just About Managing
Behavioural Scenario (Fixed)	Baseline

Model inputs



Note: Coverage area data was collected from each of the DNOs' public data portals on 07/07/24. DNO engagement workshops were also undertaken to create a deeper understanding of the overlapping coverage area occurrences.

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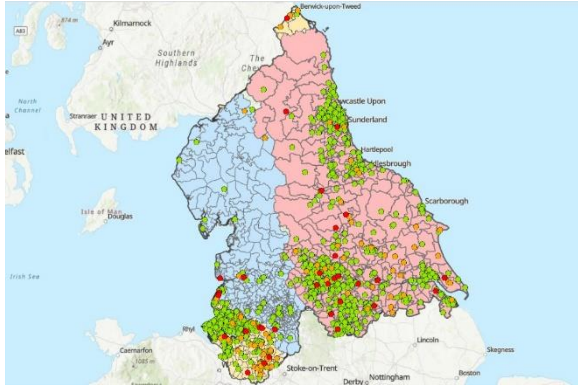
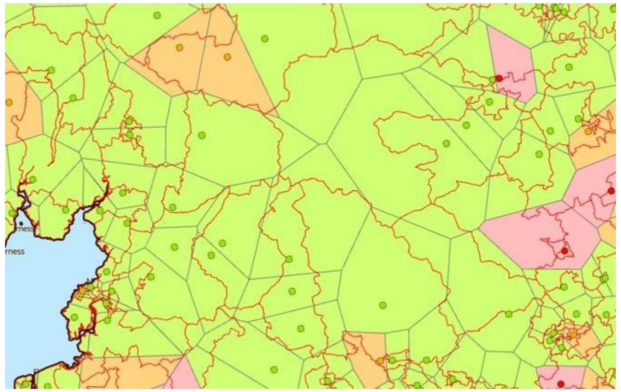
The model has integrated future grid capacity assessments.

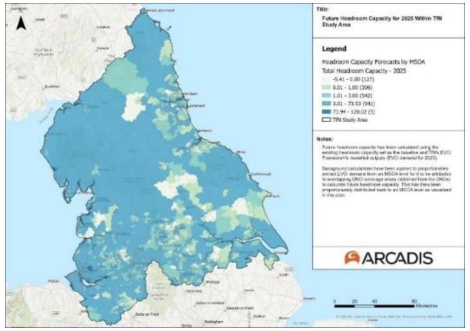
Description of high-level model structure

- The “Forecast: EVCP Requirement” data and the “Annual Charging Demand” data, provides the headroom capacity has for each primary substation coverage area polygon for 2025, 2030 and 2035.
- Each of the polygon’s assigned headroom capacity is then proportionately distributed based on the overlap between the coverage area and the MSOA.
- For instance, if it overlaps with two different coverage areas evenly, half of the total energy requirements will be assigned and deducted from each primary substation’s existing headroom capacity.

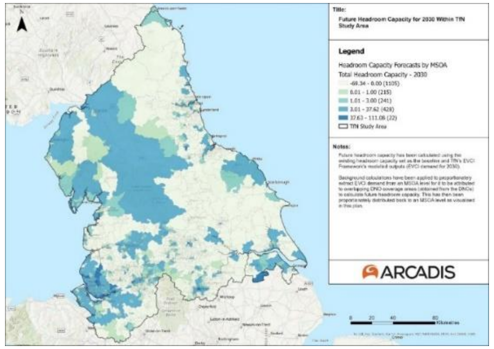




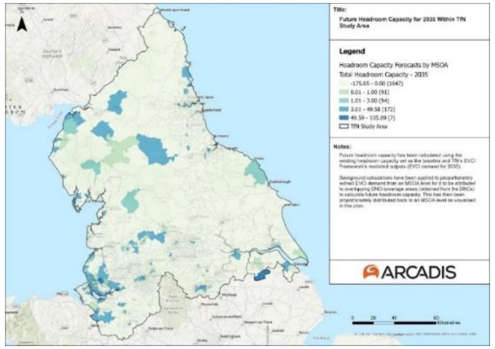
Future Headroom Capacity for 2025



Future Headroom Capacity for 2030



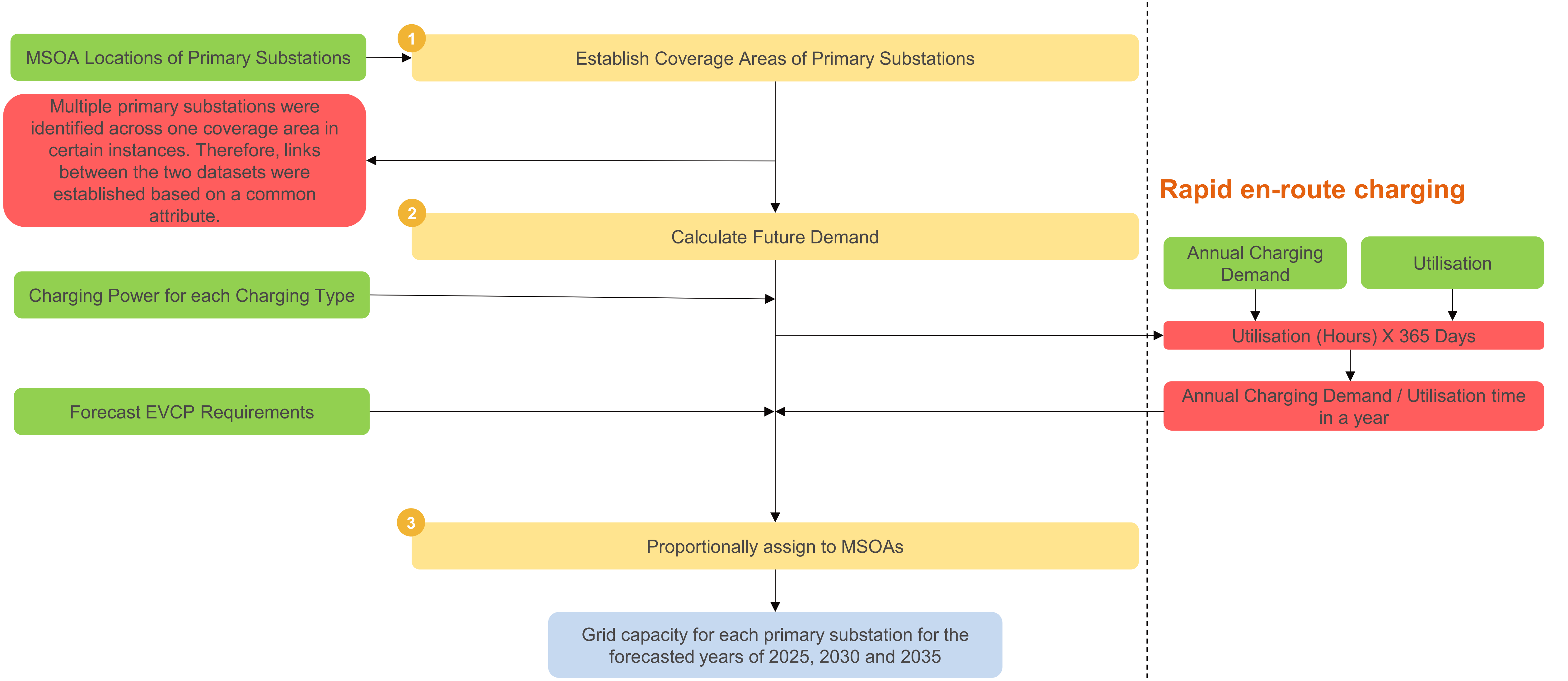
Future Headroom Capacity for 2030



High level future current grid capacity diagram

Legend:

- Inputs changeable by modifying csv-s
- Scenario dependant input
- Passed processing data
- # Processing step
- Model output



Note: Primary Substation data was collected on 23/01/24 from each of the DNOs' public data portals.

The model has integrated current and future grid capacity assessments.

Assumptions, Risks and Limitations on current grid capacity

- It should be noted that the data used for this study was obtained directly from SPEN, ENWL and NP data platforms. It is acknowledged that these data sources are a snapshot in time. Therefore, regular updates of the data sources will be recommended to maintain accuracy and applicability.
- Secondary Substations have been excluded from this study. Due to the large number of secondary substations on the network, there are complexities in obtaining and maintaining accurate data for each asset by DNOs. The supply to secondary substations is aggregated through a Primary Substation in the first instance, and therefore this is the most important check to understand the capacity within an area and is considered sufficient to meet the requirements of the study.
- It is also noted that any potential discrepancy in the data obtained would need to be confirmed directly with the appropriate DNO.

Assumptions, Risks and Limitations on future grid capacity

- It should be noted that the future grid capacity assessment which is shown at an MSOA level should only be considered as a high-level strategic planning indication. Further site-specific investigation will be required to understand areas of concern or opportunity.
- The assessment reflects the current state of capacity across the study area. Further work would be needed to determine if upgrades/reinforcements would be required for a greater number of primary substations or rather a few key primary substations across the study area.
- Furthermore, it should be emphasised that firm capacity has been used to account for the baseline headroom capacity and therefore, this assessment does not account for troughs in demand at certain times of the day. By taking the firm capacity, the visualisation is considering a worst-case scenario approach.

Contents

TRANSPORT FOR THE NORTH ARCADIS

The model has integrated a new utilisation scenario.

Description of high-level model structure

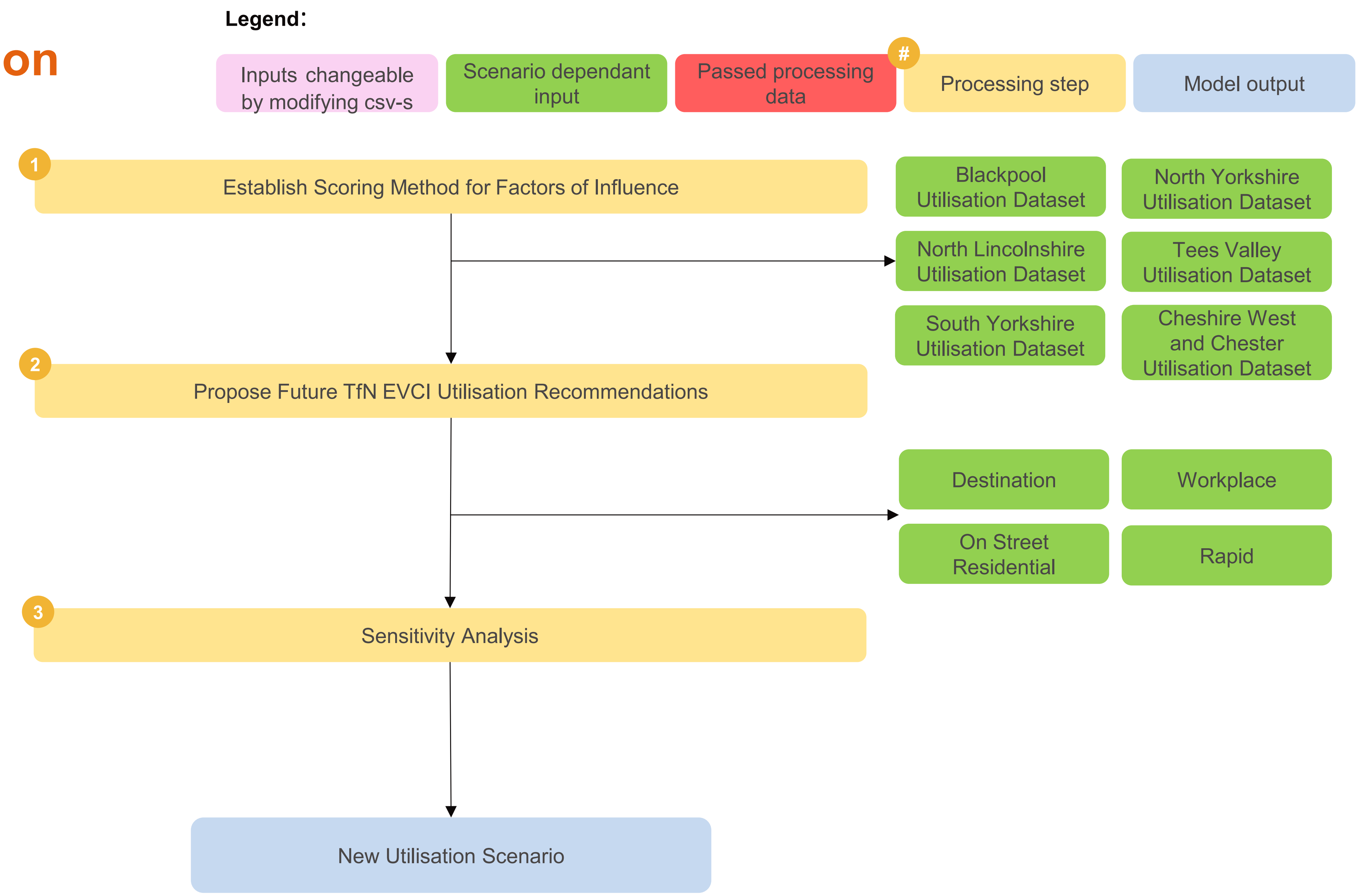
- Considering insights from desktop research and analysis of LA utilisation data, a proposed update to TfN's existing utilisation scenario was developed. This considered recent findings on EVCI utilisation, national policy adjustments and LEVI rollout implications.
- Due to the limitations of the datasets available in representing the utilisation trends of the entire TfN region, a sensitivity test has been produced. The sensitivity test will allow for consideration of an alternative utilisation scenario. A 25% sensitivity test has been implemented on the proposed utilisation assumptions as it aligns with the findings from LA datasets, desktop research, and expected future trends in utilisation:
  - The low sensitivity aligns with the existing low utilisation shown through LA datasets and desktop research.
  - The higher sensitivity allows for potential higher utilisation of chargepoints as EV adoption increases.

Assumptions, Risks and Limitations

- Recommendations have been made in line with datasets provided, and with national policy and trends. If additional, significant datasets are available, expectations around utilisation could be reviewed in line with the newly available datasets. This would validate or potentially challenge the recommendations. Particularly, datasets from densely populated urban conurbations, such as city regions, would give greater confidence and certainty due to greater statistical significance.

Note: National policy and trends were considered in April 2024

High level utilisation diagram



TRANSPORT FOR THE NORTH ARCADIS

Proposed utilisation and sensitivity test assumptions

Proposed Utilisation Assumptions

Hours/Day	2025		2030		2035	
	Existing	Proposed	Existing	Proposed	Existing	Proposed
On-street residential	4	4	5	6	6	8
Destination	4	4	6	5 ^	7	7 ^
Workplace (weekday only)	6	6	6	6 v	6	6
Rapid	6	6	8	7 v	8	8

Note: Recommendations align with provided datasets and desktop research on utilisation, national policy and trends.

Sensitivity Test Assumptions

Hours/Day	2025			2030			2035		
	Low Sensitivity	Proposed	High Sensitivity	Low Sensitivity	Proposed	High Sensitivity	Low Sensitivity	Proposed	High Sensitivity
On-street residential	3	4	5	4.5	6	7.5	6	8	10
Destination	3	4	5	3.75	5	6.25	5.25	7	8.75
Workplace (weekday only)	4.5	6	7.5	4.5	6	7.5	4.5	6	7.5
Rapid	4.5	6	7.5	5.25	7	8.75	6	8	10

Note: Sensitivity scenario has been modelled to understand changes in EVCI required if assets were to be utilise a greater proportion of the time. This is aligning with asset management best practice, to maximise utilisation and also known as 'sweating the asset'.

Contents

The model has integrated a local public charging hub scenario.

Description of high-level model structure

- A LPCH is a grouped hub of charge points set in more suburban areas, typically providing a mixture of slow to fast AC chargers, and a number of rapid chargers (TfN, 2022). Example locations include private car parks and local authority / community car parks, such as schools and libraries.
- A new behaviour scenario has been created to explore the shift from on-street residential charging and on-route charging towards LPCHs. The LPCHs assumptions have been generated by splitting demand away from the ‘on-street residential charging’ and ‘on-route charging’ baseline assumptions, presented in TfN’s Statement of Methodology; which were based on the assumptions used within the ICCT charging infrastructure reports.

Assumptions, Risks and Limitations

- The output is to develop an additional behavioural scenario to incorporate into TfN’s EVCI model. This scenario splits demand from existing (baseline) on-street and on-route charging assumptions. By looking at only the existing demand, it does not capture the impact of the new demand that is created as a result of an alternative charging option. For instance, a lack of available charging options for users without access to private charge points or off-street parking prevents drivers from switching to an EV - as it may be considered a 'lifestyle change' to accommodate the requirements of a battery vehicle. However, if a more convenient, local public charging option is available, this reduces the barriers to EV uptake and may increase demand, as a result.

Note: National policy and trends were considered in March 2024.

The model has integrated a local public charging hub scenario.

Charging behaviour assumptions – changes made introducing a local public charging hub scenario

Powertrain	Commuting Status	Home Charging Availability	Home Charging	On-street residential charging	Destination charging	Work Charging	En-route charging	Local public charging hub
BEV	Commuter	Yes	70%	0%	5%	20%	4% (-1%)	1%
		No	0%	20% (-15%)	10%	45%	8% (-2%)	17%
	Non Commuter	Yes	85%	0%	5%	0%	8% (-2%)	2%
		No	0%	45% (-30%)	15%	0%	8% (-2%)	32%
PHEV	Commuter	Yes	65%	0%	5%	30%	0%	0%
		No	0%	15% (-15%)	5%	65%	0%	15%
	Non Commuter	Yes	90%	0%	10%	0%	0%	0%
		No	0%	45% (-35%)	20%	0%	0%	35%

- Values in red represent a decrease in charging demand share for on-street residential/en route charging
- Values in green represent an increase in charging demand share for local public charging hub charging

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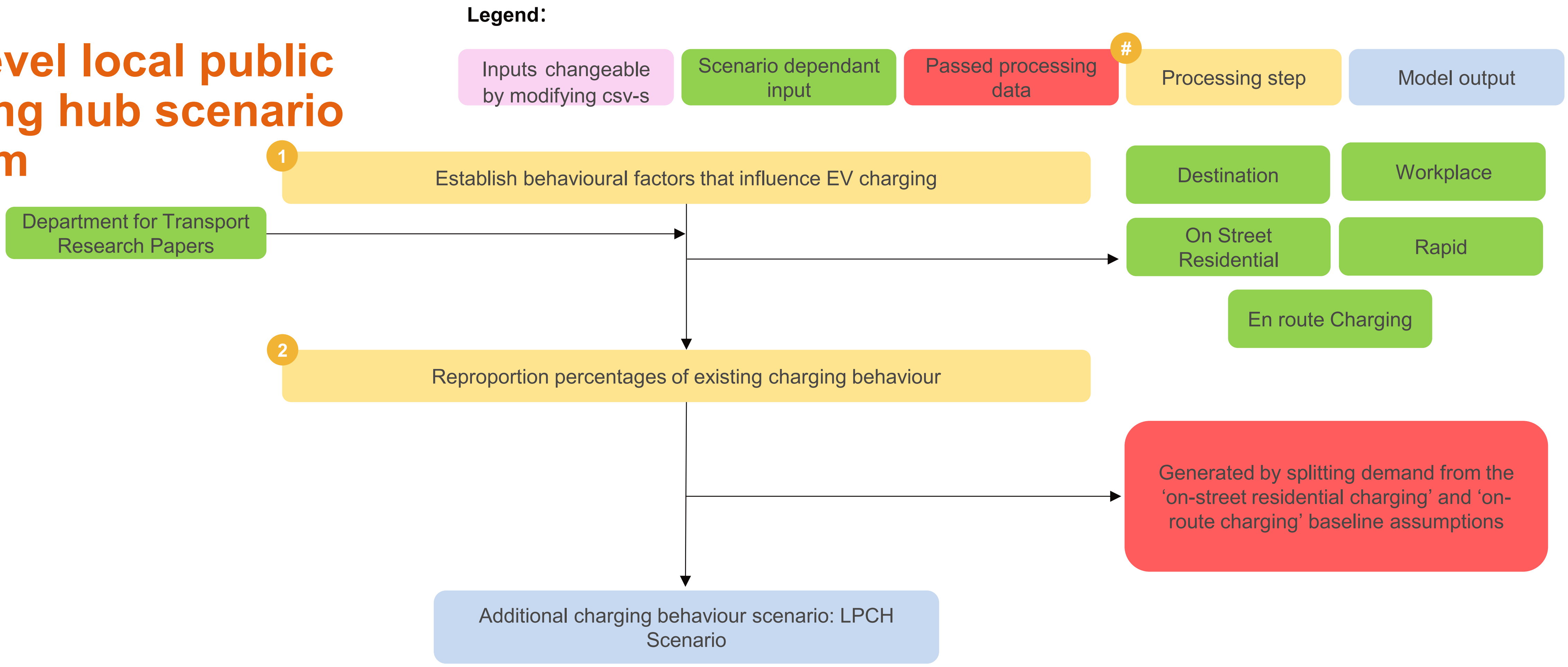
High level local public charging hub scenario diagram



TRANSPORT FOR THE NORTH ARCADIS

Contents

The model has integrated a multi modal hub and freight intermodal interchanges assessment.

Description of high-level model structure

- To develop an audit of key potential freight and multi modal hub locations across the region, different datasets will be analysed for freight and multi modal hubs due to their different uses and characteristics.
- Datasets have been collected which cover the factors of influence identified for multi modal hubs and freight intermodal interchanges.
- A scoring system has been developed and agreed with the TfN partnership for each parameter/layer and has then been averaged for each use case (multi modal hubs and freight intermodal interchanges).

Assumptions, Risks and Limitations

- Data was collected on 29/05/2024. To determine suitable and favourable locations for the development of new freight and multi modal hubs a scoring criterion using a series of heatmaps has been developed on ArcGIS Pro.
- This has been developed using a series of geospatial datasets, downloaded from publicly available data sources and from TfN, ranked by their feasibility.
- Therefore, it should be emphasised that individual key stakeholders may consider different factors of influence when deciding if a site is appropriate for multi modal hubs or freight intermodal interchanges.
- Further specific site investigation and development work is advised for any locations of interest.

Note: Data was collected on 29/05/2024.

Core Model Inputs

Data Layer	Score
Grid Capacity, Primary Substation Locations , DNO Data Portals	**Red – 1** **Amber – 3** **Green – 5**
Existing EVCI Network, National Chargepoint Registry	**5: 1 – 2** 4: 3 – 5 3: 6 – 9 2: 9 – 19 **1: 20+**
EV Forecast, TfN EVCI Model Datasets	**1: 0 – 78** 2: 79 – 95 3: 96 – 111 4: 112 – 131 **5: 132+**
EVCI Forecast, TfN EVCI Model Datasets	**1: 0 – 1139.85** 2: 1139.86 – 1361.64 3: 1361.65 – 1614.36 4: 1614.37 – 1877.41 **5: 1877.42+**
Environmental Considerations, Flood Zones, Conservation Areas and SSI , Gov.UK and Magic Maps	**1: 0 – 15m** 2: 15 – 30m 3: 30 – 40m 4: 40 – 60m **5: 60m+**

Multi Model Hub Model Inputs

Data Layer	Score
Transport Hub Infrastructure, Rail Stations and Bus Stations, Open Street Maps	**5: 0 – 50m** 4: 51 – 100m 3: 101 – 200m 2: 201 – 400m **1: 401+**
OD Rail Demand, Rail Station Patronage Demand, Office for Rail and Road	**1: 0 – 35,000** 2: 35,001 – 200,000 3: 200,001 – 5,000,000 4: 5,000,001 – 11,000,000 **5: 11,000,000+**
Proximity to Highway Network, Road type categorisation, Open Street Map	**5: 0 – 10m** 4: 11 – 50m 3: 51 – 100m 2: 101 – 400m **1: 401m +**

Freight Intermodal Interchanges Model Inputs

Data Layer	Score
Proximity to Highway Network, Road type categorisation, Open Street Map	**5: 0 – 1500m** 4: 1500 – 3000m 3: 3000 – 4500m 2: 4500 – 6000m **1: 6000m -**
Land Use Data, Warehousing information, GOV.UK, TfN and LA Planning Departments	**1: 0 – 76.5** 2: 76.6 – 1265.8 3: 1265.9 – 19744.5 4: 19744.6 – 306873.7 **5: 306873.8+**
Traffic Demand, HGV Demand and LGV Demand, TfN Datasets	**1: 0 – 8.0001** 2: 8.0002 – 39.0001 3: 39.0002 – 156.0001 4: 156.0002 – 611.0001 **5: 611.0002+**
HGV Location, O License Data, GOV.UK	**5: 0 – 200.00001m** 4: 200.00002 – 400.00001m 3: 400.00002 – 600.00001m 2: 600.00002 – 800.00001m **1: 800.00002m +**

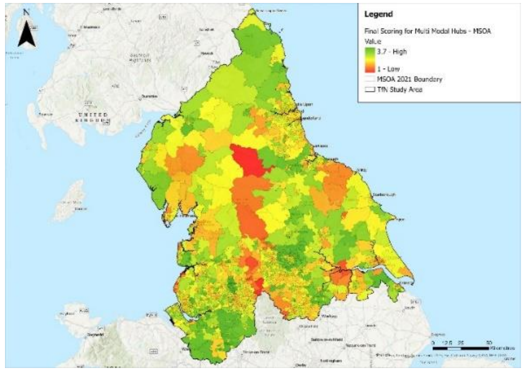
The model has integrated a multi modal hub and freight intermodal interchanges assessment.

Description of high-level model structure

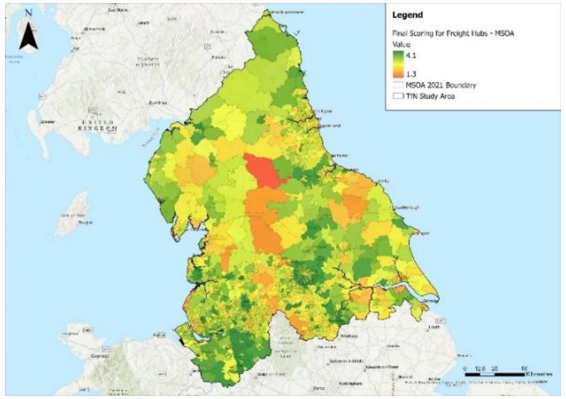
- The analysis then takes an average of assessed layers (averaged on a 5m-by-5m cell basis) and generates a heat map highlighting high and low priority areas within the study region.
- Once the final heatmap is produced, an MSOA boundary is overlayed and is used to generate 'zones' to average all 5m-by-5m cells within each MSOA boundary / zone. This enables the provision of a single score attributed for each MSOA across the TfN study area.
- TfN are exploring the provision of these outputs in LOSA (Lower Super Output Area) for our partners to improve the usability of this function.

Model Inputs

Final Scoring for Multi Modal Hubs at an MSOA Level



Final Scoring for Freight Intermodal Interchanges at an MSOA Level



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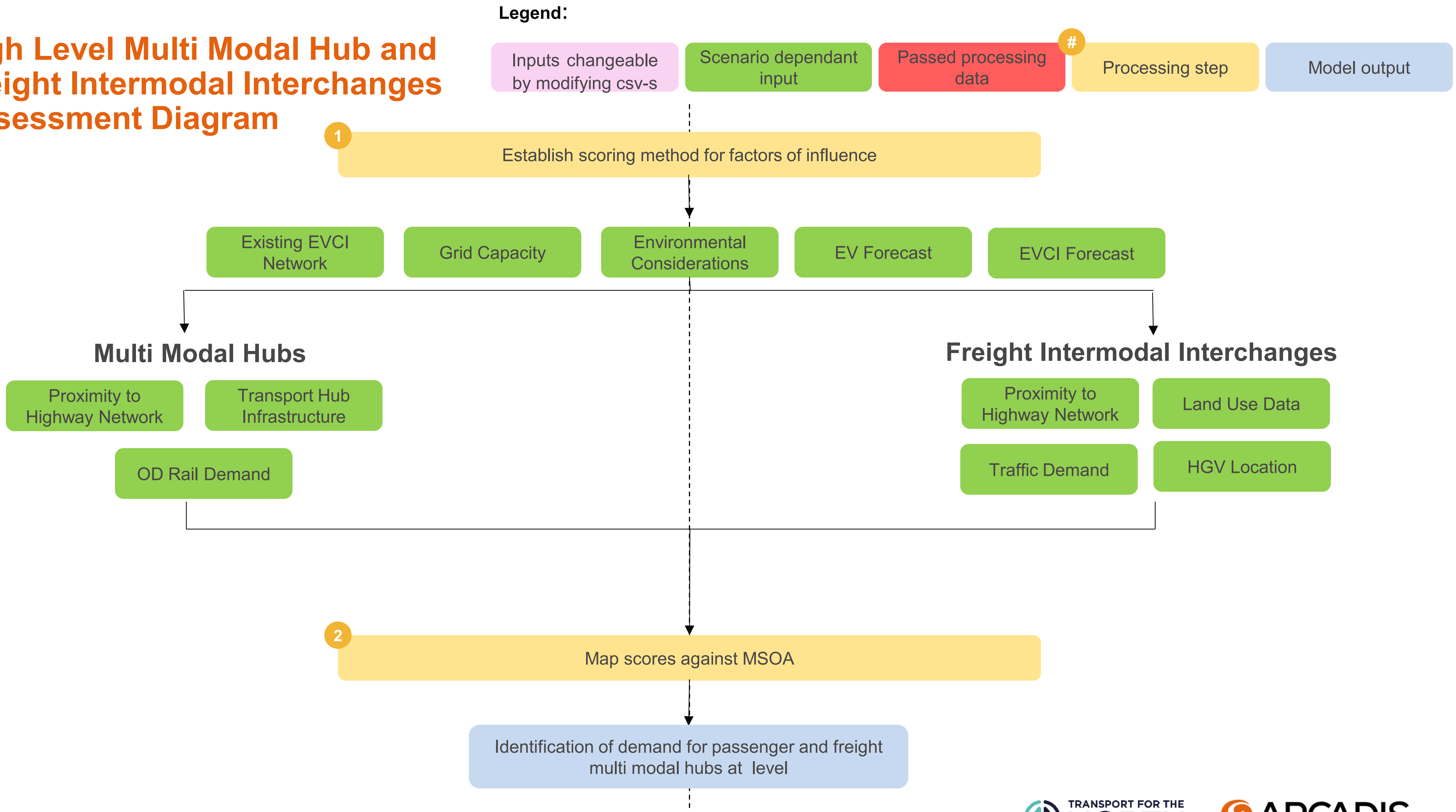
ARCADIS

High Level Multi Modal Hub and Freight Intermodal Interchanges Assessment Diagram



Core Module data sources

Input data	Confidence in inputs over model time period	Recommended update frequency	Source
2.1 - Power outputs of primary substations	Short term (2030)	Annually	Various – SPEN, ENWL and NP data portals
2.2 - Coverage areas of primary substations	Short term (2030)	Annually	Various – SPEN, ENWL and NP data portals
2.3 – Rapid Charging Demand	Mid term (2040)	When TfN models updated	TfN model
2.4 – Rapid Charging Utilisation Assumptions	Mid term (2040)	When TfN models updated	TfN model
2.5 – Charging Power Assumptions	Mid term (2040)	When TfN models updated	TfN model
2.6 – Forecast EVCP requirements	Mid term (2040)	When TfN models updated	TfN model
3.1 – Population Density	Mid term (2040)	Review when dataset is updated	Office for National Statistics
3.2 – Indices of Multiple Deprivation	Mid term (2040)	Review when dataset is updated	Ministry of Housing, Communities and Local Government
3.3 – Proximity to MRN	Mid term (2040)	Review when dataset is updated	Ordnance Survey
3.4 – Flood Risk	Mid term (2040)	Review when dataset is updated	Environment agency
3.5 – Grid Capacity	Short term (2030)	When TfN models updated	TfN model upgrade

Core Module data sources

Input data	Confidence in inputs over model time period	Recommended update frequency	Source
4.1 – Utilisation datasets	Mid term (2040)	When TfN models updated	Various – Local authority datasets within the region.
4.2 – Utilisation Assumptions	Mid term (2040)	When TfN models updated	TfN model
5.1 – Charging Behaviour Assumptions	Mid term (2040)	When TfN models updated	TfN model
6.1 – Grid Capacity	Short term (2030)	Annually	TfN model upgrade
6.2 – Existing EVCI Network	Mid term (2040)	Review when dataset is updated	National Chargepoint Registry
6.3 – EV Forecast	Mid term (2040)	When TfN models updated	TfN model
6.4 - EVCI Forecast	Mid term (2040)	When TfN models updated	TfN model
6.5 – Environmental Considerations	Mid term (2040)	Review when dataset is updated	Various - Flood Zones, Conservation Areas and SSI , Gov.UK and Magic Maps

Core Module data sources

Input data	Confidence in inputs over model time period	Recommended update frequency	Source
6.6 – Transport Hub Infrastructure	Mid term (2040)	Review when dataset is updated	Open Street Maps
6.7 – OD Rail Demand	Mid term (2040)	Review when dataset is updated	Office for Rail and Road
6.8 – Proximity to Highway Network	Mid term (2040)	Review when dataset is updated	Open Street Map
6.9 – Land Use Data	Mid term (2040)	Review when dataset is updated	Warehousing information, GOV.UK, TfN and LA Planning Departments
6.9 – Traffic Demand	Mid term (2040)	When TfN models updated	TfN dataset
6.10 – HGV Location	Mid term (2040)	Review when dataset is updated	GOV.UK

Appendix

Reference Studies

NP Heatmap Demand
Data: https://northernpowergrid.opendatasoft.com/explore/dataset/heatmapdemanddata/table/ ?disjunctive.substation_name

SPEN's Distribution Heatmaps SPD Primary Substation: https://spenergynetworks.opendatasoft.com/explore/dataset/distributed-generation-sp-distribution-heat-maps-spd-grid-substations/information/

SPEN's Manweb Heatmaps SPM Primary Substation: https://spenergynetworks.opendatasoft.com/explore/dataset/distributed-generation-sp-manweb-heat-maps-spm-primary-substations/table/

ENWL Grid Data Heatmap Tool: https://www.enwl.co.uk/get-connected/network-information/heatmap-tool/

NP Coverage Area:
https://northernpowergrid.opendatasoft.com/explore/dataset/substation_combined_service_areas/information/?disjunctive.primary&disjunctive.substation_class&disjunctive.demand_classification&disjunctive.summary_overall_primary_classification

SPEN SPD Coverage Area: https://spenergynetworks.opendatasoft.com/explore/dataset/ndp-spd-primary-substation-polygons/information/

SPEN SPM Coverage Area: https://spenergynetworks.opendatasoft.com/explore/dataset/ndp-spm-primary-group-polygons/information/

ENWL Coverage Area: https://electricitynorthwest.opendatasoft.com/explore/dataset/ndp-pry-voronoi/information/

Population Density: Population density - Office for National Statistics (ons.gov.uk)

Indices of Multiple Deprivation: English indices of deprivation 2019 - GOV.UK (www.gov.uk)

Flood Risk: Flood map for planning - GOV.UK (flood-map-for-planning.service.gov.uk)

Appendix

Reference Studies

Green Finance Institute, Demystifying Utilisation: https://www.greenfinanceinstitute.com/wp-content/uploads/2023/06/GFI-DEMYSTIFYING-UTILISATION.pdf

Climate Change Committee, Peak EV Charging demand on the strategic road network: https://www.theccc.org.uk/publication/peak-ev-charging-demand-on-the-strategic-road-network-systra/

Department for Transport, Public Electric Vehicle Charging Infrastructure Deliberative and quantitative research with drivers without access to off-street parking: Public Electric Vehicle Charging Infrastructure. Deliberative and quantitative research with drivers without access to off-street parking. Research report. (publishing.service.gov.uk)

Department of Transport, National Travel Survey 2014: Multi-Stage trips: National Travel Survey factsheet - Multi-stage trips (publishing.service.gov.uk)

Transport for the North, Policy Position Statement: Multimodal Hubs: https://transportforthenorth.com/wp-content/uploads/TFN_PolicyPositionStatement_MultiModalHub.pdf

Government Office for Science, Understanding the UK Freight Transport System: https://assets.publishing.service.gov.uk/media/5c614f7340f0b676c66a2620/fom_understanding_freight_transport_system.pdf

Transport for the North EVCI New Tools and Modelling Updates

2025 Modelling Updates

Statement of Methodology

Contents

Walking Catchment Tool

High-Level Description of Tool

The EV Charging Catchment Tool is designed to calculate the walking catchment areas around points of interest. This may include car parks, existing or planned charging infrastructure, or relating these to housing with no driveway access. Walking catchments serve as an indicator of how accessible a charger is to a local area, so that users can benefit from their usage over several hours in a practical manner.

Datasets are flexible based on implementation, but require:

- Point coordinates of potential charging sites,
- A grid coordinate system for the area of assessment,
- A road/paving/path network suitable for modelling walking routes.

Method

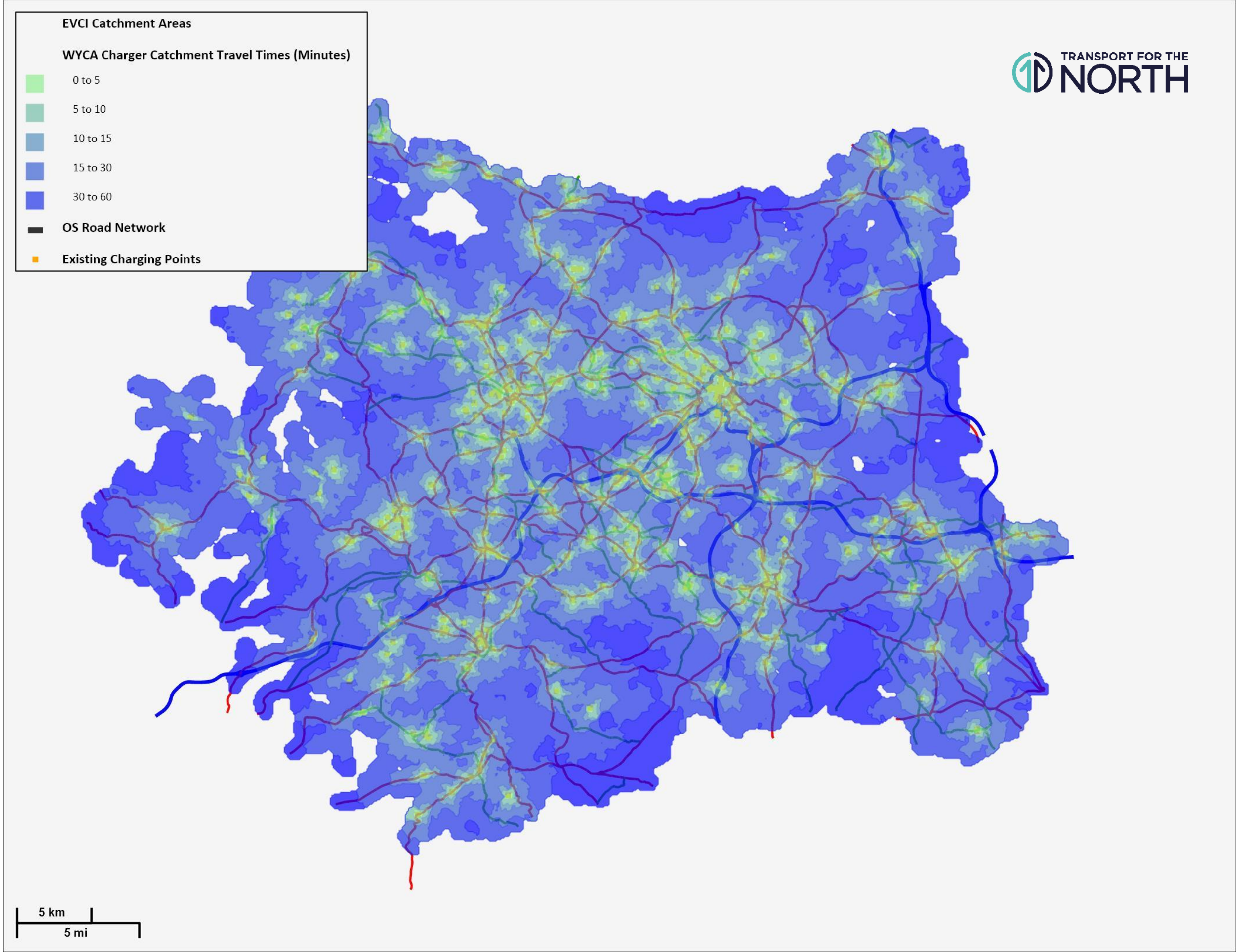
Using TRACC, the specified area of analysis, typically a combined authority, is converted into a 100m grid segmentation. 100 meter-width tiles is chosen by default, determined via the balancing of model run time and computational intensity with preserving a walking time accuracy for a localised neighbourhood.

The model uses TRACC's default walking parameters, with adjustment to the allowed off-route access/egress distances dependent upon the resolution and accuracy of the chosen travel network. Charging locations are given to the model to serve as destinations.

For each origin-destination pair, a walking time is calculated, with the calculation suspended for the instance based on parameters of unsuitability. Each origin point of the grid is awarded its fastest access time available from all of its viable destination pairs

EV Charging Catchment Tools

Charging Catchment Results for WYCA using 2025 Q3 Registered Zap Map Chargers



Contents

Pavement and road widths assessment

TRANSPORT FOR THE NORTH

Overview

This is designed to accurately measure the dimensions of pavements and roads to evaluate their suitability for on-street electric vehicle (EV) charging. This includes potential installation options such as build-outs, cross-pavement connections, lamppost integration, and other on-street charging. Road and pavement width is a critical factor in determining feasible parking configurations and ensuring pedestrian accessibility remains a key consideration. TfN and partners have found valuable uses of this product in wider transport planning.

Summary of methodology

The analysis employs precise polygon representations of roads and pavements to generate a centerline. At intervals of six meters—selected to balance data granularity with computational efficiency—transects are created perpendicular to the centerline (rotated 90 degrees). These transects are clipped to the road and pavement polygons to derive width attributes. Each transect is then assigned a classification based on a predefined red-amber-green (RAG) criteria.

Model Classifications

The pavement widths classifications are as follows:

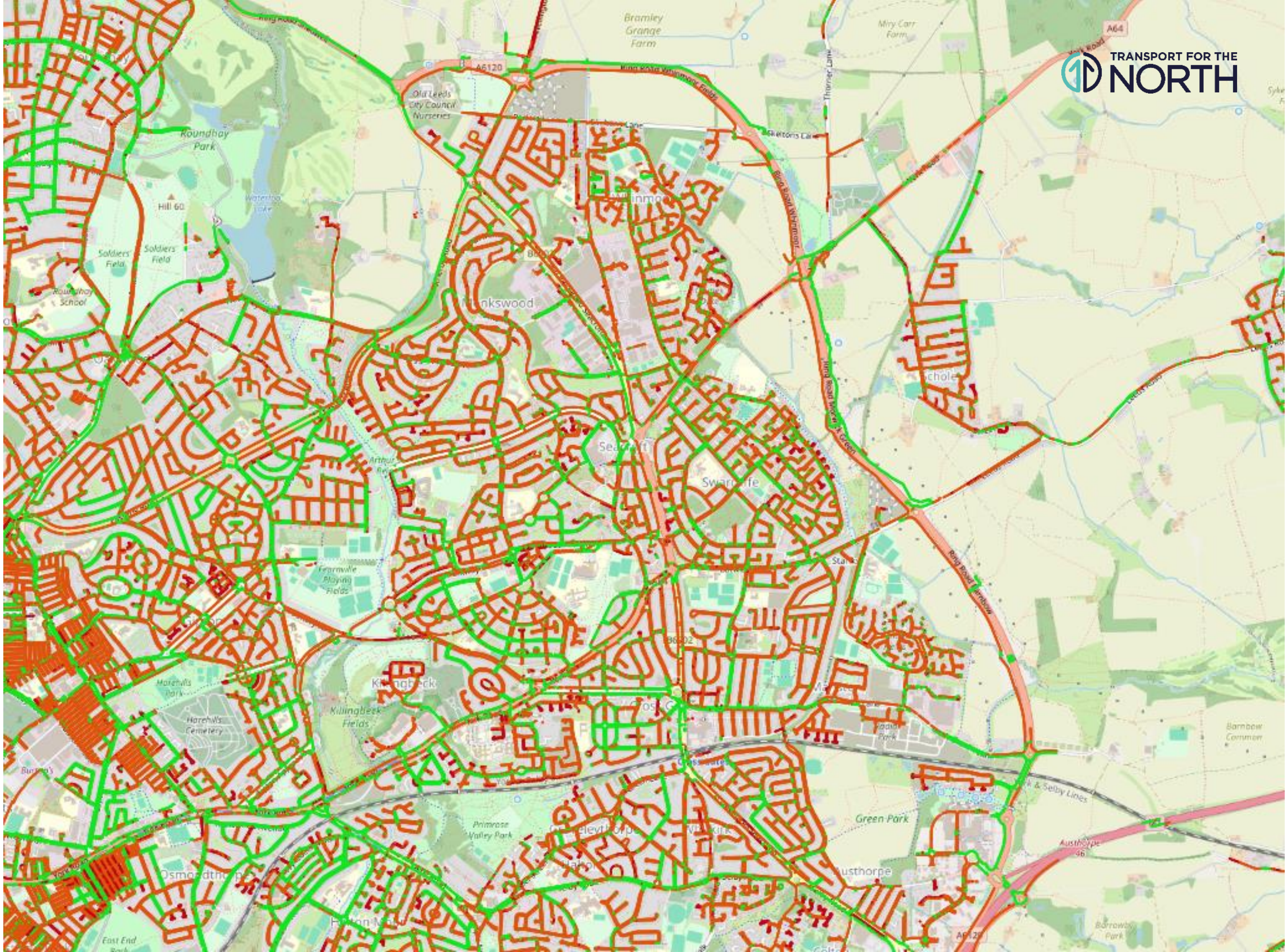
- Red: 0 to 1.8m
- Amber: 1.8 to 2.4m
- Green: 2.4m+

The road width classifications are as follows:

- Red : 0 to 6m
- Amber : 6 to 8m
- Green: 8m+

Pavement and Road widths

Pavement and Road Width data under the assigned RAG criteria



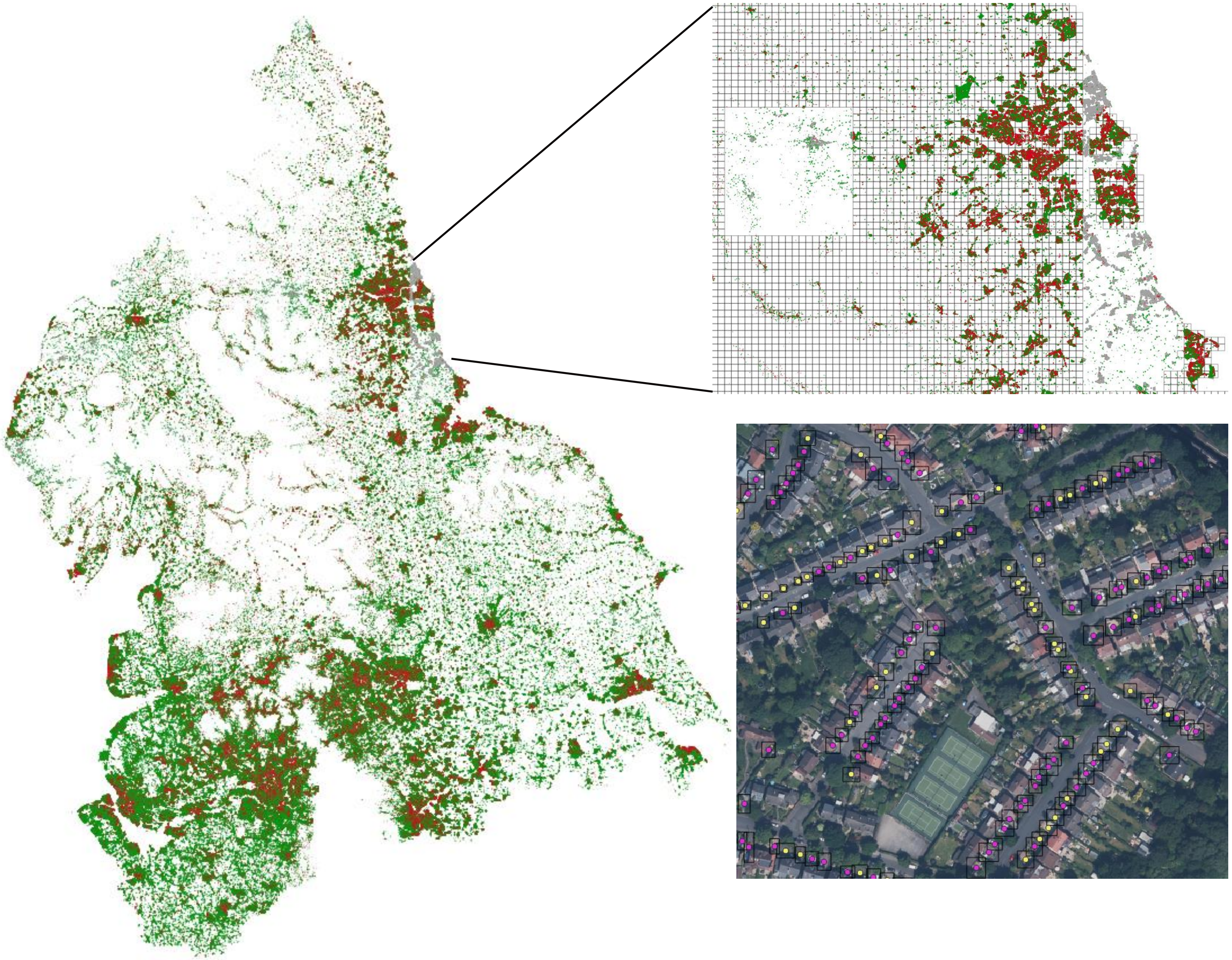
Contents

Driveway Detection

TfN, working with Ordnance Survey, have developed and trained a model using aerial photography to detect driveway availability of registered residencies.

By overlaying imagery to OS residency boundaries, a trained model can classify whether a residency has an available driveway, suitable for use in home charging, and whether a car is stored visibly on the driveway. Model accuracy is approximately 90% for correct identifications.

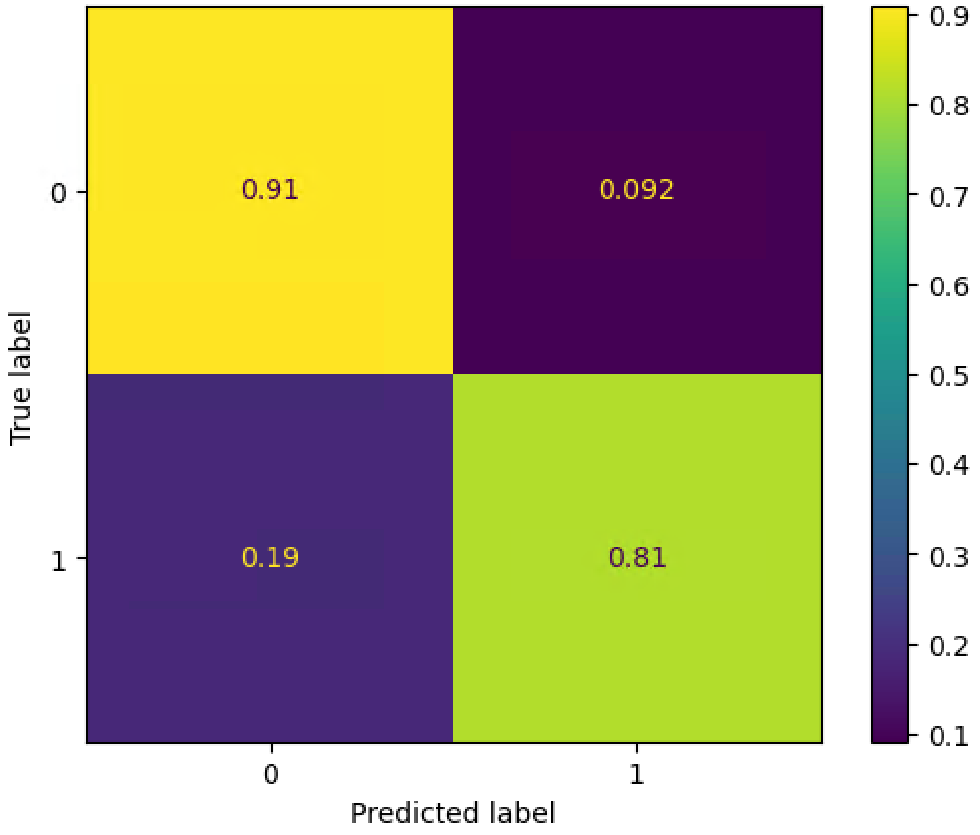
In addition to being offered as supplementary data to TfN partners, driveway data is also used within the EVCI core model to determine home charging availability.



Driveway Detection Modelling Accuracy

Actual \ Predicted	No Driveway	Driveway
No Driveway	**True Negative** There is not a driveway and the model does not identify a driveway	**False Positive** There is not a driveway, but the model identifies a driveway
Driveway	**False Negative** There is a driveway, but the model does not identify a driveway	**True Positive** There is a driveway and the model identifies a driveway

```
Accuracy: 0.8562525965932696
Precision: 0.916243654822335
Recall: 0.8142857142857143
F1: 0.8622611464968153
```



Driveways version 2 2024

TRANSPORT FOR THE NORTH

- **Coverage upgrade** – filling gaps with latest aerial photography

- **Quality of product increase**:
  - Increased model detection training – more manual labelling to improve resilience.
  - Overall quality of model detection remains similar to version 1 (~90%).
  - Rural area and terrace quality increase
  - Model process improvements

- **Additional usability at point of use**:
  - OSID, UPRN and postcode linked outputs
  - 'Yes' or 'No' driveways
  - Detail of residential type – shared building references etc

- **National roll out** – across England

Contents

Charging behavioural updates

Description of Updates

The EVCI Model uses a set of behavioural assumptions in its calculation of future charging demand and infrastructure, including:

- charging session duration,
- charger daily usage.
- charger hourly usage profiles

The original numerical representation for each of these in the model was adapted from ERM research and the ICCT 2020 publication on quantifying the charging gap.

Following a review in 2025, it was determined the significant expansion of charging infrastructure may have resulted in behavioural changes as deployment and infrastructure users increased in scale.

The behavioural assumptions were replaced with detailed monitoring data from monthly ZapMap reporting. Forecasted yearly progression in behavioural data was scaled according to changes in actual usage according to the new data.

Assumptions, Risks and Limitations

There are three major assumptions associated with the method, each carrying their own risk and limitations:

- ZapMap assigns data to geospatial tiles, tiles below a certain charger density are anonymised to prevent precise charger identification. If charger density corresponds to different area classifications (urban/rural, high/low income, ect.) then anonymisation may skew the calculable data towards the behavioural profiles of those areas with a higher charger density.
- It is assumed a decline of charger usage of a particular category carries over proportionally into its projection. For instance, if in the ZapMap data destination charging is more popular and work charging less so, these will also be assumed to be truthful of their projections.
- Hourly usage profiles are scaled using an amplification function which preserves their normalised probability distribution. Scaling is done to prevent the compounding of charger queuing as a preferred charging need. The original ERM data anticipates strong peaks in its charging categories For instance, the original data anticipates users wishing to use public residential charging at 5-6pm while the ZapMap reporting indicates a smaller peak with a significant portion of users charging at midnight, this is assumed to represent a bottleneck of available chargers, rather than a desirable outcome.

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Charging behavioural Updates – Translation of categories

The EVCI model uses 7 distinct charging categories, of which 2-4 are reflected in the ZapMap data and behavioural updates:

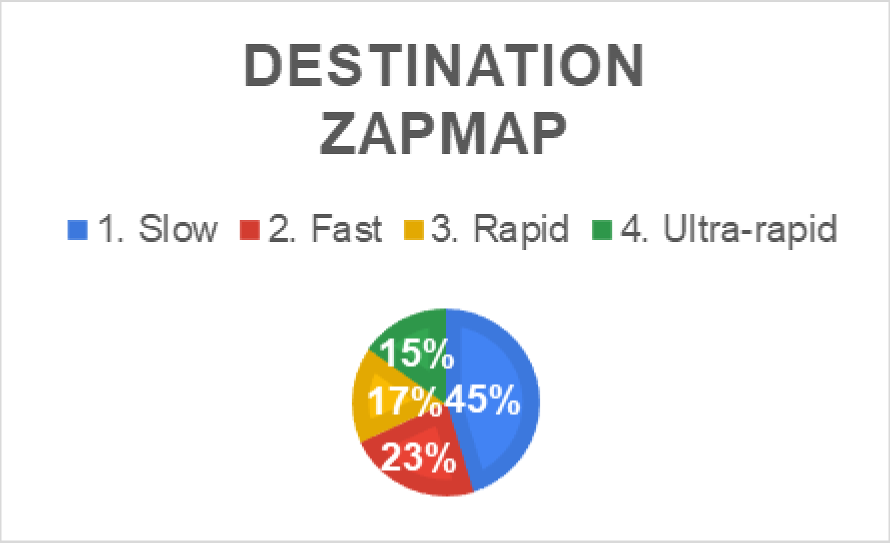
1. Home
2. Workplace
3. Destination
4. Public Residential
5. Rapid Enroute
6. HGV Depot
7. HGV Rapid Enroute

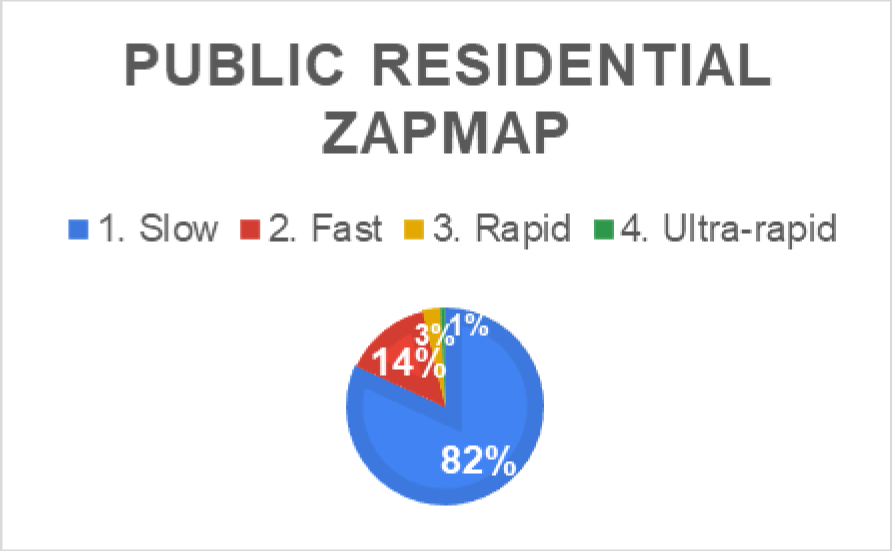
ZapMap data records 17 different charging categories (excluding 'All'). Consequently, a translation of categories is required to align the raw data with the processing methodology – see the right-hand table. Destination is the most numerous assignment of all categories, with the most diversity of user purposes.

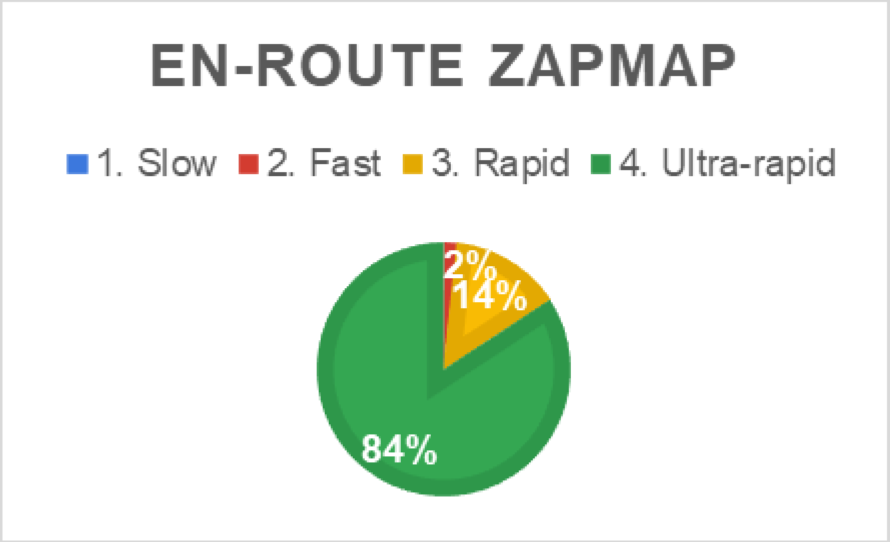
ZapMap Category	EVCI Category
Accommodation	Destination
All	Destination
Car Park	Destination
Dealership	Destination
Education	Destination
Fuel Forecourt	En-route
Leisure	Destination
On-Street	Public Residential
Other	Destination
Park and Ride	Destination
Retail Car Park	Destination
Supermarket	Destination
Travel Interchange	Destination
Workplace Car Park	Work
Health Services	Destination
Public Services	Destination
Restaurant/Pub/Cafe	Destination
Motorway Services	En-route

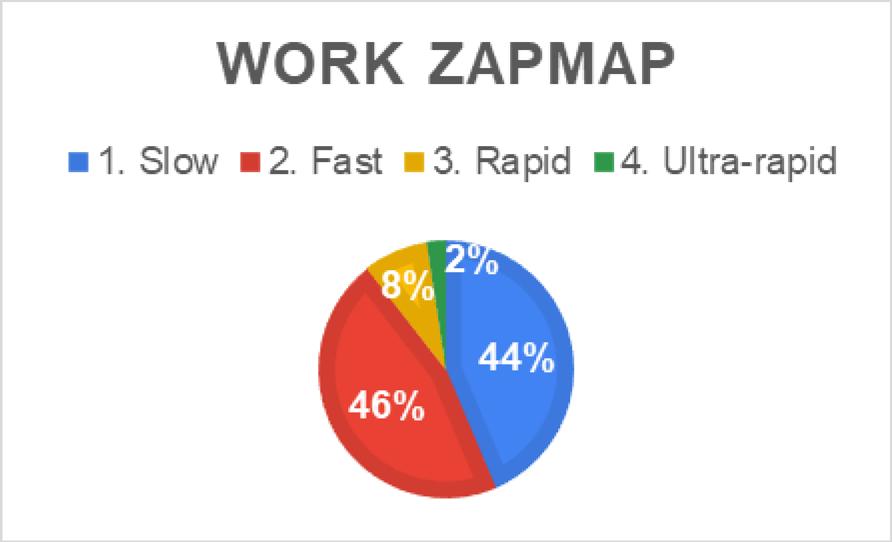
Charging behavioural Updates – Power usage across category

The EVCI model assumes 8kW powers for Destination, Public Residential and Work chargers, and 44kW-150kW for En-Route. The right-hand-side diagrams demonstrate how these assumptions compare to the ZapMap data. While Public Residential and En-Route chargers appear generally consistent with their model assumptions, Destination charging contains a high variance across power category. This may be the result of the diversity of ZapMap categories which constitute a Destination designation in the TfN model.







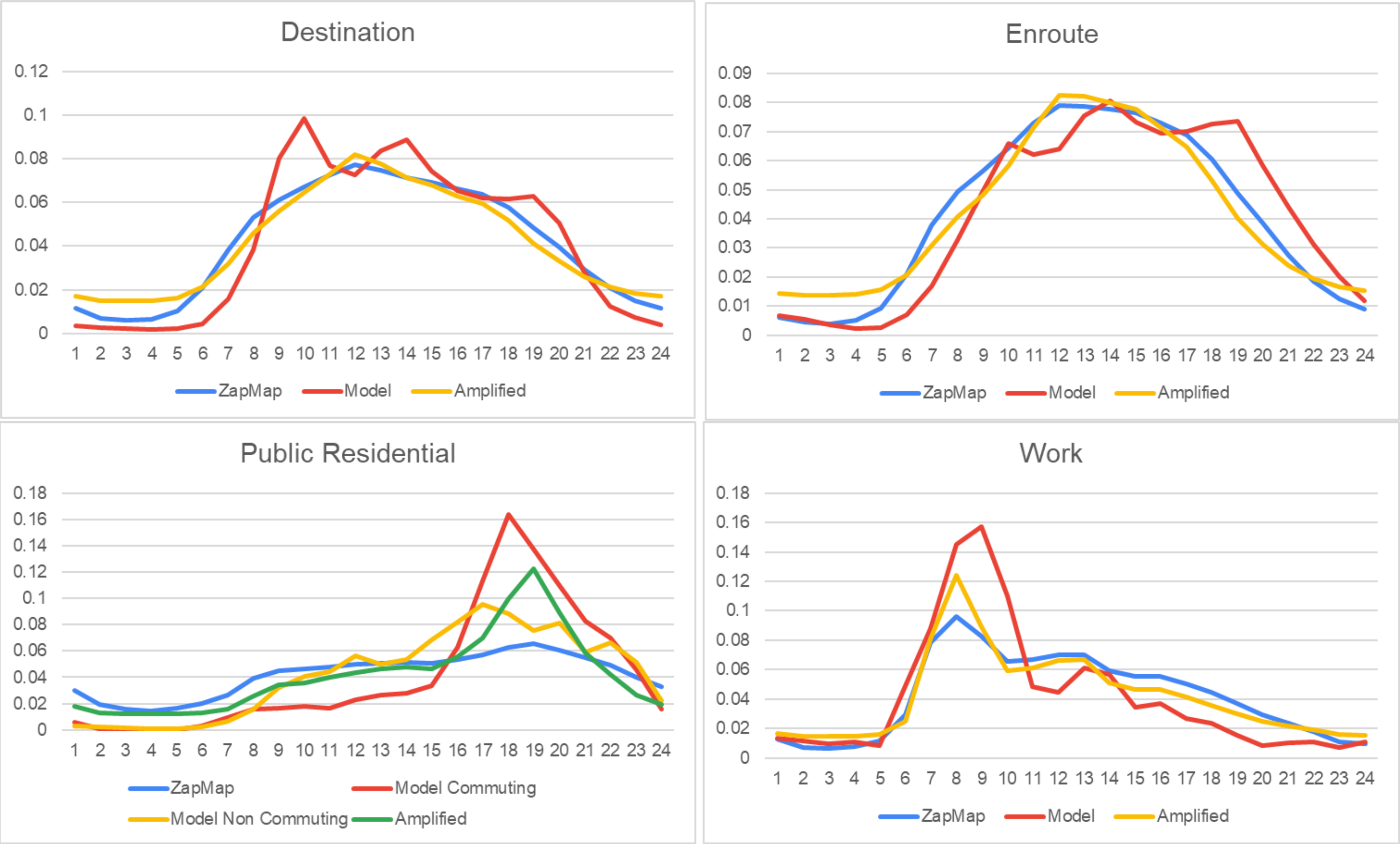


Charging behavioural updates – Hourly usage profiles

ZapMap: Existing hourly usage profiles by category according to the available recorded ZapMap data.

Model: Model data prior to September 2025, matching the original EE database.

Scaled: ZapMap data amplified to account for real-world inbuilt queuing.



Charging behavioural impacts - charging need reduction

- Updated EVCI demand and behavioural parameters: based on latest zap map utilisation insights. Three behavioural datasets targeted have contributed to lower charging projection outcomes:

  - **Charging session duration** – Zap Map data suggests user charging sessions across categories are typically 20-50% shorter than previously estimated. Likely reflecting increasing power output of chargers. Consequently, the same charger appears available again for the next user sooner than the model previously anticipated.

  - **Daily Charger usage** – Data updates suggests public residential and enroute chargers have increased in their average daily usage. The same charger is used more throughout the day than previously estimated, and consequently, one charger now covers more of the total EV energy demand in its area.

  - **Hourly usage profiles** – have remained broadly similar, however peak usage points have generally narrowed in width across categories. This means more chargers are available prior to the peak to satisfy the increased user demand.

- **Application of latest driveways access data** - increases home charging generally across the EVCI Framework (reduces public charging needs).

Lower EVCI demand in the EVCI Framework, but outcomes remain higher than other tools such as CENEX's NEVIS.

TfN

	2030	2050
JAM	93,455	274,356
MM	120,416	248,829

NEVIS

	2030	2050
Blend, Mid EV Uptake	19,637	72,604
Blend, High EV uptake	20,616	72,613
Residential, Mid EV uptake	40,810	202,980
Residential, High EV uptake	43,013	203,017

Contents

Rapid Charging Network Model

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Tool Overview

The EVCI Rapid Charging Network model is designed to forecast en-route charging demand along the road network. It produces forecast annual demand (kWh)/number of charging units based on the likelihood of vehicles stopping to charge on segments of the road network.

High-Level Description of Methodology

The model utilises vehicle-kilometre (VKM) skim data to calculate annualised VKM for each road segment (link). This is achieved by multiplying the segment length by absolute demand and applying annualisation factors.
Charging probability for each link is then determined based on route distance, calculated separately for each user class, time period, and route. For each route, these probabilities are distributed across the network and normalised for each origin-destination (OD) pair.

Subsequently, the rapid en-route demand data generated by the EVCI model (refer to page 14 of this report for a high-level overview) is allocated across these normalised, weighted links using OD pairs. This process produces annual demand. Estimated charging units for the road network are calculated using:

$$\frac{\left(\frac{Annual\ charging\ demand}{hours\ of\ utilisation\ per\ day * 365}\right)}{kW\ power\ output\ of\ the\ charger}$$

Finally, the number of charging stops is derived by dividing the annualised demand by 100, based on the assumption that an electric vehicle can travel approximately 100 km before requiring a recharge.

Rapid Charging Network Calculation Methodology

The rapid charging methodology utilises a different probability distribution based on route length.

Short-Distance Trips

Assuming that electric vehicles (EVs) require recharging after traveling 100 km, trips shorter than this distance are classified as short trips. For these trips, the following probability distribution is applied to each link:

$$\frac{route\ distance}{100} * \left[\frac{link\ length}{route\ distance}\right] * absolute\ demand$$

Long Distance Trips

For trips longer than 100 km, the probability of charging is distributed across predefined distance intervals (every 20 km starting at 60 km). The distribution follows a weighted pattern, with higher probabilities concentrated around midpoints and lower probabilities at the extremes as the route distances are categorised into multiple bands. As trip length increases, additional intervals are added while maintaining the same proportional pattern.

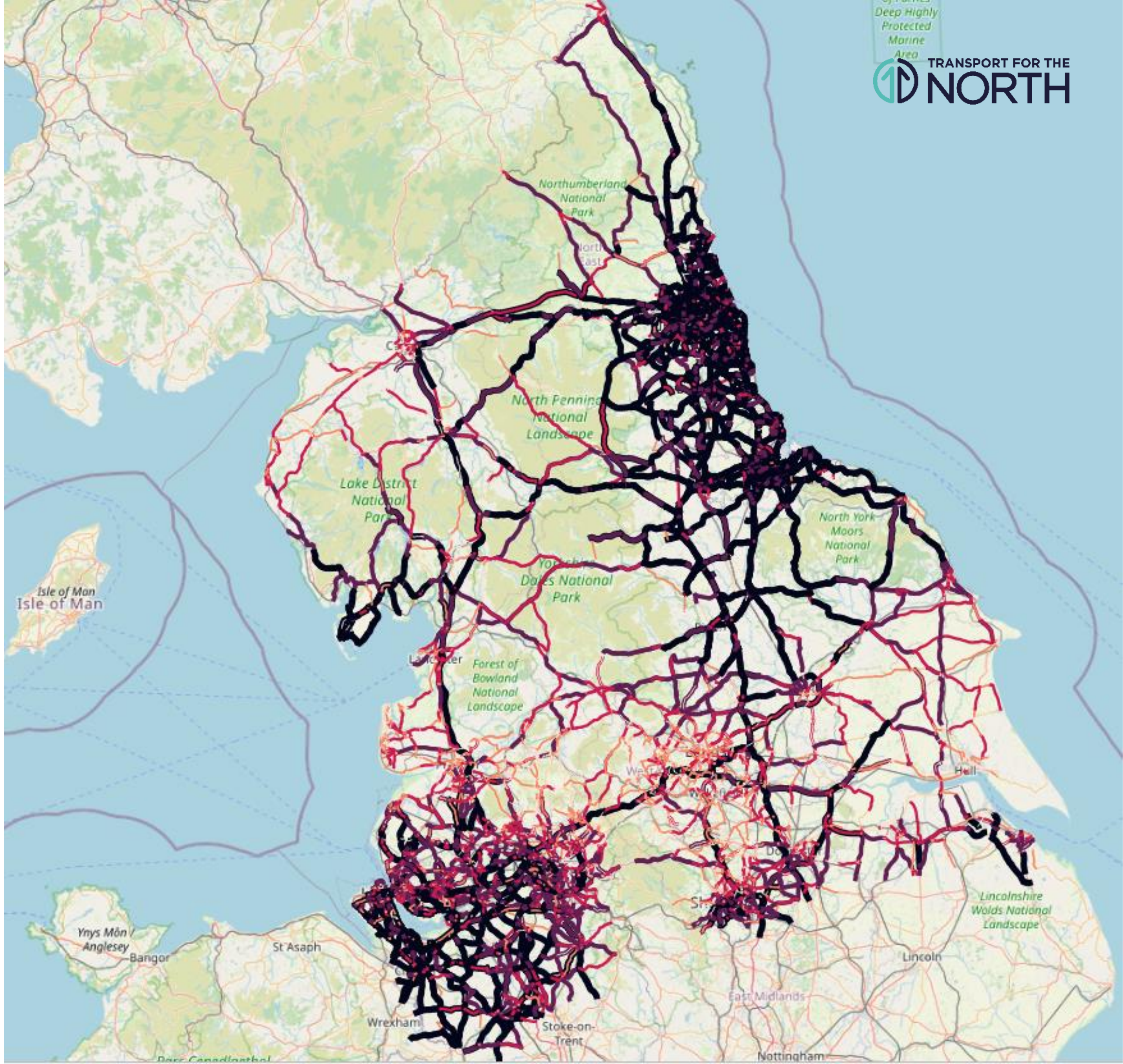
Rapid Charging Network Outputs

Results are produced for individual annual stop count, energy demand, and rapid charger count associated with each NoHAM link.

Results are segmented according to electric vehicle classification by car, LGV and HGV.

Results can be kept according to network link or aggregated onto intersecting MSOAs.

Right: Heat Map of LGV-Generated Annual Enroute Charging Demand in 2030



Contents

EVCI Site Suitability Tool

High-Level Description of Tool

The EVCI Site Suitability Tool brings together many existing data layers and produces several new layers, which it weights and combines according to the tool-user's preference. TfN can customise EVCI Framework data to provide weighted assessments to support TfN constituent authority strategies, needs and investment plans. Iterative development and refinement is available to help partners explore options.

The current possible layers are OS road network, MSOA EV demand, MSOA driveway count, pavement widths, road widths, lampposts, bus lanes, existing charging infrastructure, walking catchment areas, energy headroom data, commercial viability, Social deprivation, vulnerability and accessibility scores.

TfN is able to work with its constituent authorities to apply local data sets to this exercise. i.e. TROs, highways adoption, land ownership, spatial development data.

Assumptions, Risks and Limitations

This product has been developed to maximise TfNs EVCI toolkits for the benefit of TfN constituent authorities. Outputs of this product are to be used as advice and information only and do not represent delivery decisions made by public authorities or other entities. Further specific site investigation and development work is advised for any locations of interest before making investment and delivery decisions.

Output delivered as –

- GeoPackage/Shapefile/CSV/ GIS output which contains a suitability score for each 100 metre squared grid across the locality.
- Focused on areas less than 0.5km from the road network.

Tailored site identification support – process

- Submit request using ‘TfN Offer’ quick **online form**
- Scoping and clarification of partner needs to agree parameters and inputs
- TfN share outputs and review with partner
- TfN make any refinements or run additional assessments
- Handover outputs, supporting documents and ongoing support were needed.