



THE ASSOCIATION
FOR RENEWABLE ENERGY
& CLEAN TECHNOLOGY

COVID and e-Mobility:

how will the virus impact the green mobility agenda in the UK and Europe?

18th June 2020, 10:30am

Part 2 of the REA's annual EV Experience conference



Sample of
REA EV
Forum
Members



Agenda

Presentations from:

- **Dean Hedger, New Business Development Manager at The AA**
 - *on how COVID will impact driving and purchasing patterns in the future.*
- **Christoph Domke, Senior Director at FTI Consulting**
 - *on the recently released national and EU-level green recovery packages.*

Followed by comment and discussion with:

- **Fiona Howarth, Chief Executive at Octopus Electric Vehicles**
- **Sam Clarke, Chief Vehicle Electrification Officer at Griderve**
- **Robert Llewellyn, Presenter at the Fully Charged Show**

Chair: Daniel Brown, Policy Manager & EV Lead at the REA



Presentation

Dean Hedger, New Business Development Manager at The AA

- *on how COVID will impact driving and purchasing patterns in the future.*



COVID-19, GREEN MOBILITY & THE NEXT STEPS FOR EV

Dean Hedger

*EV New Business
Development Manager*

AA



THEMES

- Post-lockdown transport patterns
- EV demand
- EV myths & opportunities
- CX innovation
- What next?

TRANSPORT PATTERNS



- ▶ People have enjoyed quieter streets and cleaner air so more may opt for electric cars, cycles, e-bikes and scooters after lockdown
- ▶ Four fifths of drivers (82%) will take action to maintain cleaner air after lockdown
 - Half say they will walk more
 - Two fifths will drive less
 - One fifth (21%) will cycle more
 - Around one fifth (18%) will buy an EV
 - A similar number (17%) will buy hybrid



EVS, THE UK MARKET & THE AA



EVs in the UK Market

- ▶ There are almost 300,000 electric cars and vans operating on UK roads
- ▶ EV variants across all types of model and body style, with a large range of brands and classes now available
- ▶ EV car sales haven't suffered same sharp drop as conventional; cumulative 2020 market share for BEV+PHEV is 7.2%
- ▶ BiK was removed from BEVs from 6 Apr 2020, boosting demand

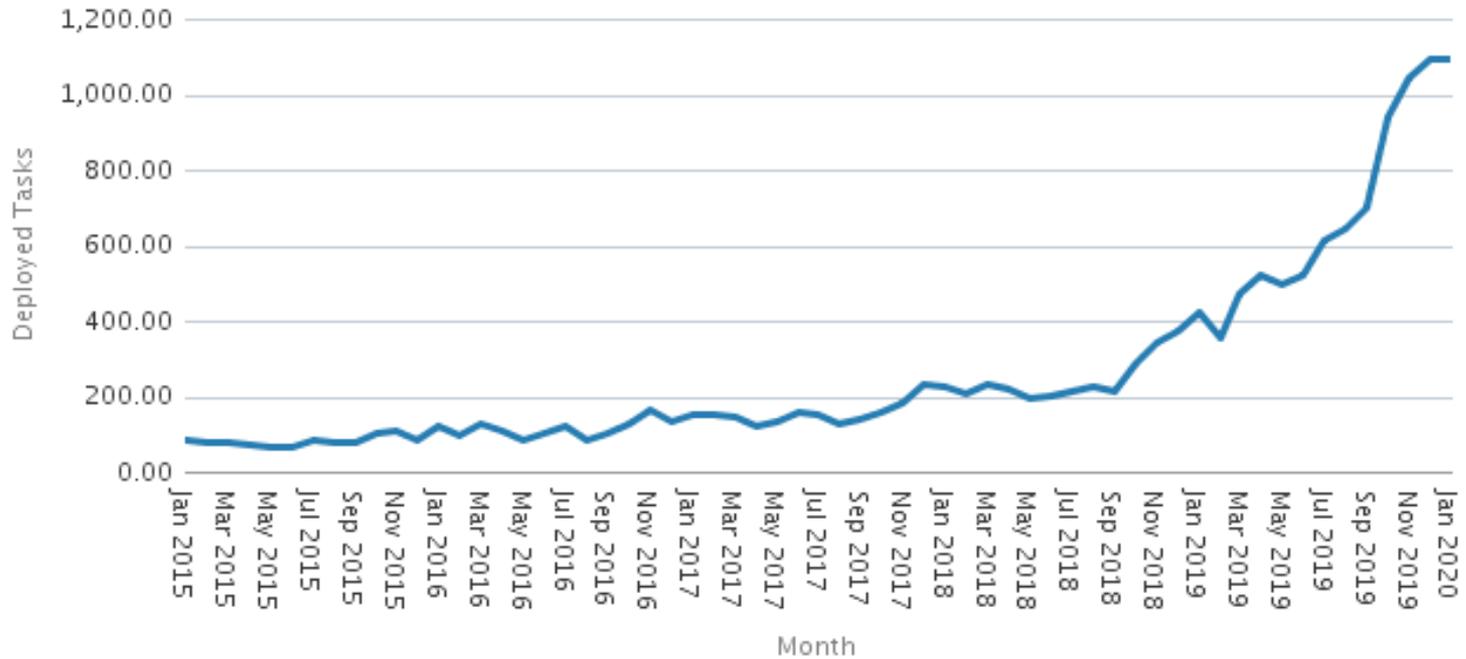
EVs and the AA roadmap

- ▶ We believe organisations should invest in EV and other future fuels – so long as the investment stacks up
- ▶ We agree charging infrastructure deployment should be rapidly accelerated
- ▶ We feel it should be easier for fleets and businesses to buy EV and other future fuels – product, infrastructure, finance, advice
- ▶ We believe we have a role to help businesses and fleets on this journey

EV BREAKDOWNS



Deployed Tasks



EV VS. ICE BREAKDOWNS



Tyres will always be an issue

- ▶ Tyres and 12V battery similar to total breakdown stats (29%)
- ▶ Tyres will continue to be an issue due to lack of spare wheels and weight in an EV
- ▶ HV battery out of charge (4.5% of all jobs) is similar to running out of petrol/diesel (1.1%) but more prevalent!

Fault Type	% Total breakdowns
Tyres	16.5%
12v Battery*	12.4%
Charging equipment	4.9%
Out of charge	4.5%
HV Battery fault	4.3%
All other HV faults	5.4%

EV BREAKDOWNS BY GEOGRAPHY



- ▶ Driven by Government legislation on emissions – CAZs, ULEZs and so on
- ▶ Which drives investment in infrastructure i.e. more charging points in cities
- ▶ How we use this data? To forecast future car parc changes and prioritise training
- ▶ Our approach: An EV capability which is ready to scale in line with UK EV growth

Location	EV breakdowns	All breakdowns
London	29%	18%
Birmingham	2%	7%
Manchester	2%	5%
Edinburgh & Glasgow	2%	5%

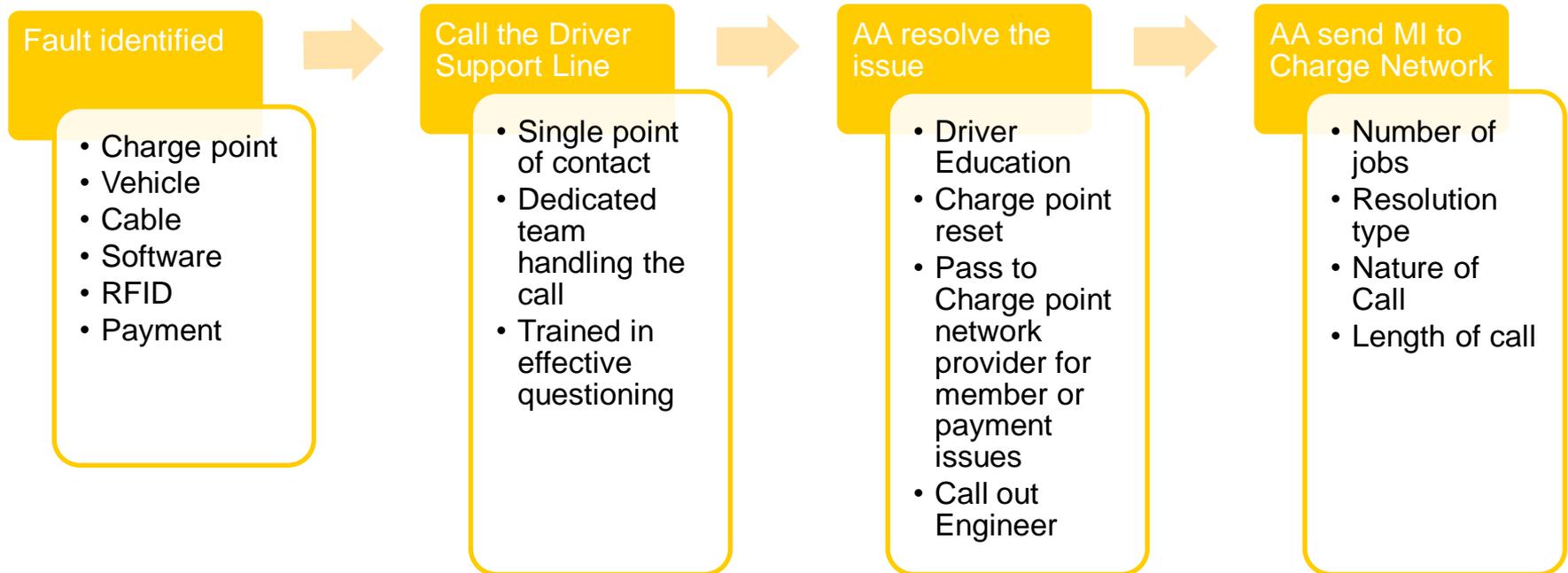
WHAT'S HAPPENING NOW?



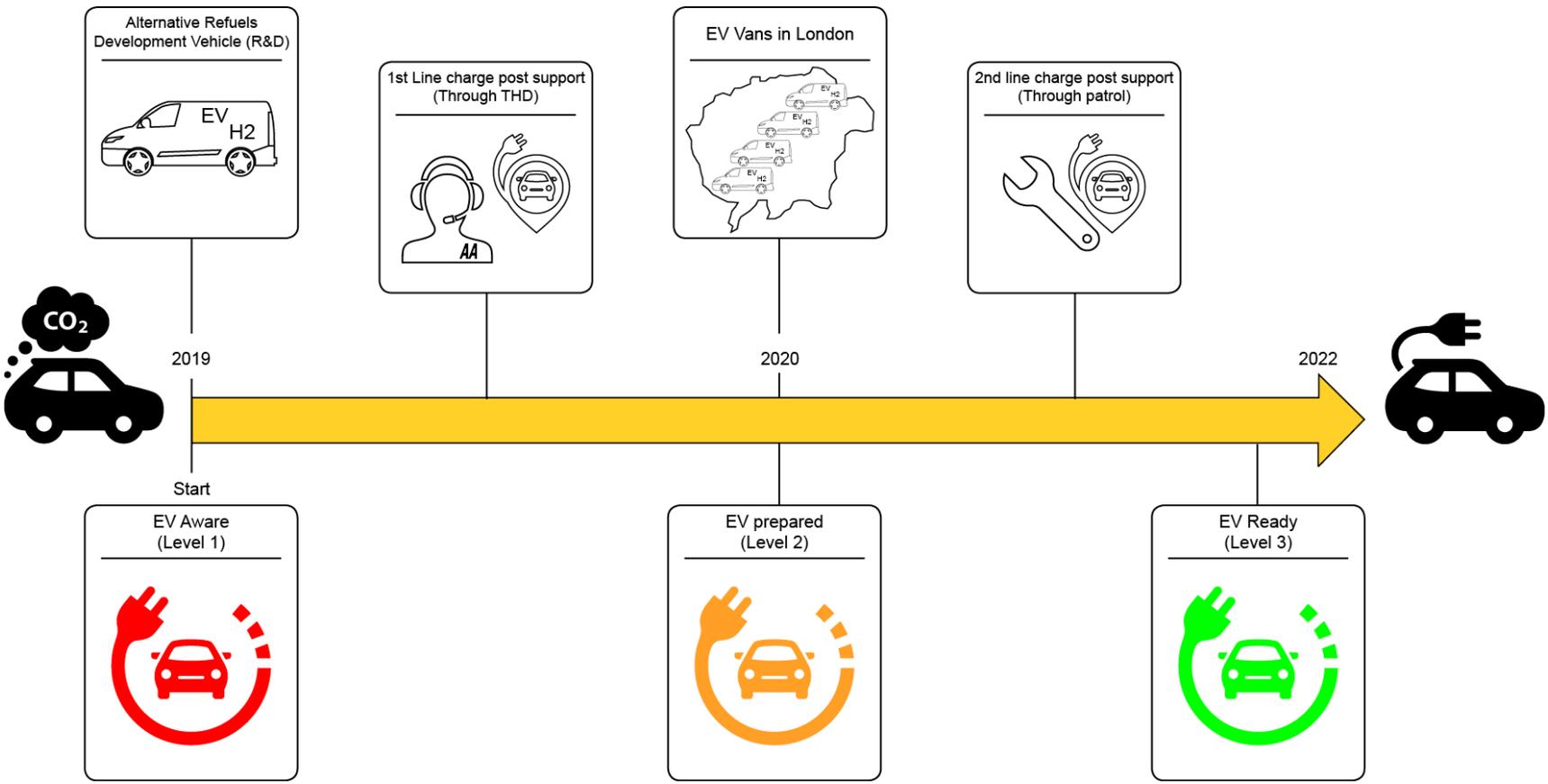
- ▶ Training – all patrols to complete training (mapped to IMI Level 2) in 2020
- ▶ Investment in technology and equipment including specialist EV gloves and new tablets with thermal imaging cameras
- ▶ Responding to market demand and developing our strategy to scale in line with industry requirements



ELECTRIC VEHICLE CHARGE POINT SUPPORT



OUR FUTURE FOCUS...



THANK YOU

Presentation

Christoph Domke, Senior Director at FTI Consulting

- *on the recently released national and EU-level green recovery packages.*





FTI CONSULTING

Covid-19 and e-Mobility

How will the virus impact the green mobility agenda in the UK and Europe?

Christoph Domke
Senior Director - Clean and Smart Mobility
FTI Consulting



COVID-19

Who are the major winners in mobility, amid/post Covid-19?

Electrification



E-Commerce



**Autonomous
Cargo**



**Private
Micromobility**



**Vehicle
Ownership**



COVID-19

Who are the major losers in mobility, amid/post Covid-19?

Car Rental
Firms



Autonomous
Driving
(Passenger)



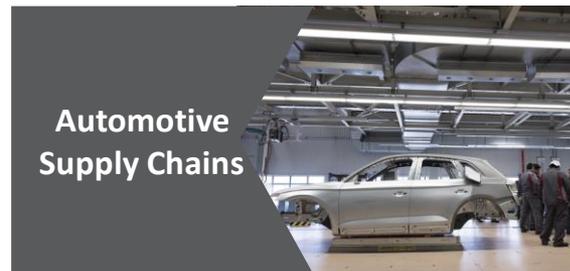
Public Transit



Ridesharing

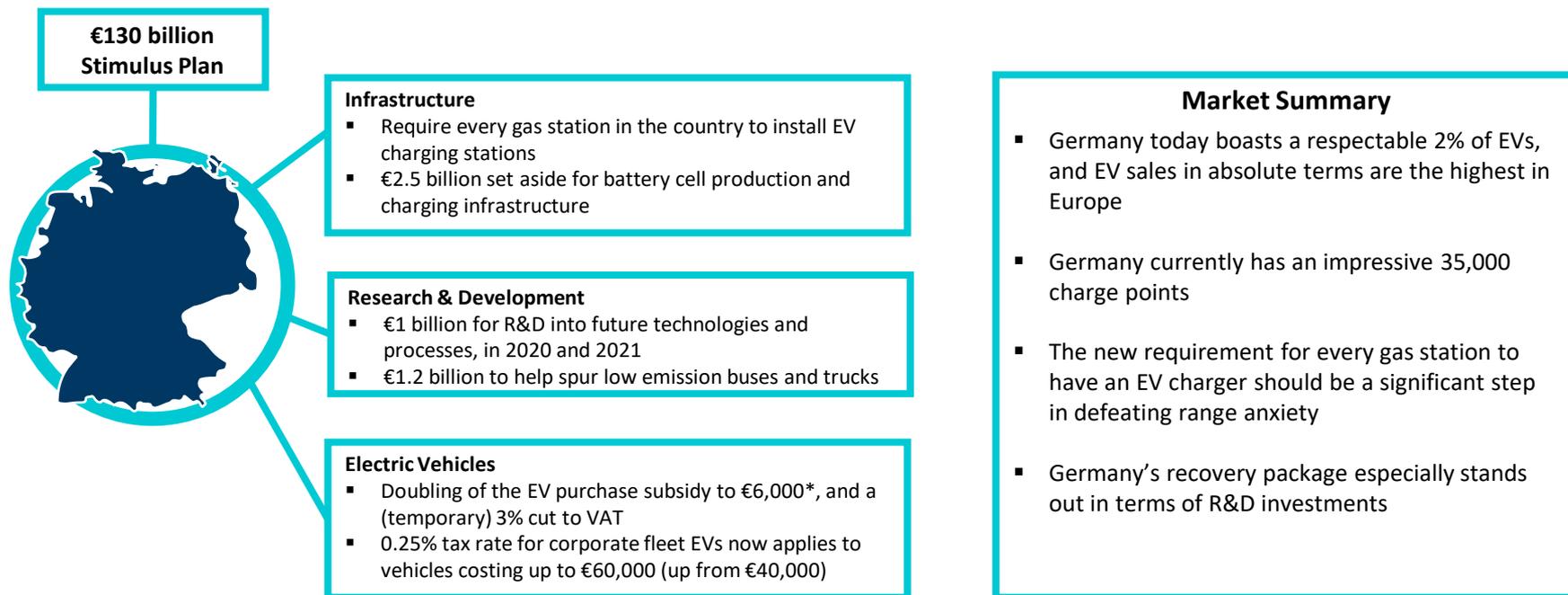


Automotive
Supply Chains



FIND OUT MORE

Germany has a comprehensive recovery plan, that invests significant amounts in R&D, infrastructure and EV purchase subsidies

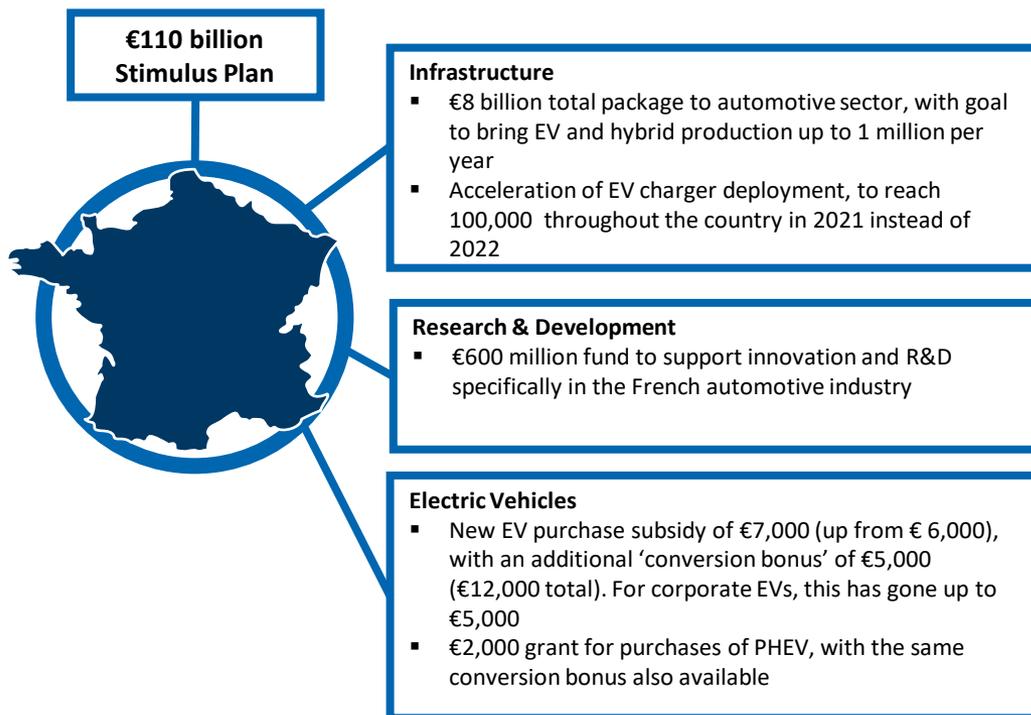


*For vehicles costing less than €40,000

Sources: ACEA, SMMT, KBA, Avere-France, IEA

FIND OUT MORE

France's Recovery Package is ambitious, and focuses on significant EV purchase subsidies



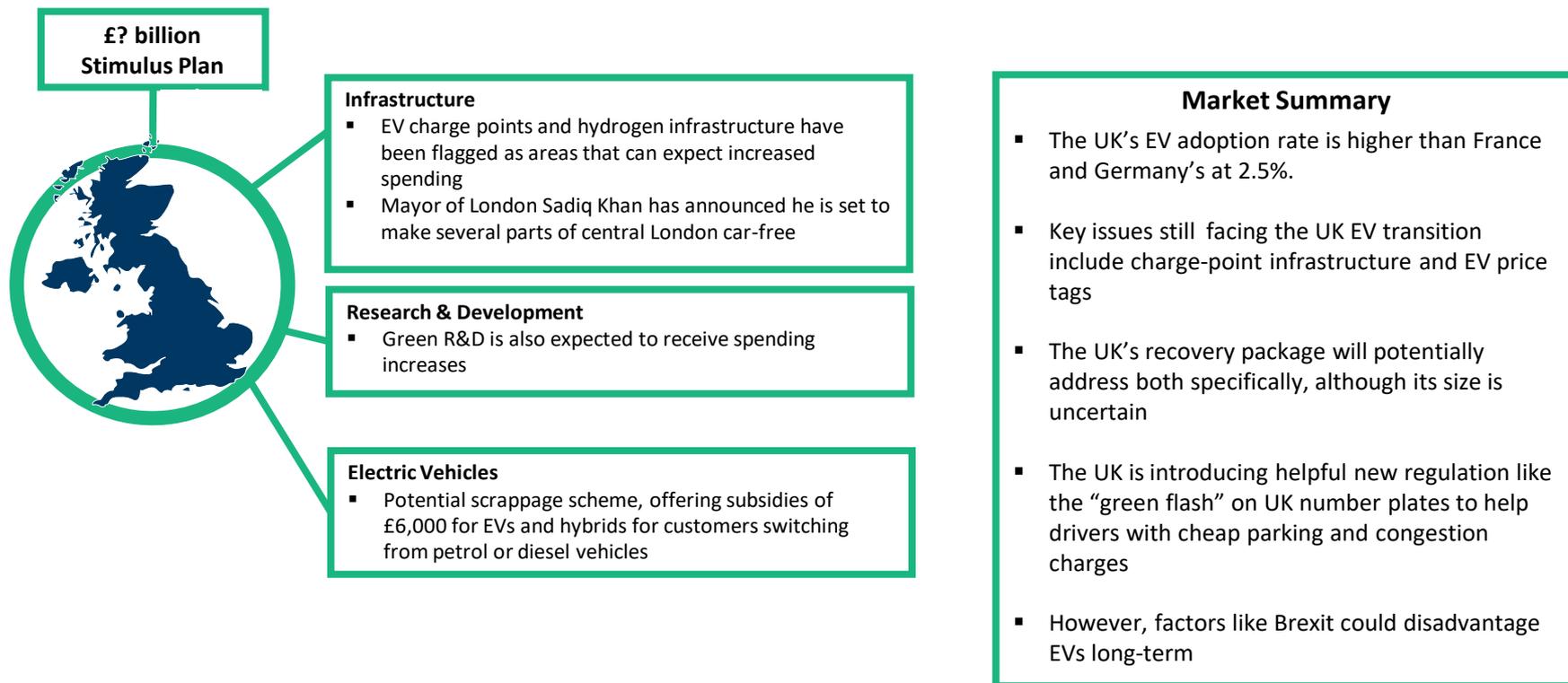
Market Summary

- France's EV transition is on-par with with a 2.1% EV adoption rate
- France has a decent 30,000 charge points, but this is quite low in terms of area density
- France's Covid-19 recovery packages have an ambitious goal of 100,000 charge points by 2021
- In addition, its new purchase subsidies are almost twice their German counterparts
- The French EV market has proved very resilient, with plug-in sales reaching almost 12% of all cars in March, (UK: 7%, Germany: 9%)
- As a result, France is already seeing the early signs of an EV boom

Sources: ACEA, SMMT, KBA, Avere-France, IEA

FIND OUT MORE

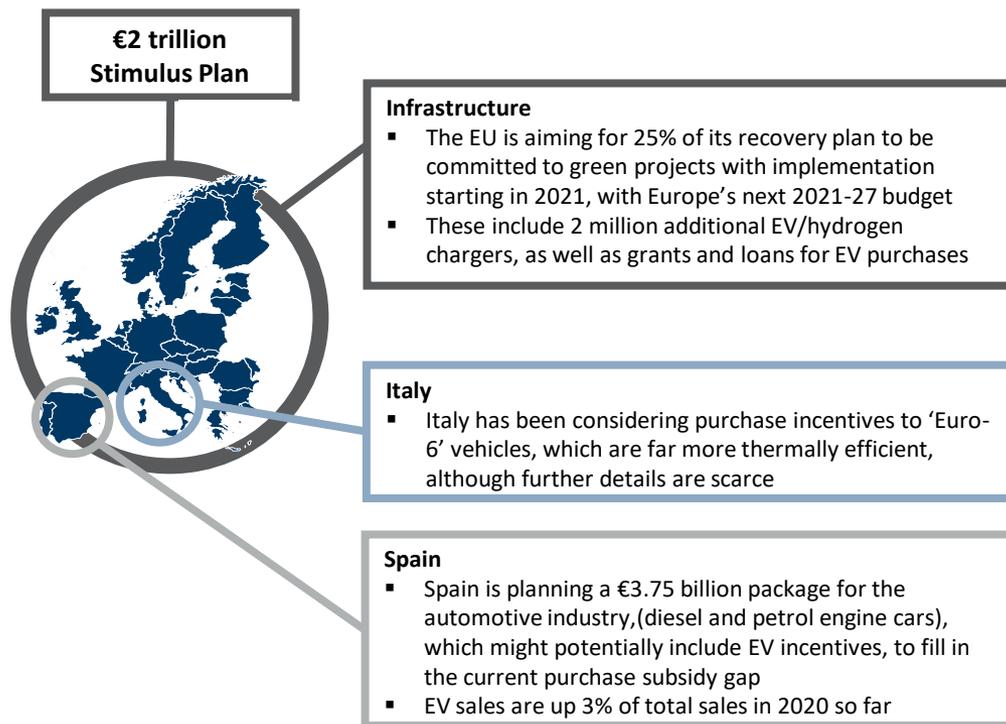
The United Kingdom's recovery package is still unannounced, but its recovery is fragile



Sources: ACEA, SMMT, KBA, Avere-France, IEA

FIND OUT MORE

The EU itself has announced a green recovery package



Sources: ACEA, SMMT, KBA, Avere-France, IEA

Market Summary

- EV numbers have doubled as a percentage of total sales in the EU in 2020, in the wake of Covid-19
- Private investment in EVs in Europe outpaced China's in 2019, at over €60 billion
- An EU directive dictates fleet-wide carbon footprints should average 95g per km by 2021
- The EU plans significant investment for its next budget, including EV chargers and purchasing grants and loans
- However, automotive lobbies have been petitioning the EU for a reprieve in its CO2 standards for carmakers after the impacts of Covid-19

Conclusions



- Covid-19 has had an overall positive impact on electrification Europe, although some consequences are hard to assess



- Germany and especially France have implemented ambitious EV-friendly recovery packages



- The UK might see a more fragile recovery due to external factors such as Brexit, although details of its recovery package are not yet available



- The EU is becoming world's number one EV market, helped by tough regulations and generous subsidies



Experts with Impact™

REA work on COVID – 19 and eMobility

The REA's work in COVID & eMobility

- Regular cross-industry member updates relating to funding and safe working schemes
- EVSE maintenance staff as key workers
- Zap-Map survey on COVID & public charge point usage (April)
 - 98% of public EV charging network operational as before
 - 83% EV users still reliant on their EV for essential travel
 - 24% of respondents 'key workers'
- Current focus: grid connections for new charge points



Comments

- **Fiona Howarth**, Chief Executive at Octopus Electric Vehicles
- **Sam Clarke**, Chief Vehicle Electrification Officer at Griderve
- **Robert Llewellyn**, Presenter at the Fully Charged Show



Q&A

- **Open Q&A with attendees** – please enter your questions into the 'Questions' box on the GoToWebinar panel



Forthcoming Webinars

The future of payments for EV charging:

Debating how consumers and fleets will pay to charge their vehicles by 2030



6TH JULY 2020

11:00am – 12:30pm

Sponsored by 



#EVExperience2025

[BOOK NOW](#)

How do we stay relevant and compliant when engaging with stakeholders in the post-COVID recovery?

At this REA hosted event, we will bring together leading players from across the low carbon sector to discuss the ways in which development planning and community consultation for energy projects can be successfully managed in a socially distanced society.

 THE ASSOCIATION FOR RENEWABLE ENERGY & CLEAN TECHNOLOGY

10.30 – 11.30
Friday 10th
July 2020

Webinar
Please register for joining information


insight | communication | impact

Speakers Include:
Daniel Brown, Policy Manager, REA
Andrew Turner, Infrastructure lead, Madano
Patrick Robinson, Partner, Burges Salmon, Energy and Infrastructure practice



