



**DRIVE**  
ELECTRIC

# 9. STRATEGY REFRESH

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# Context – March 2019

## EV Industry

- Majority of brands now have EV on radar
- Widening of consumer offering to market 50/50 between PHEV and BEV however trending to BEV
- China is largest EV market in the world (but no right hand drive)
- Foreign markets less focused on EV utes however remains a gap in NZ
- NZ remains largely a technology taker and dependent on other market demand

## Cultural / Social

- Shared mobility becoming more interesting for consumers (i.e. Lime Scooters) and e-bikes.
- Normalising of e-mobility growing (intergenerational adoption)
- Range anxiety dropping off however cost continues to be a barrier (1<sup>st</sup> vehicle)
- Greater interest in mobility as a service for convenience/alleviation of congestions
- Growing interest in H<sub>2</sub> vehicles

# Context – March 2019

## Government / Policy

- Clear focus on emissions targets – Transport identified as an easy short term target for emissions mitigation
- Net Zero Carbon 2050 and Net Neutral Carbon 2035
- EECA LEVF continues with successful however no other material financial EV incentives in place.
- A lot of pressure on 64,000 target but the narrative has changed from number of vehicles to CO<sub>2</sub> emissions reduction by 20% on govt fleets.
- New policies in Health and Wellbeing / Energy Strategy (including Hydrogen Strategy) Housing and Urban Development (Affordable Living)
- Key ministerial focus – removing poor quality vehicles from market and lowering the cost of EVs

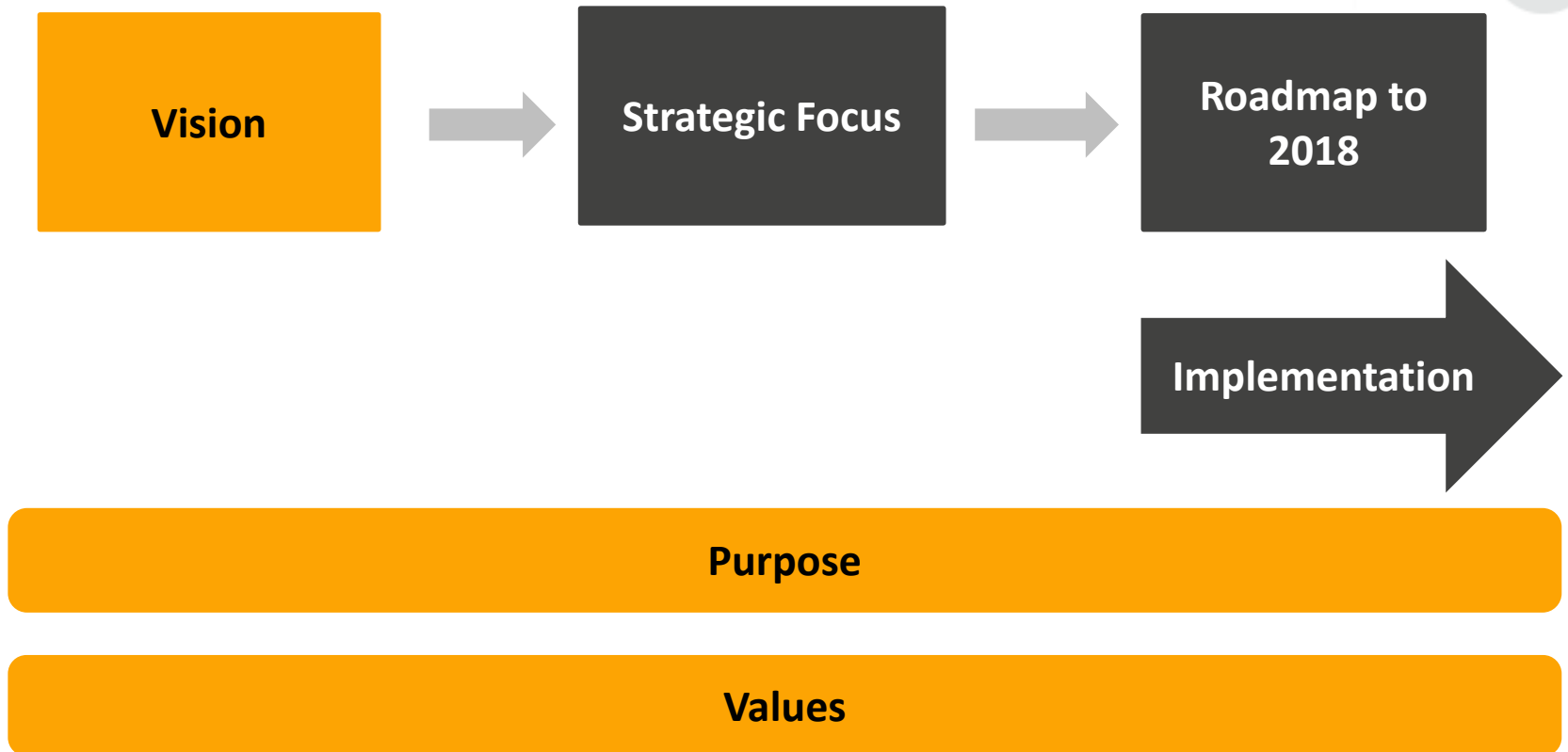
## Corporates

- Continue transition efforts – 30% fleet conversion targets

## Drive Electric

- Seen as a leader in the lobby space (albeit not intentionally)
- Website is the highest hit record via searches
- Over 12,000 website hits monthly – seen as the go-to repository of EVs in NZ.

# Overview



# Ideology

**Vision: *Mainstreaming e-mobility to support New Zealand's low-carbon future***

The EV Industry has grown significantly and Drive Electric has played a key role in that growth

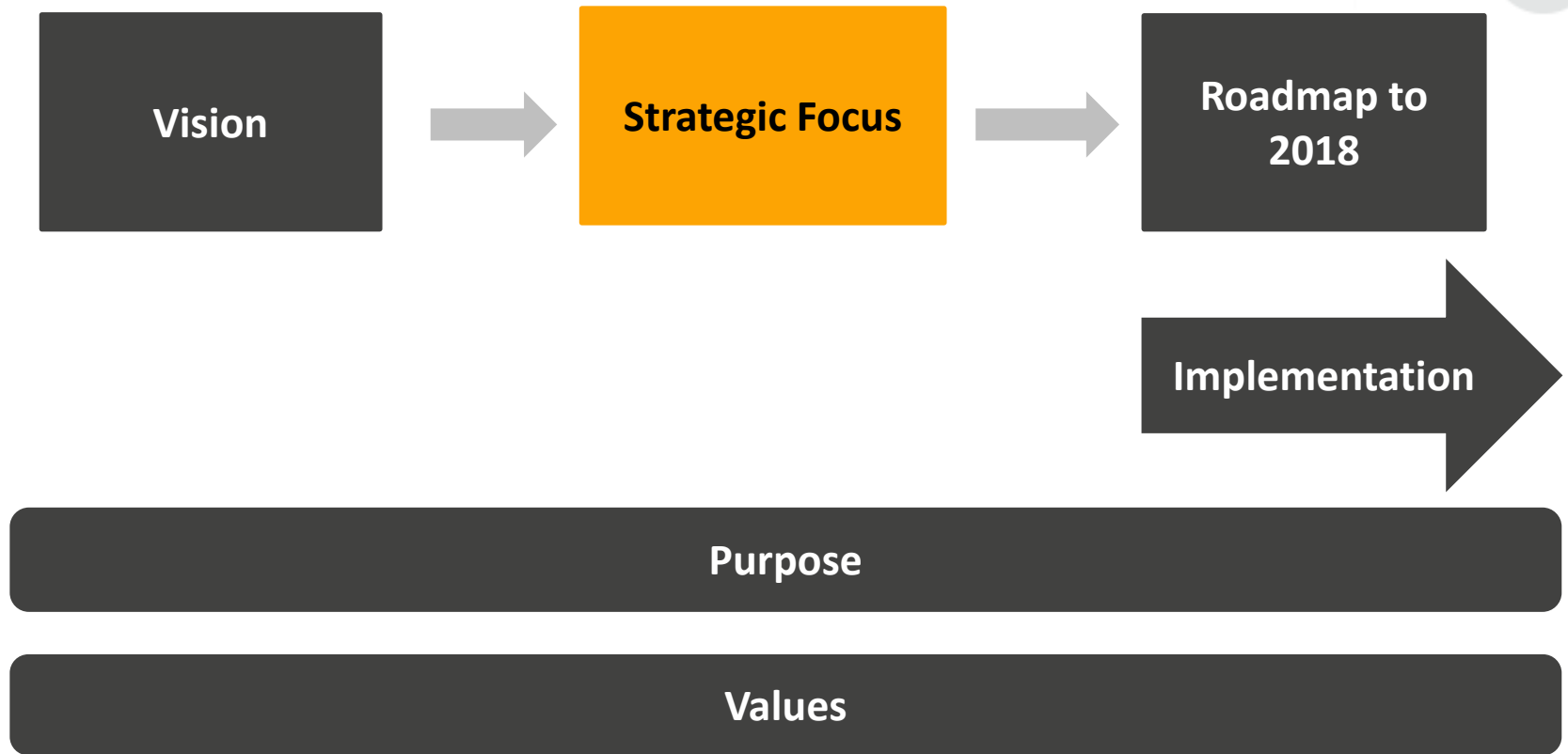
Drive Electric is the most credible and recognised go-to industry body for EVs in NZ

Drive Electric influenced policies that have accelerated EV uptake

**Current Purpose: *Mainstreaming electric transport***

**Values:** Enablers, Bold, Agile, Transparent, Best for New Zealand, Advocacy

# Overview



# Drive Electric – Strategic Focus Areas to 2024



# DE's Ability/Capability to Execute Pathways

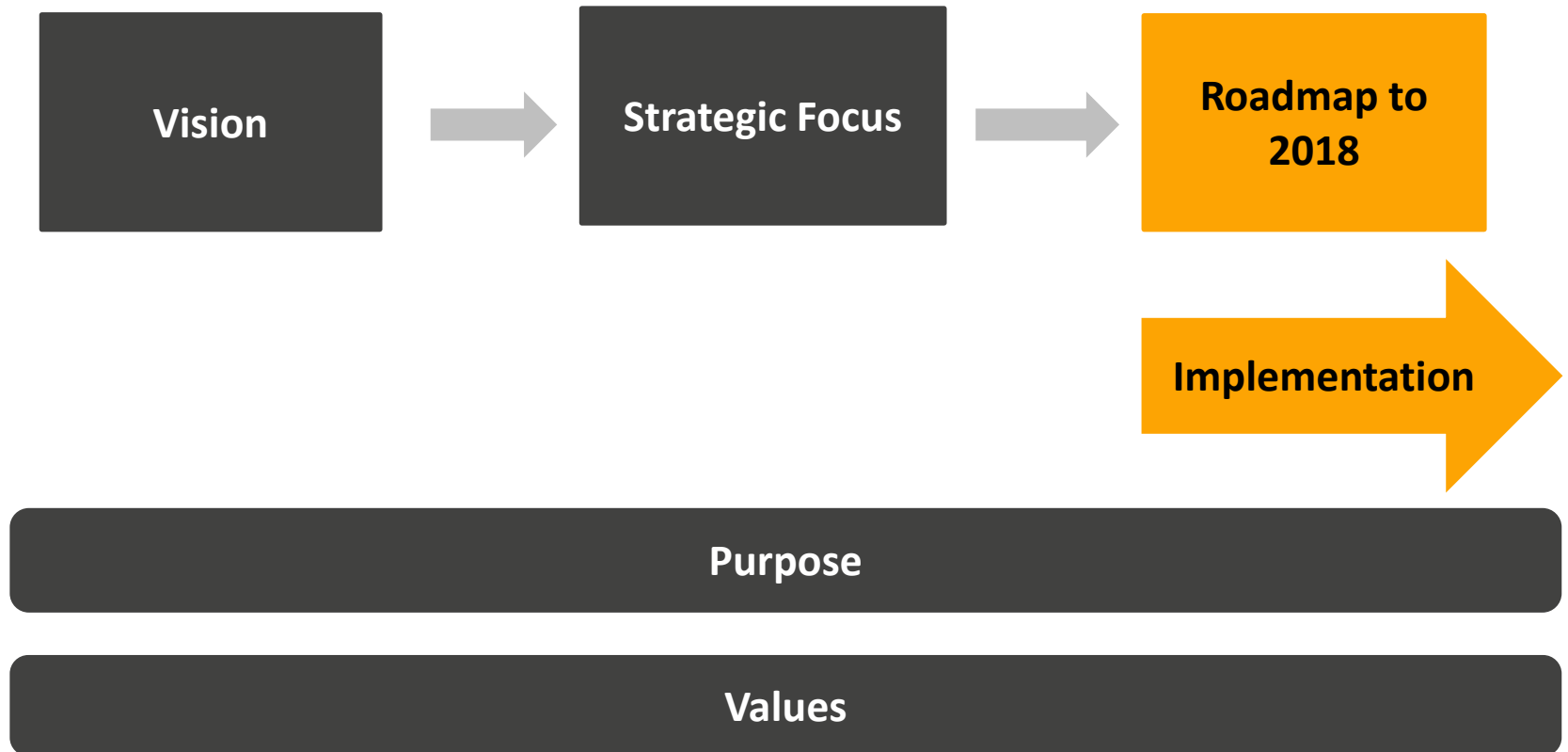
Pathway	Description	Technical Capability	Internal resources	Uniqueness & appropriateness	Overall
Vehicle price	DE could develop ways to decrease the price of EV's	Limited	Limited	Relatively unique, but best left to government and market actors	Low
Financial accessibility	DE could develop ways to make EV's more financially accessible – eg lease products	Limited	Limited	Relatively unique, but best left to market actors	Low
Vehicle availability & selection	DE could develop ways to improve vehicle selection	Limited	Moderate	Relatively unique, but best left to market actors	Low-to-moderate, but the dissemination of information is highly sought after
Social acceptability	DE could determine ways to make EV's more socially acceptable and thereby influence demand	Moderate	Moderate	Moderately unique - some market actors will be working to achieve same	Moderate
Health & Environmental Transparency	DE cannot influence environmental or health outcomes but it can (a) ensure that accurate information is available and correct 'fake news' about EV's, and (b) explain best practice.	Moderate	Moderate	Relatively unique, highly appropriate as an independent body	Moderate-to-high
Policy	DE could influence government policy and that of industry associations (eg green building council)	Moderate	Moderate	Moderately unique – limited new policy being developed	Moderate-to-high
Safety & Regulation	DE could assist in creating new regulation aimed at keeping EV users safe	Moderate	Moderate	Highly unique – limited activity in this area by government and industry groups	Moderate-to-high
Commercial Decision-Making	DE could help to influence fleet and heavy transport decision-making by specifically targeting industry groups and providing information and other tools to aid switching to EV	Moderate	Moderate	Highly unique – DE has focused on fleet conversion to date with some success, and heavy transport is a current area of focus for government	Moderate-to-high
International Trends & Markets	DE can be a source of relevant international EV news	High	High	Moderately unique – some media outlets provide this information already. Highly appropriate	Moderate-to-high



# Logical Strategic Focus Areas

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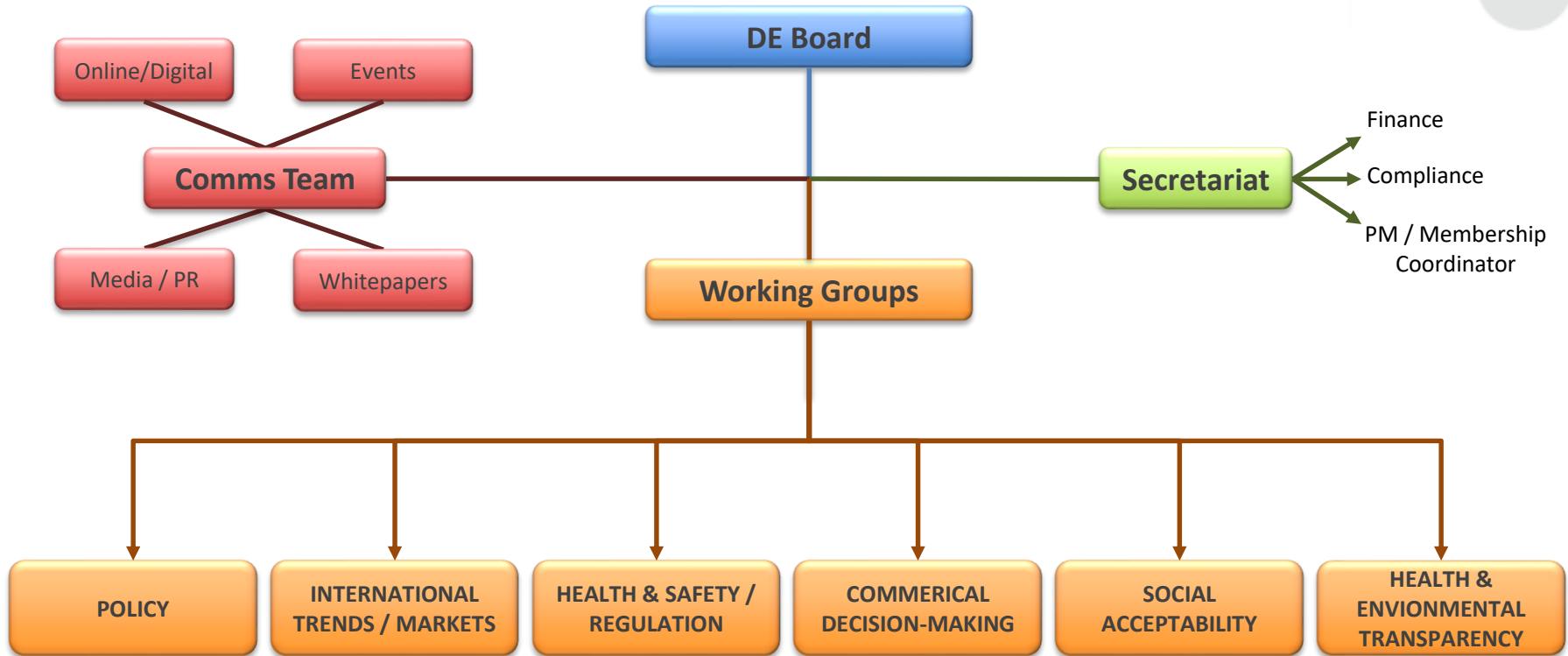
# Overview



# Translating Strategy into Tactical Activities

Pathway	Description	Tactical Approach
Vehicle availability & selection	DE could develop ways to improve vehicle selection	Increase online focus (possibly whitepapers?) on vehicle availability information and use this as a conduit to other areas of DE work.
Social acceptability	DE could determine ways to make EV's more socially acceptable and thereby influence demand	<ul style="list-style-type: none"> <li>▪ Publish vehicle availability data</li> <li>▪ Profile members positive EV outcomes</li> <li>▪ Work with others trying to achieve same</li> </ul>
Health & Environmental Transparency	DE cannot influence environmental or health outcomes but it can (a) ensure that accurate information is available and correct 'fake news' about EV's, and (b) explain best practice.	<ul style="list-style-type: none"> <li>▪ Publish accurate environmental data relevant to NZ</li> <li>▪ Publish relevant health data relevant to NZ</li> <li>▪ Identify and call out inaccurate information</li> </ul>
Policy	DE could influence government policy and that of industry associations (eg green building council)	<ul style="list-style-type: none"> <li>▪ Support 'willing' government agencies in policy development/deployment (eg ICCC)</li> <li>▪ Identify industry associations and utilise whitepaper process to help create new EV-positive policies</li> </ul>
Safety & Regulation	DE could assist in creating new regulation aimed at keeping EV users safe	<ul style="list-style-type: none"> <li>▪ Identify safety agencies and directly approach/encourage development of new safety regulation</li> <li>▪ Use whitepaper process to assist technical support and highlight problems</li> </ul>
Commercial Decision-Making	DE could help to influence fleet and heavy transport decision-making by specifically targeting industry groups and providing information and other tools to aid switching to EV	<ul style="list-style-type: none"> <li>▪ Continue focus on commercial fleets</li> <li>▪ Identify heavy transport groups and actors, on-board as members and influence decision-making via whitepaper participation</li> </ul>
International Trends & Markets	DE can be a source of relevant international EV news	<ul style="list-style-type: none"> <li>▪ Identify NZ-relevant international market elements and create moderated online feed.</li> </ul>

# Nominating board leadership/accountability for the tactical focus areas will create focus



# How will Working Groups Function?

1. Working Groups (WG) are set each year during the strategy refresh.
2. Each WG will have 2-4 DE board members as leaders.
3. Members, experts and relevant third parties are encouraged to join WG's.
4. Each WG will define its own terms of reference and agree a series of actions/deliverables to be completed each year. These deliverables should be relevant to the strategic purpose of the group and contribute to member's benefits.
5. Actions/deliverables may include:
  - Preparation of whitepapers
  - Dissemination of newsletter material
  - Events/PR
6. Each Working Group will report back to the DE board each month to update on activities and discuss progress/challenges/successes.

# In summary

1. Widening the vision and current focus to include more forms of **e-mobility**
2. Building on the trusted DE brand to lift role as an **influencing body**
3. Increasing the capacity of delivery through establishment of **focused working groups**



[driveelectric.org.nz](https://driveelectric.org.nz)