

UK ELECTRIC VEHICLE INDUSTRY

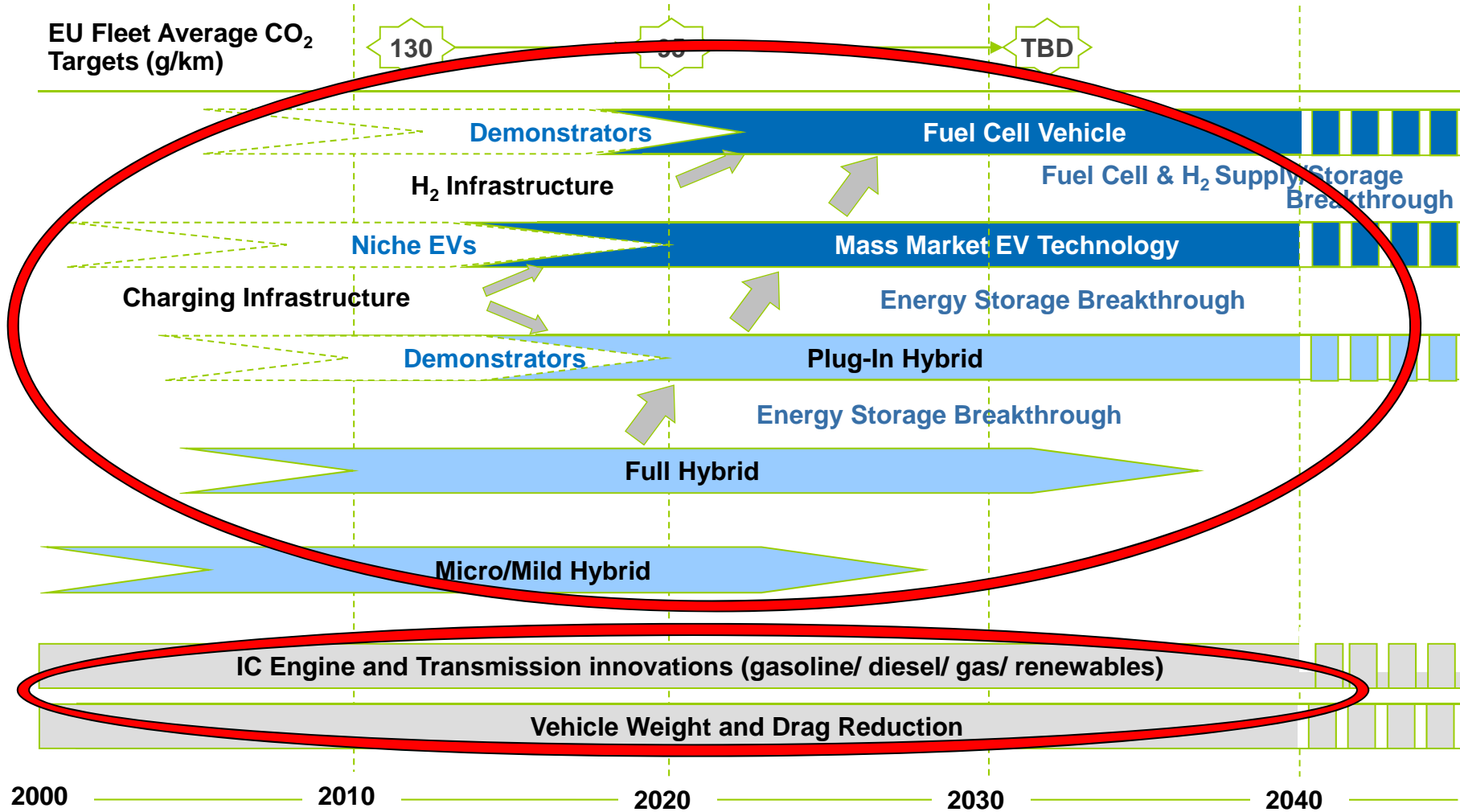
RECENT PROGRESS → FUTURE PLANS

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CONTENTS:

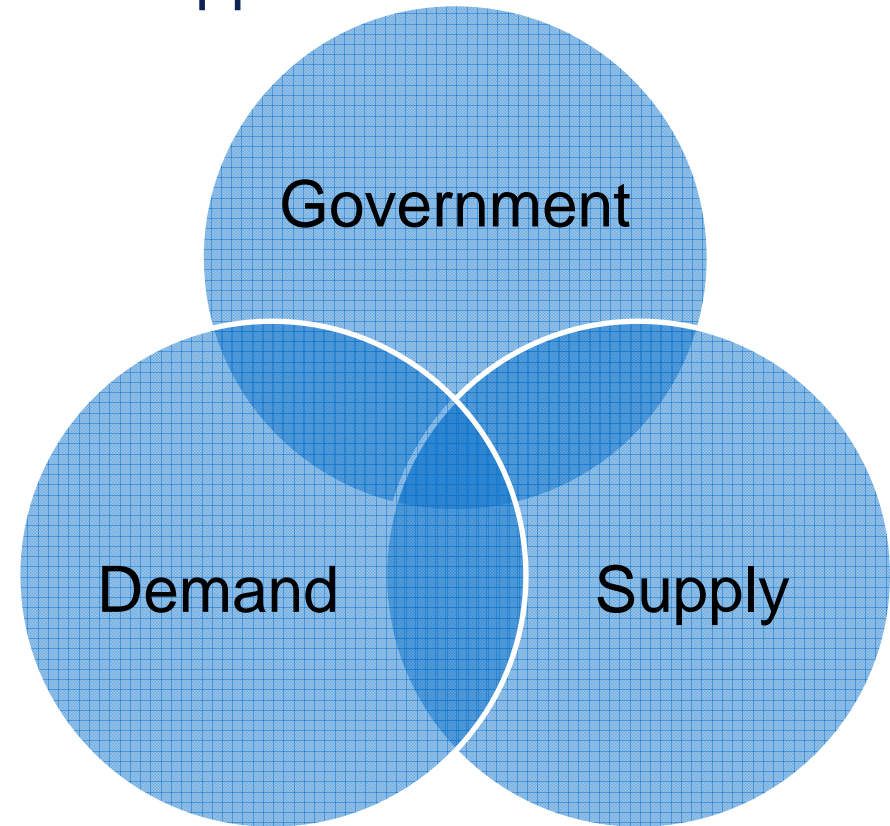
- UK Automotive industry
- SMMT Electric Vehicle activity
 - Recent progress
 - What happens next

INDUSTRY CONSENSUS ROADMAP: NAIGT REPORT



INDUSTRY PROGRESS: THREE ELEMENTS

- ✓ Government understanding and support
- ✓ Industry ready
- ✓ Market ready



THREE ELEMENTS: GOVERNMENT SUPPORT

- ✓ National government



Office for Low
Emission Vehicles

R&D support

- £ 120 million + Technology Strategy Board Low Carbon Vehicles (total over £200m)
- Skills and trainings programmes



Manufacturing support

- £ 20 million supply chain competition (total over £50m)
- Emphasis on SMEs and sourcing in the UK

THREE ELEMENTS: GOVERNMENT SUPPORT

Promotion of technology

- £ 300 million consumer incentives
 - £ 43 million until March 2012
- £ 45 million Green Bus Fund
- £ 25 million ultra low carbon vehicle demo-programme
- £ 24 million in high value manufacturing R&D

Further measures

- Vehicle Excise Duty exemption
- 1st year capital allowances for fleet vehicles and vans
- 0% Benefit in Kind/ company car tax for 5 years
- Lower rate of VAT for domestic electricity

THREE ELEMENTS: GOVERNMENT SUPPORT

Plugged-in Places

- £ 30 million for 'Plugged-in Places'
- 50% Government funding for infrastructure installation

Plug-in Car Grant

- Purchase incentive:
25% up to £5,000
- (Review in 2012)



THREE ELEMENTS: GOVERNMENT SUPPORT

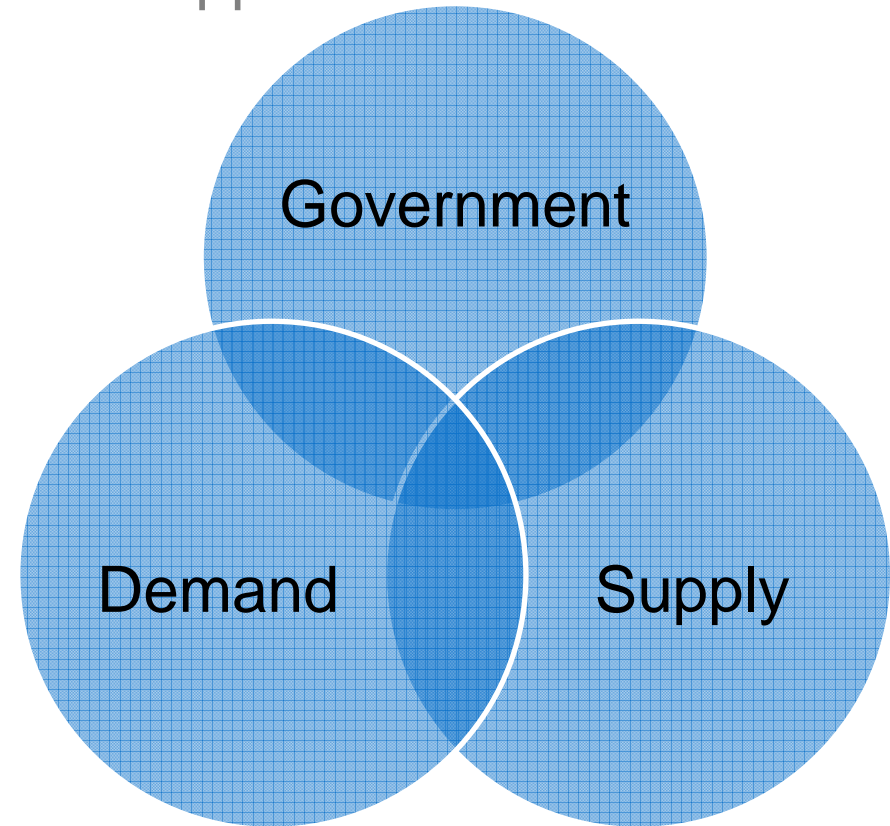
✓ Local government

- Eight Plugged-In Places
- Interoperability focus
- 15,000 charge points
- Own EV fleets
- Local EV incentives
- Consumer focus: e.g. Source London



INDUSTRY PROGRESS: THREE ELEMENTS

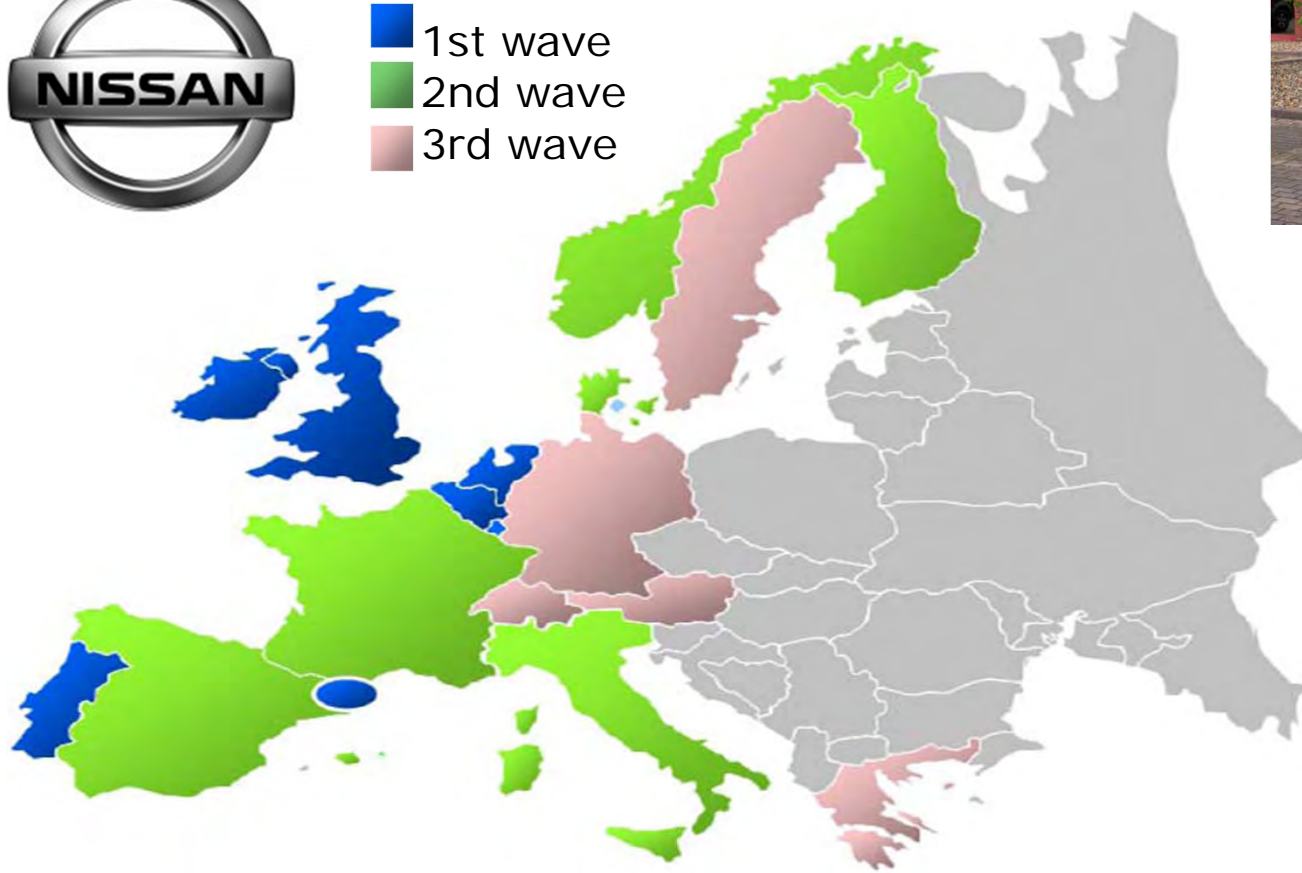
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INDUSTRY PROGRESS: KEY INGREDIENTS



- 1st wave
- 2nd wave
- 3rd wave



VEHICLES AVAILABLE IN 2010 AND 2011

Brand	Model	Type
Allied Electric Vehicles	e-Bipper Tepee	Pure-EV
Allied Electric Vehicles	e-Expert Tepee	Pure-EV
Allied Electric Vehicles	e-Partner Tepee	Pure-EV
ECC	ev'ie	Pure-EV
Mitsubishi	iMiEV	Pure-EV
Tesla	Tesla	Pure-EV
Citroën	C-Zero	Pure-EV
Peugeot	iOn	Pure-EV



Brand	Model	Type
Tata	Vista	Pure-EV
Nissan	Leaf	Pure-EV
Hyundai	Ix-metro	Pure-EV
Westfield (race car)	iRacer	Pure-EV

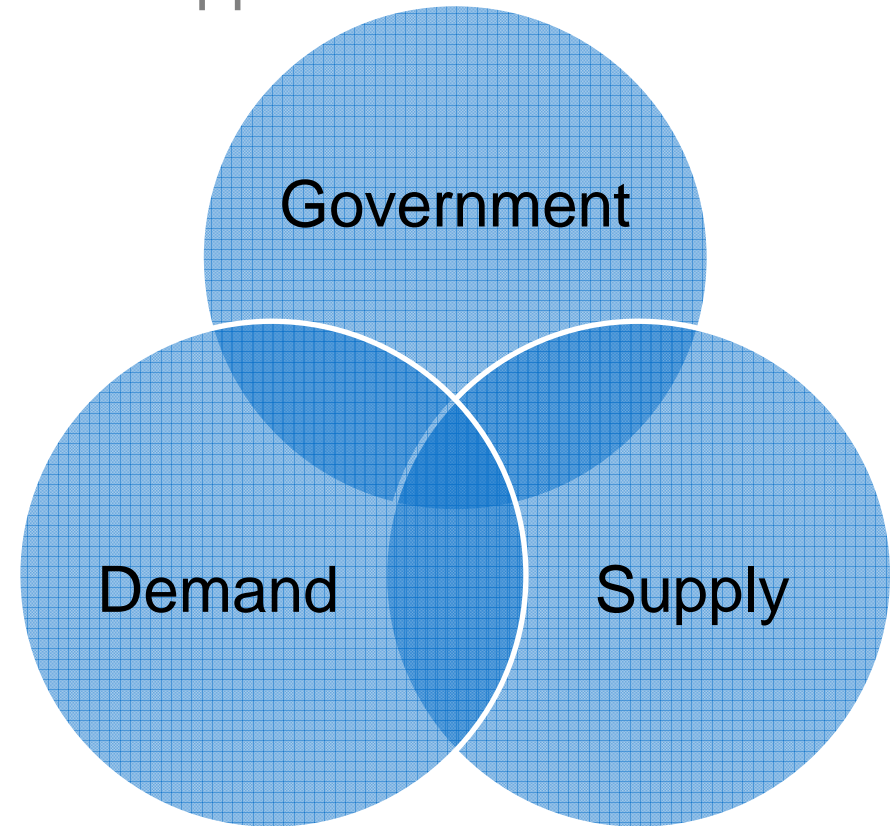


VEHICLES AVAILABLE IN 2012

Brand	Model	Type
Lightning Car Company	The Lightning GT	Pure-EV
Renault	Fluence	Pure-EV
Vauxhall	Ampera	E-REV
Renault	Zoe	Pure-EV
Audi	E-Tron	Pure-EV
Chevrolet	Volt	E-REV
Ford	Focus	Pure-EV
Morgan	Lifecar2	E-REV
Smart	ED	Pure-EV
Tesla	Model S	Pure-EV
Westfield	Sport-E	Pure-EV
Axon	E-PHEV	PHV

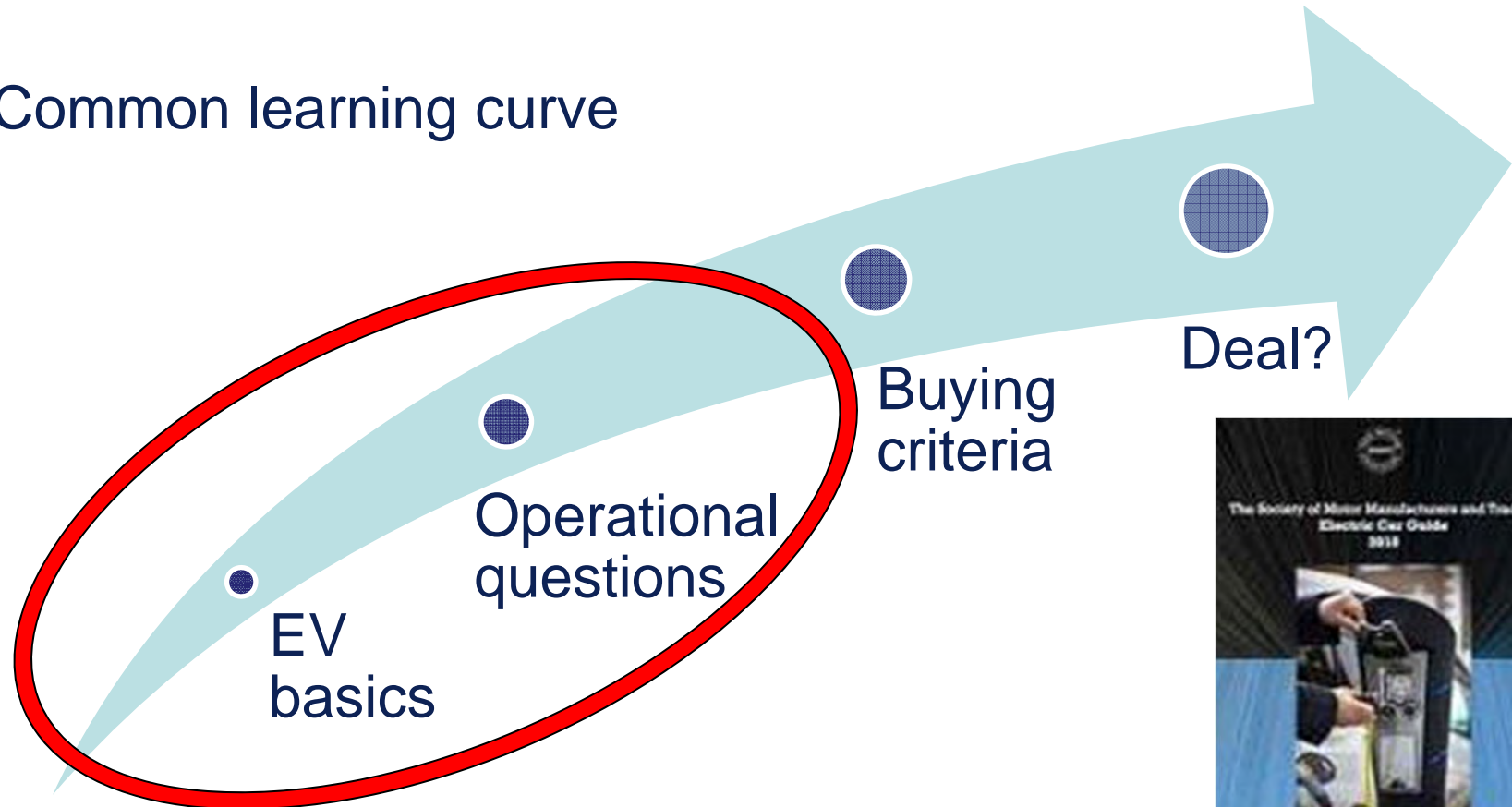
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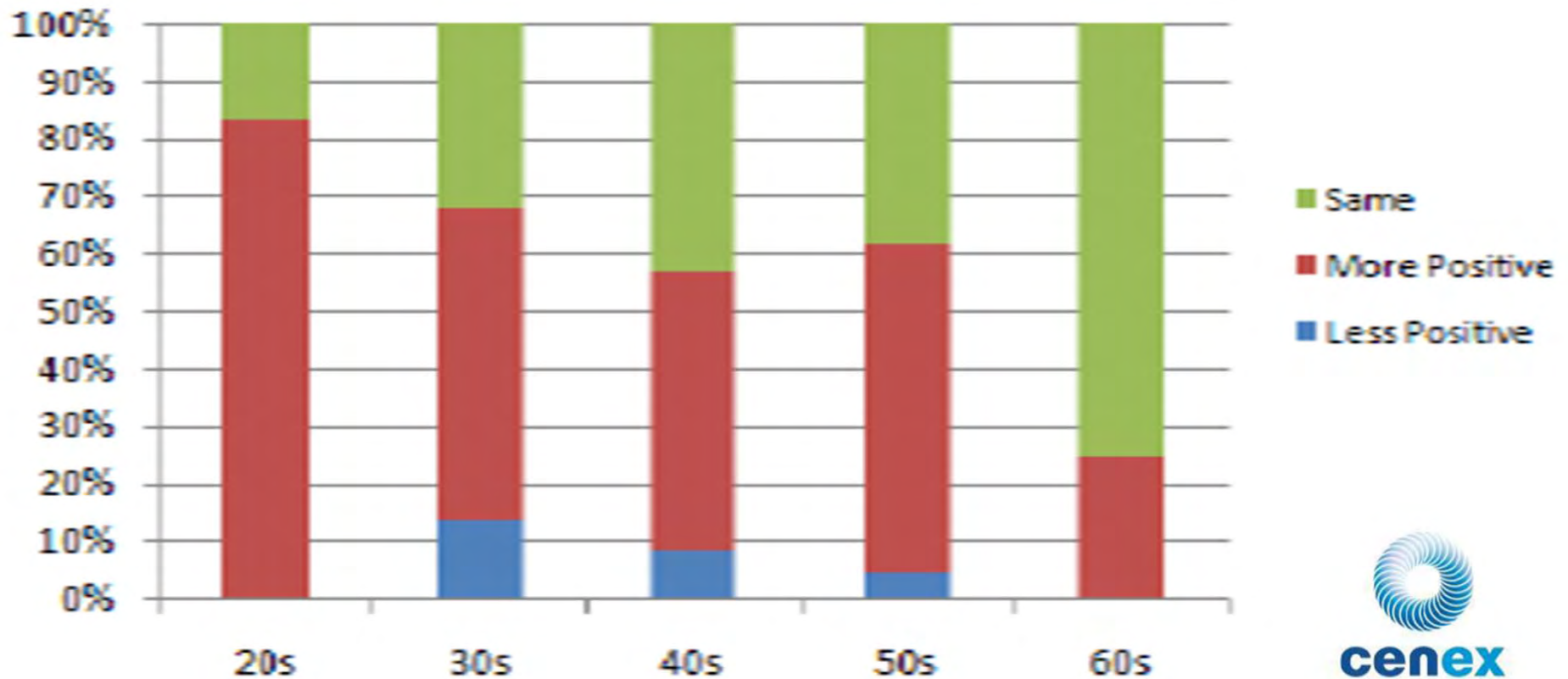
INDUSTRY PROGRESS: DEMAND

- Common learning curve



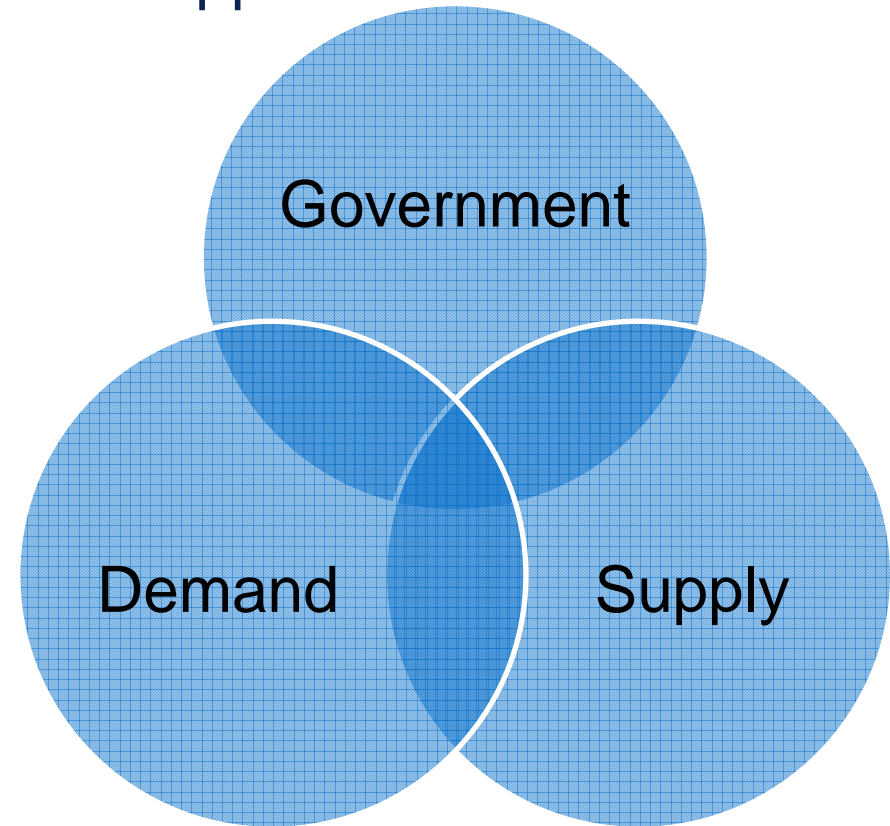
PERCEPTION CHANGE

Users attitude towards electric vehicles after trial, by age group



INDUSTRY PROGRESS: THREE ELEMENTS

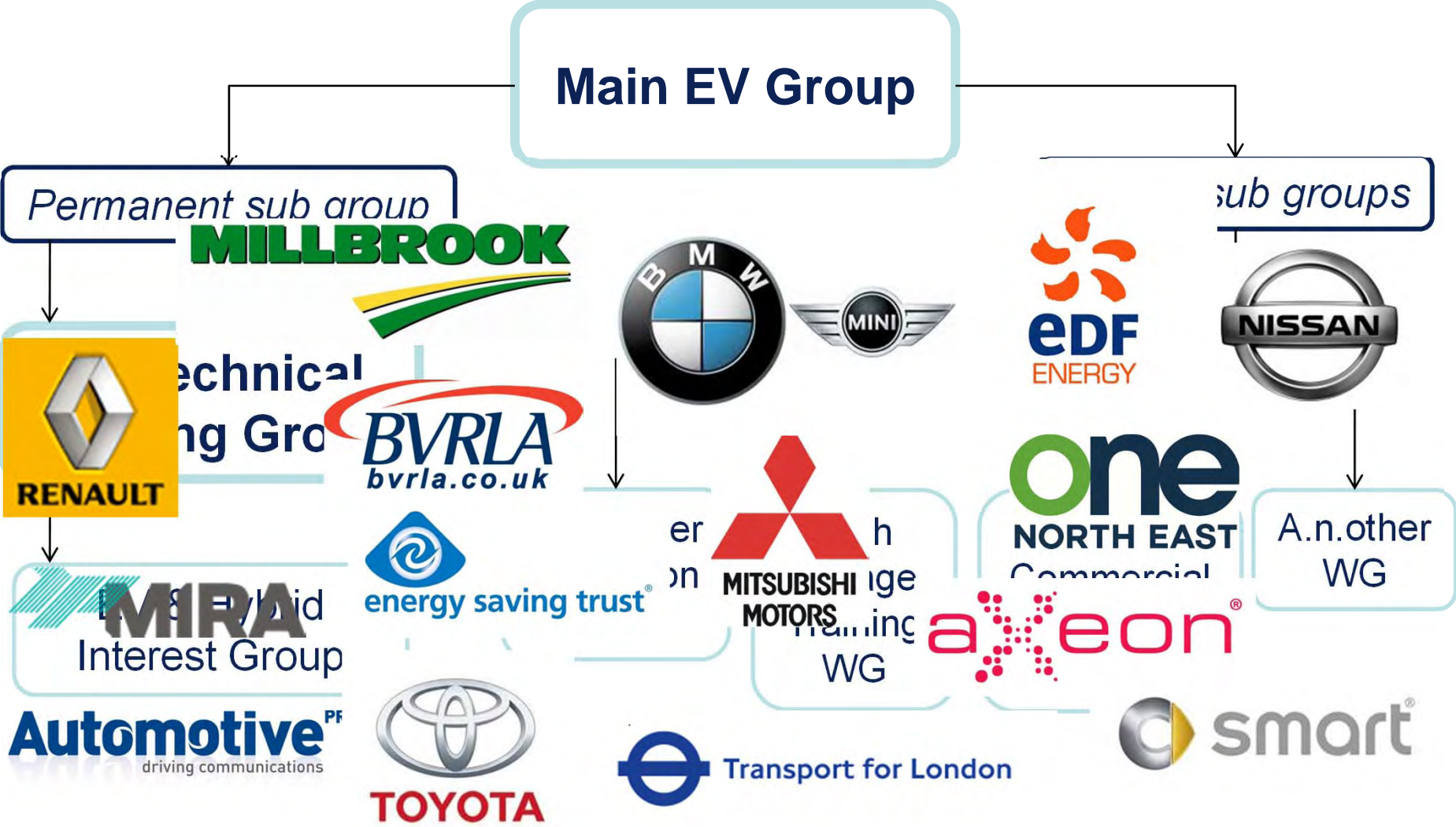
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SMMT EV ACTIVITY:



EV GROUP FOCUSES ON:

1. Policy
2. Infrastructure
3. Technical
4. Investment
5. Consumer perception
6. EV Hub



WHAT HAPPENS NEXT

1. Market support

- a. Electric Car Guide 2011
- b. Insurance
- c. Residual values

2. Low Carbon Commercial Vehicle framework

3. International presence

EV TECHNICAL WORKING GROUP FOCUSES ON:

1. Regulation
2. Standardisation
3. Training
4. End of life/ recycling
5. Safety



EV TECHNICAL WORKING GROUP IN 2011

1. Infrastructure

- a. Charger standardisation
- b. Plugged-In Places collaboration
- c. (Induction charging)
- d. (Vehicle to grid)

2. Training roll out

3. End of life/ recycling

4. Safety

Partnerships are key



THANK YOU

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