# Technical and Operational Management Forum

6 February 2020

**Hosted by**

BVRLA

IMI INSTITUTE OF THE MOTOR INDUSTRY

bvrla.co.uk

# Welcome and Agenda

# Technical and Operational Management Forum

Hosted by

BVRLA

IMI INSTITUTE OF THE MOTOR INDUSTRY

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All BVRLA meetings and events, including social events, are subject to the application of competition law and therefore must be conducted in compliance with competition law. Any business information which is sensitive or strategically useful must not be discussed, including any reference to pricing, margins, discounts, trading terms, use of third-party suppliers or market share. Members are reminded that failure to comply with competition law may bring with it serious consequences for them as individuals and their companies. Such consequences include heavy fines and, in certain cases, the imposition of criminal penalties and sentences.

BVRLA

# Agenda

| | | |
|---|---|---|
| *10:00* | **Welcome and Agenda** | Kit Wisdom, Operations Director, Tusker and TOM Committee Chairman |
| *10:05* | **Welcome from the IMI** | Chris Cotterill, UK Business Development Manager |
| *10:20* | **Session 1: Thatcham Research**<br>Latest updates on technology | Adrian Watson, Engineering Research Manager, Thatcham |
| *10:45* | **Session 2: SMR and Tyres for Electric Vehicles** | Luke Penn, Strategic Account Manager, Kwik Fit |
| *11:10* | *Coffee Break* | |
| *11:35* | **Session 3: Green Parts (supplier viewpoint)**<br>General overview of green parts and considerations for rental and leasing companies | George Georgiou, Managing Director, SureTrak Ltd |
| 11:50 | **Session 4: Green Parts (insurer viewpoint)** | Nick Rossiter, Motor Damage Strategy Manager, Allianz Claims |
| 12:15 | **Session 5: BVRLA Policy Update**<br>Latest policy and insights – electric vehicles, taxation | Catherine Bowen and Thomas McLennan, Senior Policy Advisors, BVRLA |
| *12:15* | **Workshop Session**<br>Delegates to be split into groups to discuss main technical & operational issues, how the BVRLA can assist and if these topics should be featured at future forums | |
| *13:00* | **Chairman's Closing Comments** | Kit Wisdom, Operations Director, Tusker and TOM Committee Chairman |
| *13:10* | *Close of Forum and Lunch* | |

# Welcome from the IMI

# Technical and Operational Management Forum

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# BVRLA – Technical & Operational Management Forum

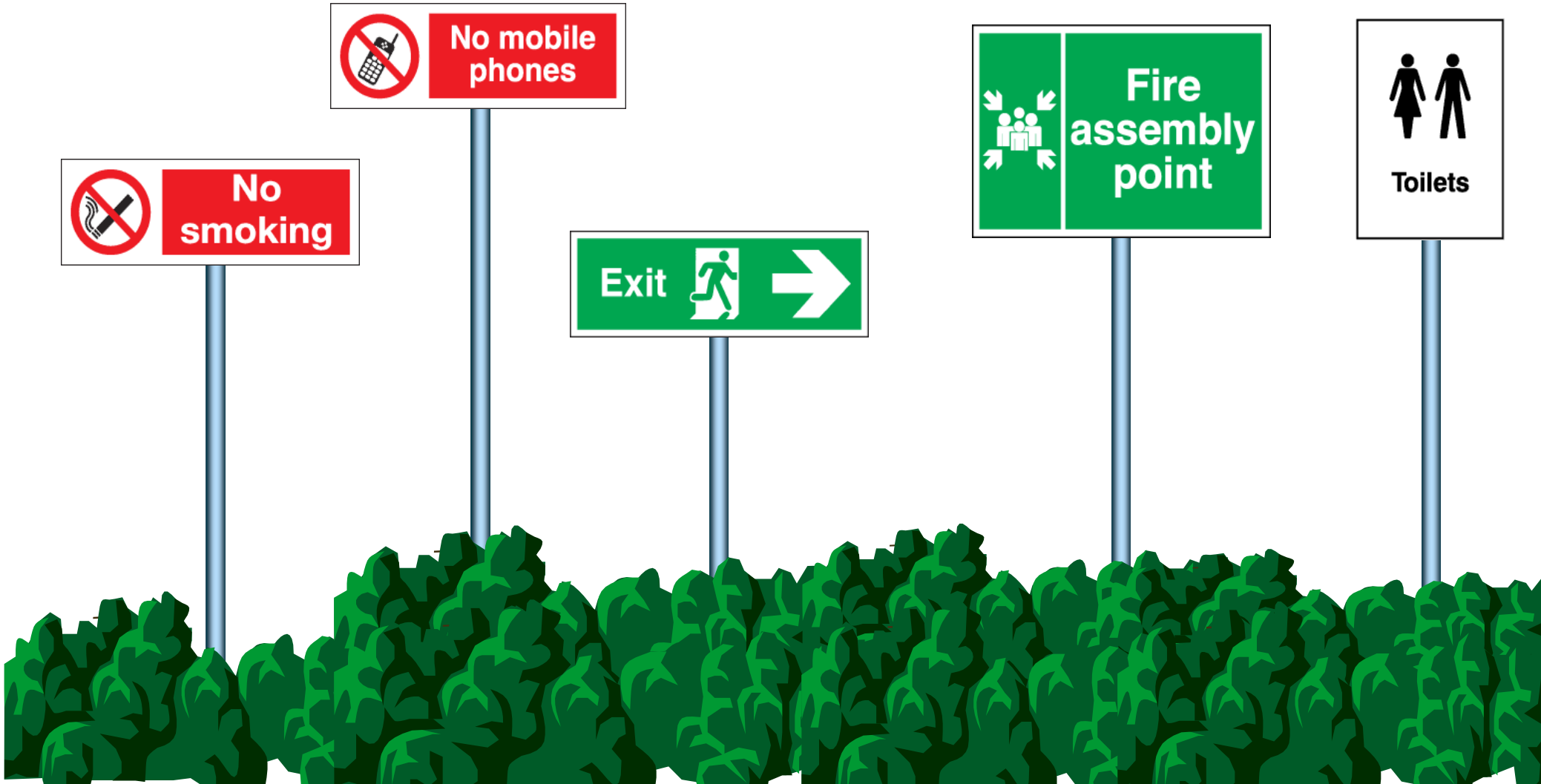
## IMI Update

Fanshaws

6th February 2020


IMI INSTITUTE OF THE MOTOR INDUSTRY

# Housekeeping for today




IMI INSTITUTE OF THE MOTOR INDUSTRY

Established 1920

**IMI Established in 1920**

**Unique – Only Automotive Professional Body, Awarding Body & Sector Skills Council Worldwide**

**Working with the Industry to understand challenges and skills requirements**

**Working with employers, training providers & colleges to deliver skills solutions**

**TOGETHER DRIVING UP STANDARDS**

IMI INSTITUTE OF THE MOTOR INDUSTRY

INSTITUTE OF THE MOTOR INDUSTRY

## IMI Centenary Year

To celebrate the IMI Centenary in 2020, a commemorative logo has been produced. We will be using the new logo throughout the year in order to generate maximum awareness of this huge milestone.

## Getting Involved

The year will be packed with lots of events, activities and opportunities to support our charitable ambitions for our 100th year.

Watch this space for specific details as they emerge…

INSTITUTE OF THE MOTOR INDUSTRY
Driving the industry since 1920

# IMI Centenary Dinner

11th March 2020

Intercontinental, Park Lane, London


IMI INSTITUTE OF THE MOTOR INDUSTRY

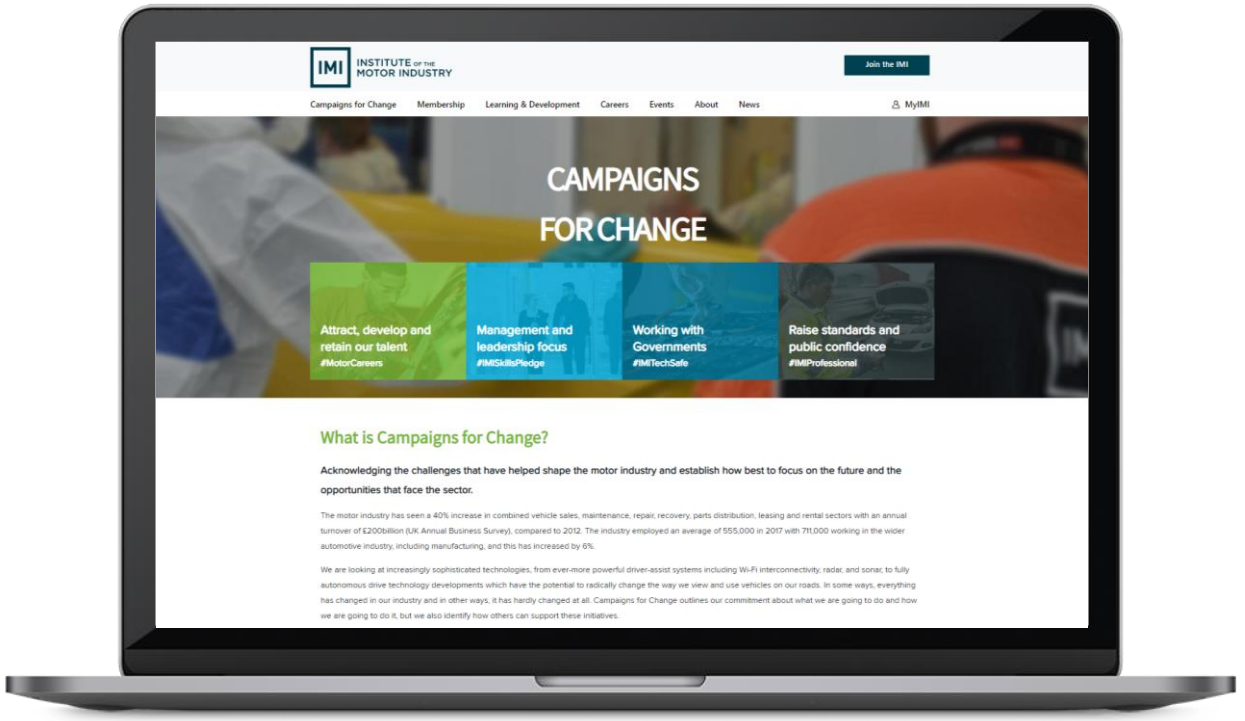
# 2020 Recognition Awards for Motor Industry Stars

1. The Patrons Award 2020: Championing Diversity in Automotive
2. Apprentice of the Year Award
3. Full-time Student of the Year Award
4. Contribution to the work of the IMI
5. Outstanding Contribution to the Motor Industry Award
6. Partner of the Year Award


IMI have six national awards to recognise the outstanding contribution that both individuals and organisations make to the work of the IMI and to the development of the motor industry.

IMI INSTITUTE OF THE MOTOR INDUSTRY

# IMI Campaigns for Change

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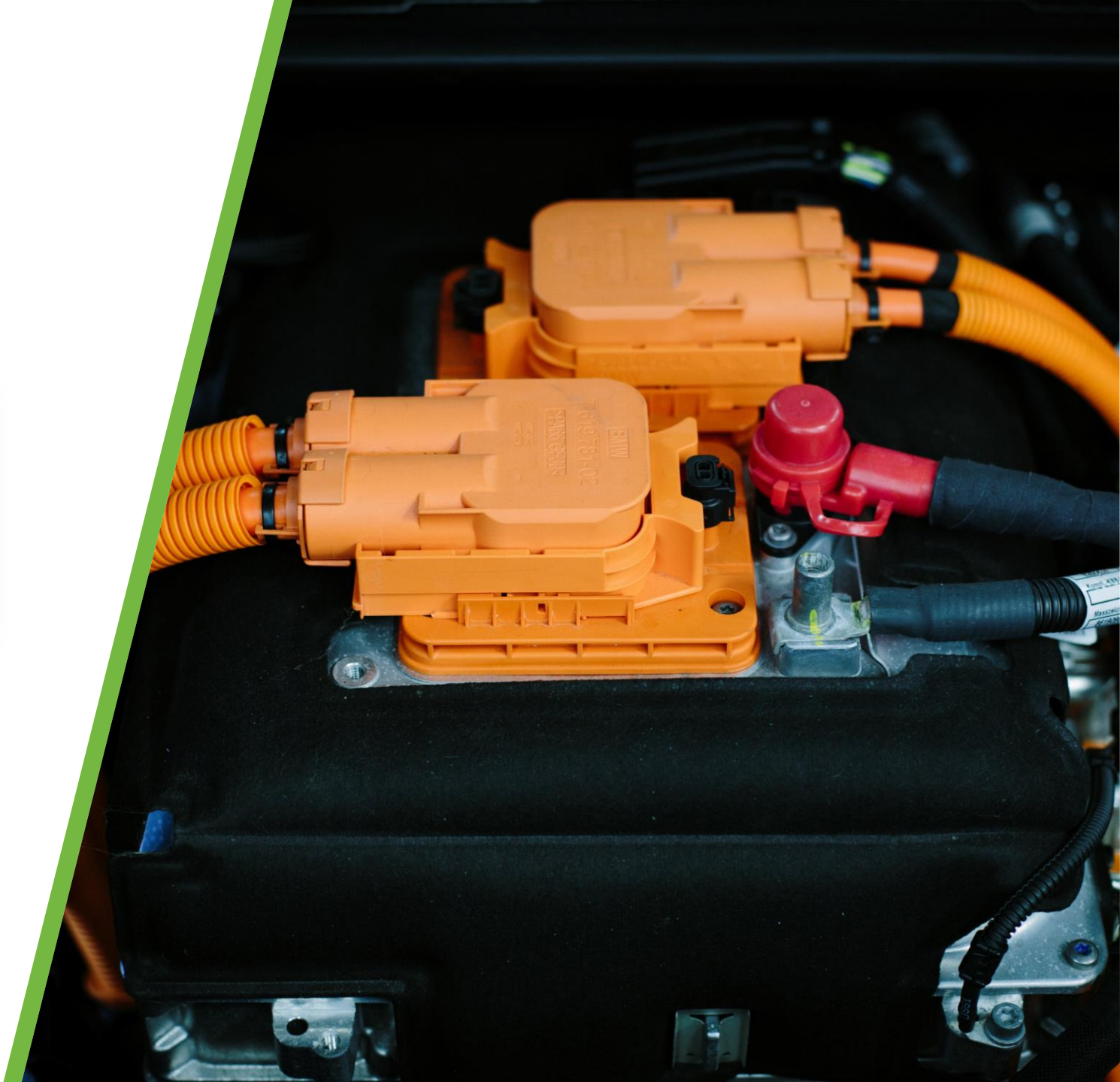
IMI TechSafe
collective mark



# Electric Vehicle Professional Register
# Certification & Retention

Adaptable to support sector-agreed accredited
learning & development of technicians to
***be safe*** and ***make safe***
current and future safety critical technologies:
**Electric Vehicles, ADAS** and Autonomous Vehicles.

IMI TechSafe collective mark

IMI INSTITUTE OF THE MOTOR INDUSTRY

Level 1:  Award in Electric/Hybrid Vehicle Awareness

Level 2.1: Electric/Hybrid Vehicle Hazard Management for Emergency and Recovery Personnel

Level 2.2: Electric/Hybrid Vehicle Routine Maintenance Activities

Level 3: Electric/Hybrid Vehicle Repair and Replacement

Level 4: Diagnosis, Testing and Repair of EV/HEV and Components

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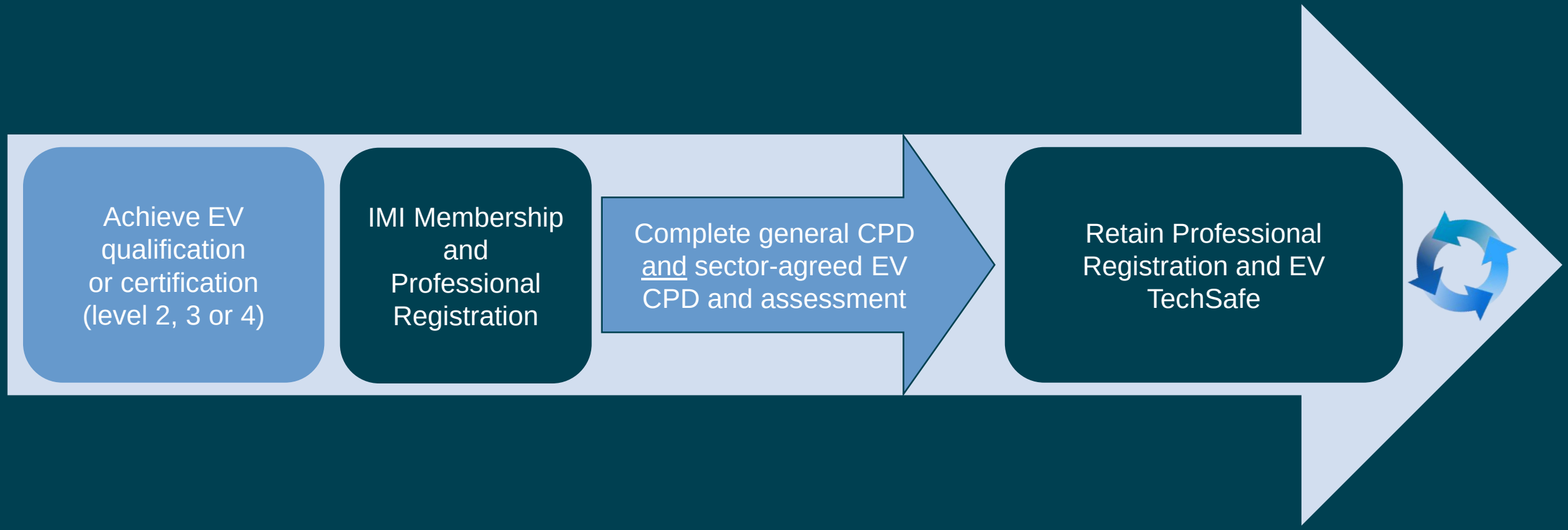
# Electrified Vehicle Professional Register
# Certification & Retention

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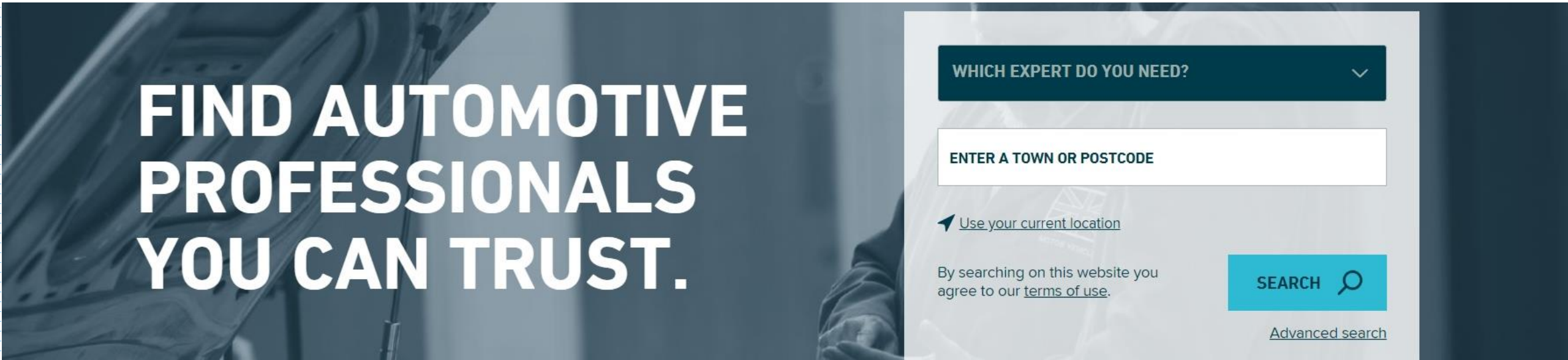
# Updates are coming to the IMI Professional Register

In-line with the pending formal launch of IMI TechSafe publically. The Professional Register will be updated with additional functionality to be able to search for TechSafe related competence.



Department for Transport

**Minister of State for the Future of Transport, George Freeman, MP said:**

"Electrification of vehicles is happening and we want to make sure that drivers have confidence that their vehicles can be maintained and serviced to the highest standard. Safety will always be our first priority and building a sector equipped to manage the increasing demand of electrified vehicles is key.

"Today's launch of the IMI TechSafe™ standards is a crucial step in providing electric car buyers with extra assurance and towards achieving a zero-emission future."

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## Contact:

Chris Cotterill – UK Business Development Manager

chrisc@theimi.org.uk

07393 014831

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# Session 1 – Adrian Watson, Thatcham Research

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# The Changing Dynamic of Vehicle Repair

**Adrian Watson**
Engineering Research Manager

6th February 2020

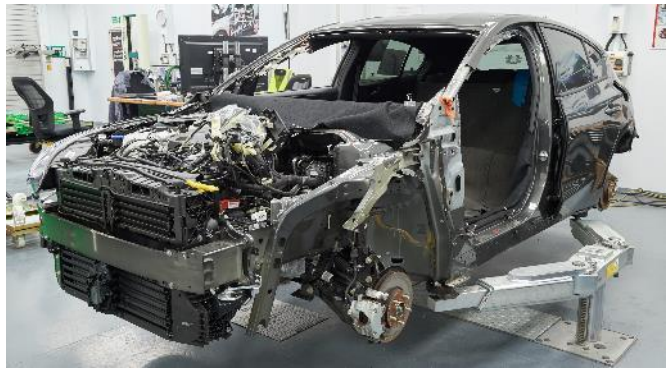
Thatcham Research
SAFER CARS. FEWER CRASHES

# Thatcham Research

- Non-profit organisation
- Funded by UK Motor Insurance Industry
- Research | Data | Engagement
- **Inform underwriting accuracy**
- **Control claims cost**
- **Support strategic planning**


# Thatcham Research


**Safety**



**Repair**

**Security**

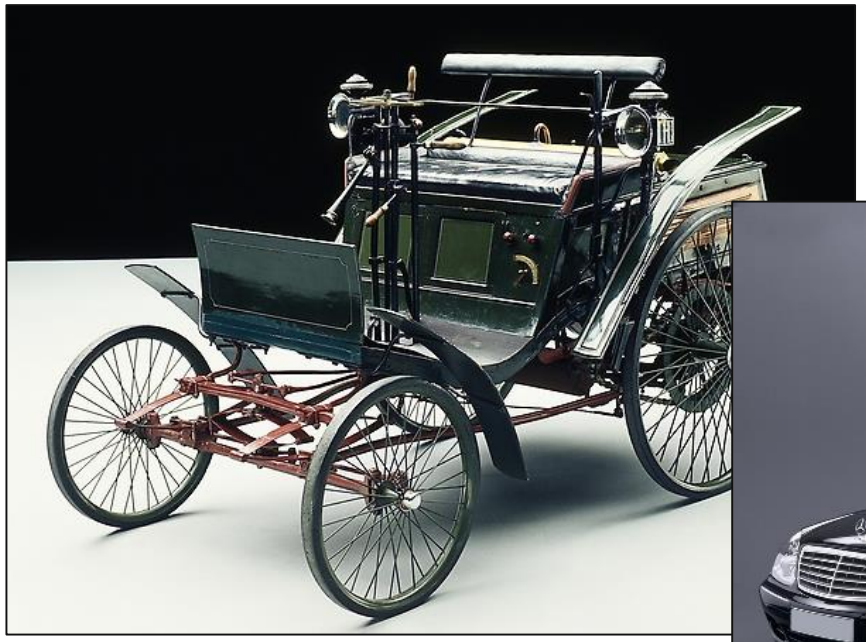
# Repair Trends

- Increased severity
- Parts price increases
- Lack of VM support
- Replace over repair
- OEM over aftermarket

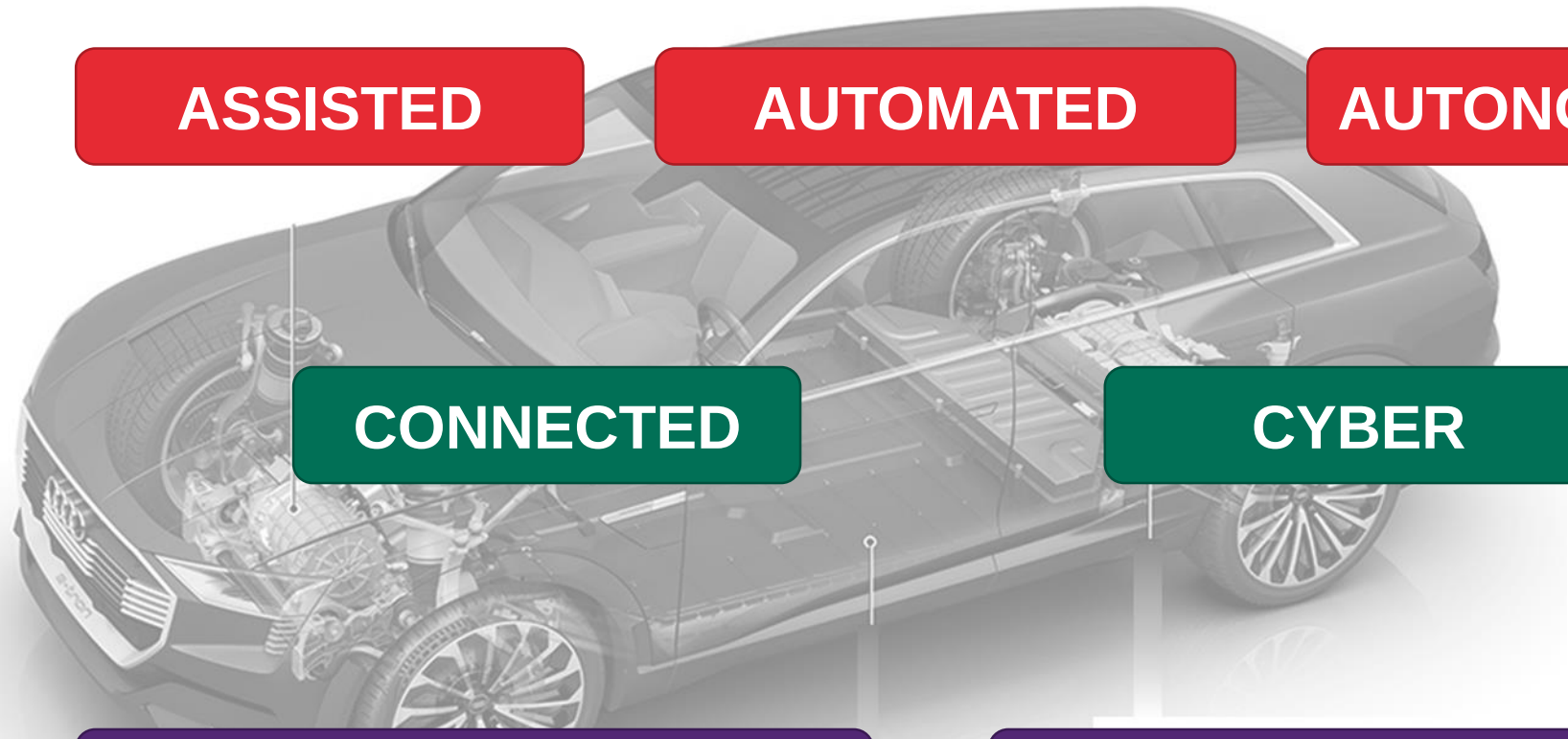
## THE IMPACT OF TECHNOLOGY

# Vehicle Technology

Vehicle technology will progress more in the next 5 years than it has in the last 50 years



# ACE Technology



**A**

- ASSISTED
- AUTOMATED
- AUTONOMOUS

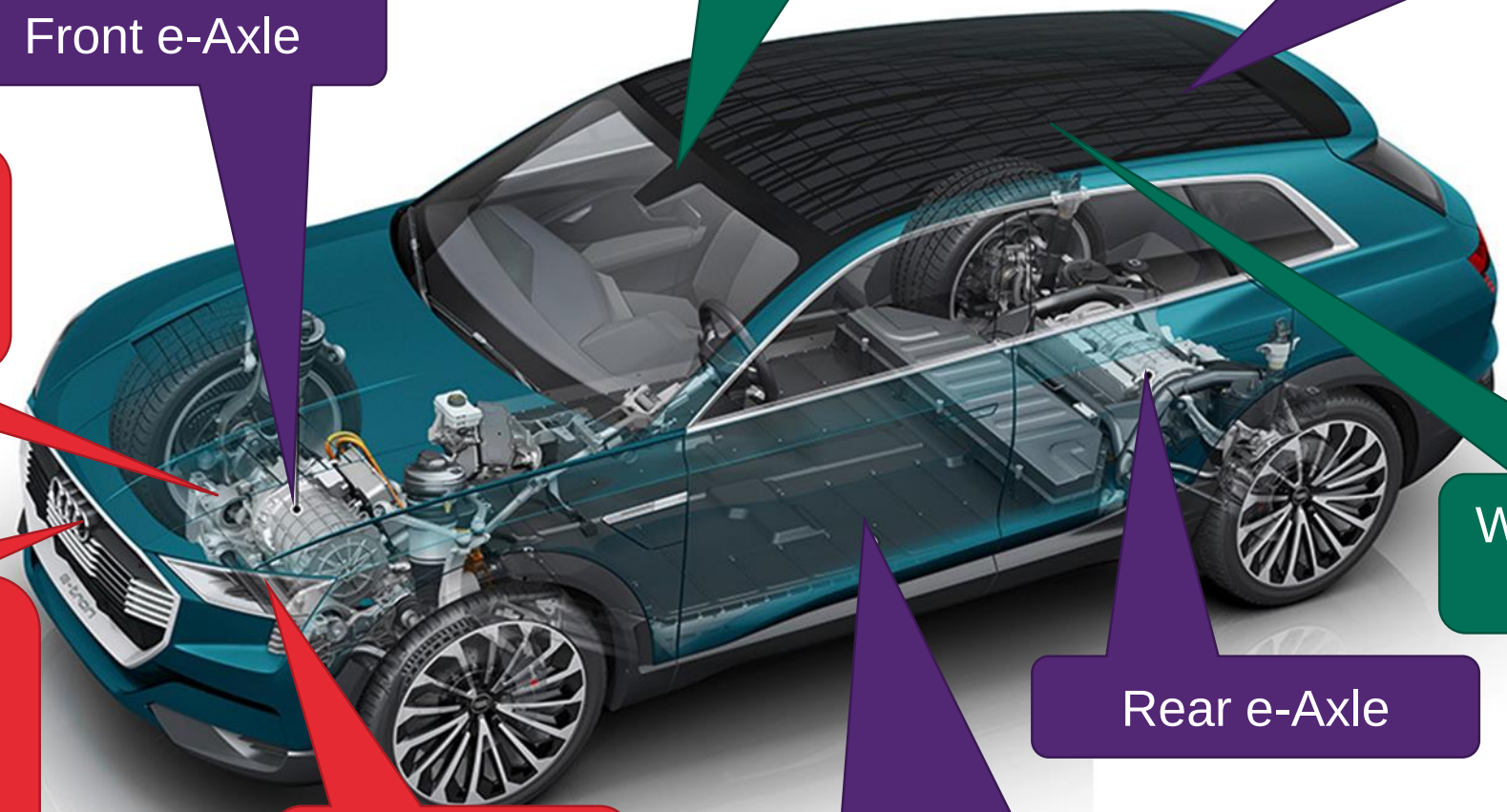
**C**

- CONNECTED
- CYBER

**E**

- ELECTRICIFIED
- EFFICIENT STRUCTURES

# ACE Technology



OTA software updates

Aluminium, HSS, CFRP & magnesium body structure

Front e-Axle

Nvidia zFAS domain controller & Flexray network

Wi-Fi; Bluetooth; 2x SIM

18 sensors: Long- & short-range RADAR; cameras *Scanning LIDAR*;

Rear e-Axle

Active matrix LED laser headlights

Skateboard construction 95kWh battery

A

ASSISTED AUTOMATED AUTONOMOUS

# ADAS systems mitigating & preventing collisions

- Today's vehicles
- Autonomous Emergency Braking (AEB)
- Emergency Lane Keeping (ELK)
- Intelligent Speed Assist (ISA)
- EU regulation
- Matrix headlights
- Driver support

A

ASSISTED AUTOMATED AUTONOMOUS

# Developing into automated & autonomous vehicles

- Level 2 assisted into Level 3 ltd automation
- Driver performs other tasks
- Tomorrow's vehicles
- Scenario-based
- Optional fitment
- Autonomous 'pods'
- Personal/product liability
- Transition period

# A

**ASSISTED** **AUTOMATED** **AUTONOMOUS**

## Increases in claim severity masking reduction in frequency

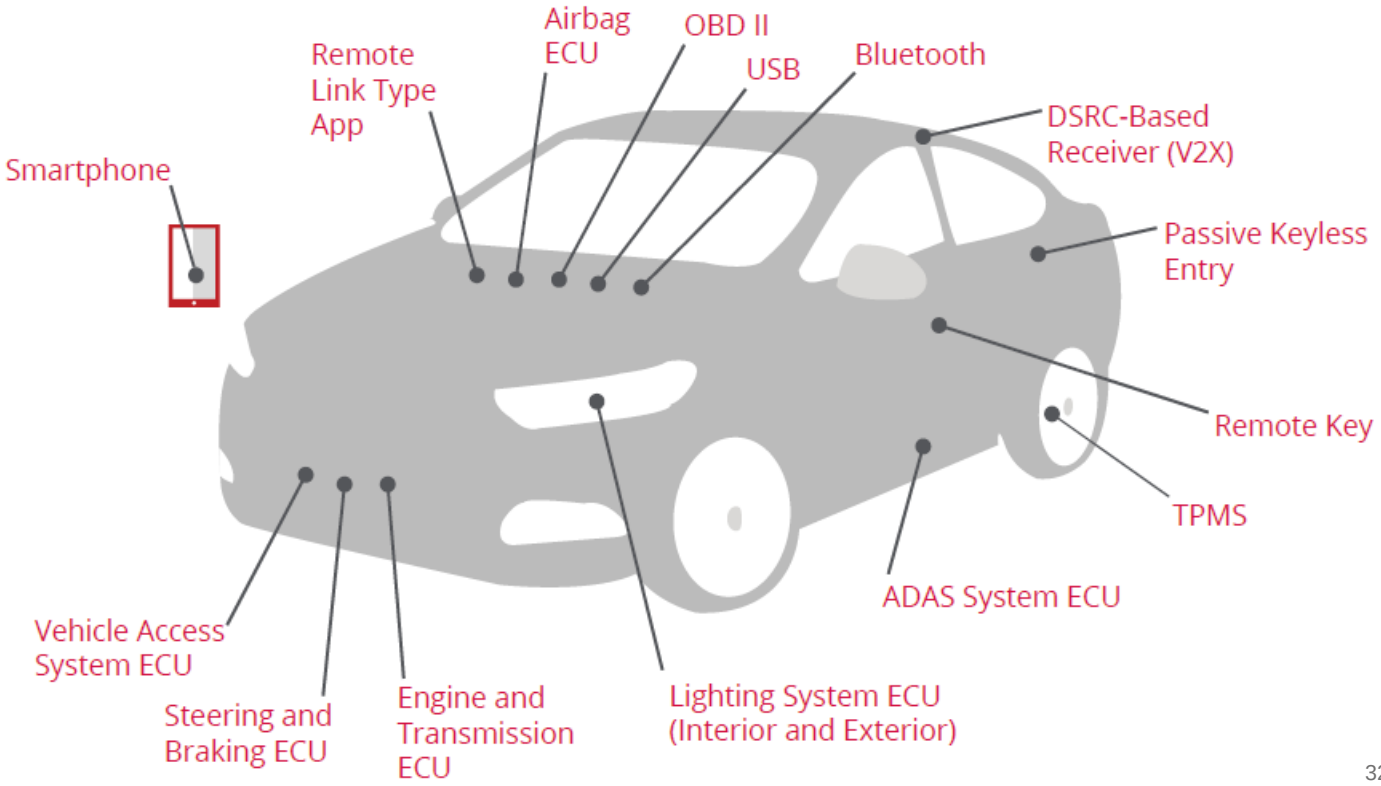

- Today's ADAS repair challenge
- Vulnerable sensors
- Vehicle fitment
- Bumper replace over repair
- Sensor calibration
- Manufacturer guidance
- What is a safe repair?

C

**CONNECTED** **CYBER**

# Network of systems connected to the internet of things

- Today: Wi-Fi, Bluetooth, SIM
- OTA software updates
- OEM ecosystem
- System complexity
- Cyber security
- 5G connectivity

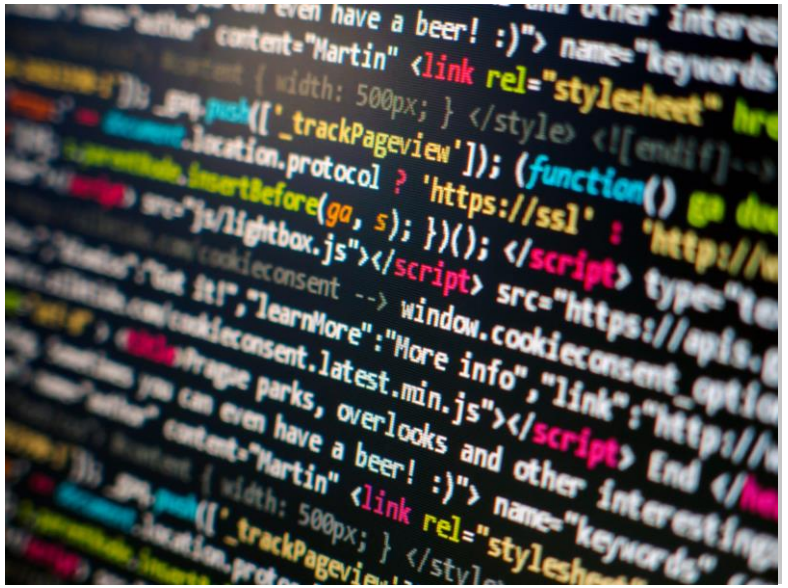


C

CONNECTED

CYBER

# Harness connectivity to benefit the claims process



- Notification of damage
- OEM backend authentication
- Customer data
- Software versions
- Ransomware/DoS

E

**ELECTRIFICATION** **EFFICIENT STRUCTURES**

# €60 billion R&D investment by German manufacturers over next 3 years

- Battery electric vehicle
- Plug-in hybrid
- Fuel cell
- Mild-hybrid (48v)
- Cell technology
- Vehicle structural architecture

E

**ELECTRIFICATION** **EFFICIENT STRUCTURES**

# EVs are not inherently unsafe, but awareness is paramount

- Safe handling & repair process
- Awareness, identification & guidance
- Repairability by design
- Diagnostics – Battery Management Systems
- Battery cost
- Battery ownership or lease
- Impact energy & damage profile

E

ELECTRIFICATION

EFFICIENT STRUCTURES

# Optimising vehicle mass whilst maintaining crash performance

- Vehicle structural architecture
- EV range
- IC emissions
- Crash-worthiness
- UHSS, metallics, plastics

E

ELECTRIFICATION

EFFICIENT STRUCTURES

# Design is driven by function & performance, not by repairability

- Non-sectionable materials
- Single-piece components
- Complex joints
- Intrusive repair
- Lack of VM methods
- Volume vehicle – Ford Focus

# Repair Research

**ADAS repair**

**Powertrain electrification**

**48v architecture**

**Advanced materials**

**Headlamps**

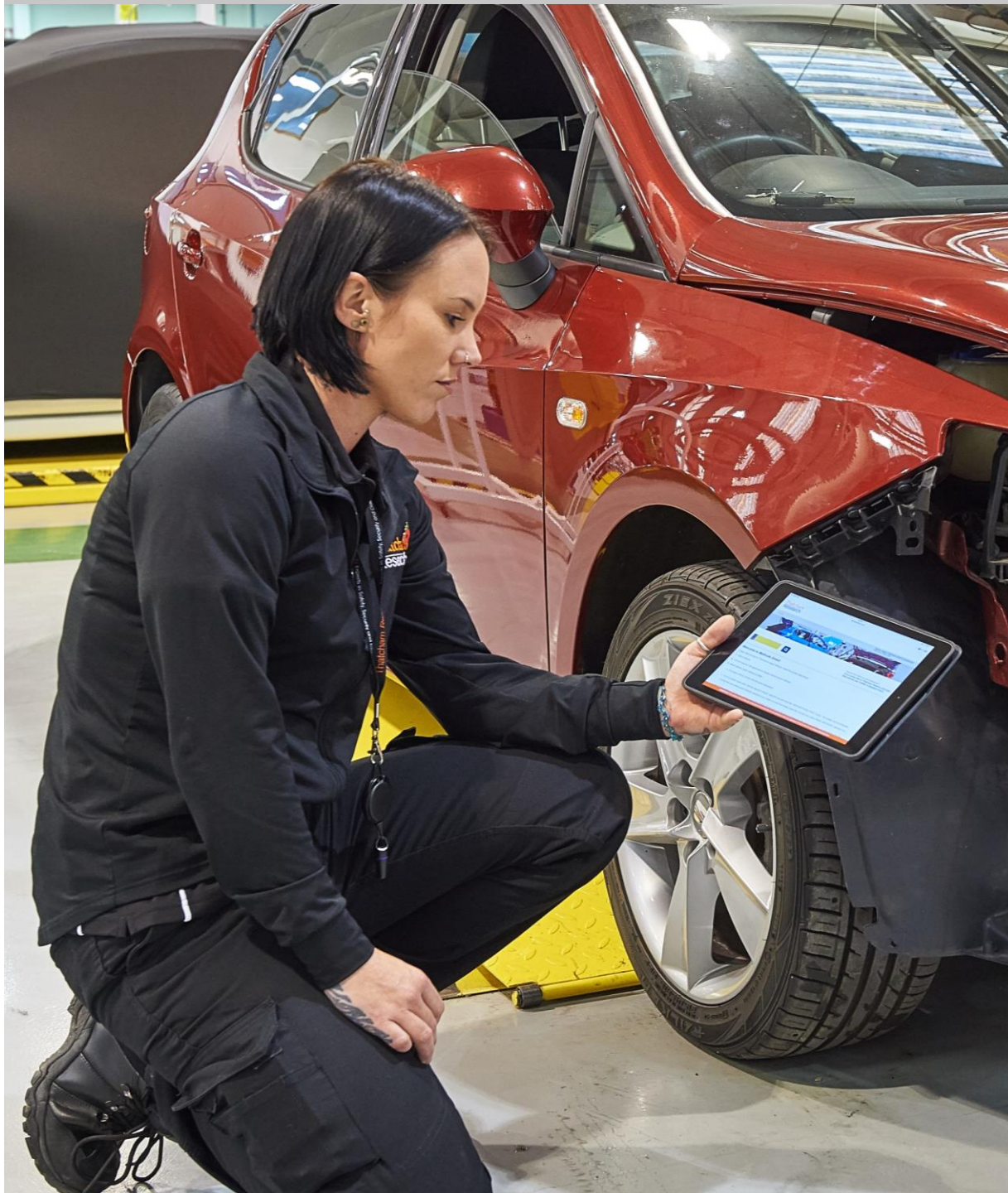
- Insight
- Safe repair guidance
- Influence - group rating
- Data
- Training

**Fitment, Guidance, Cost**



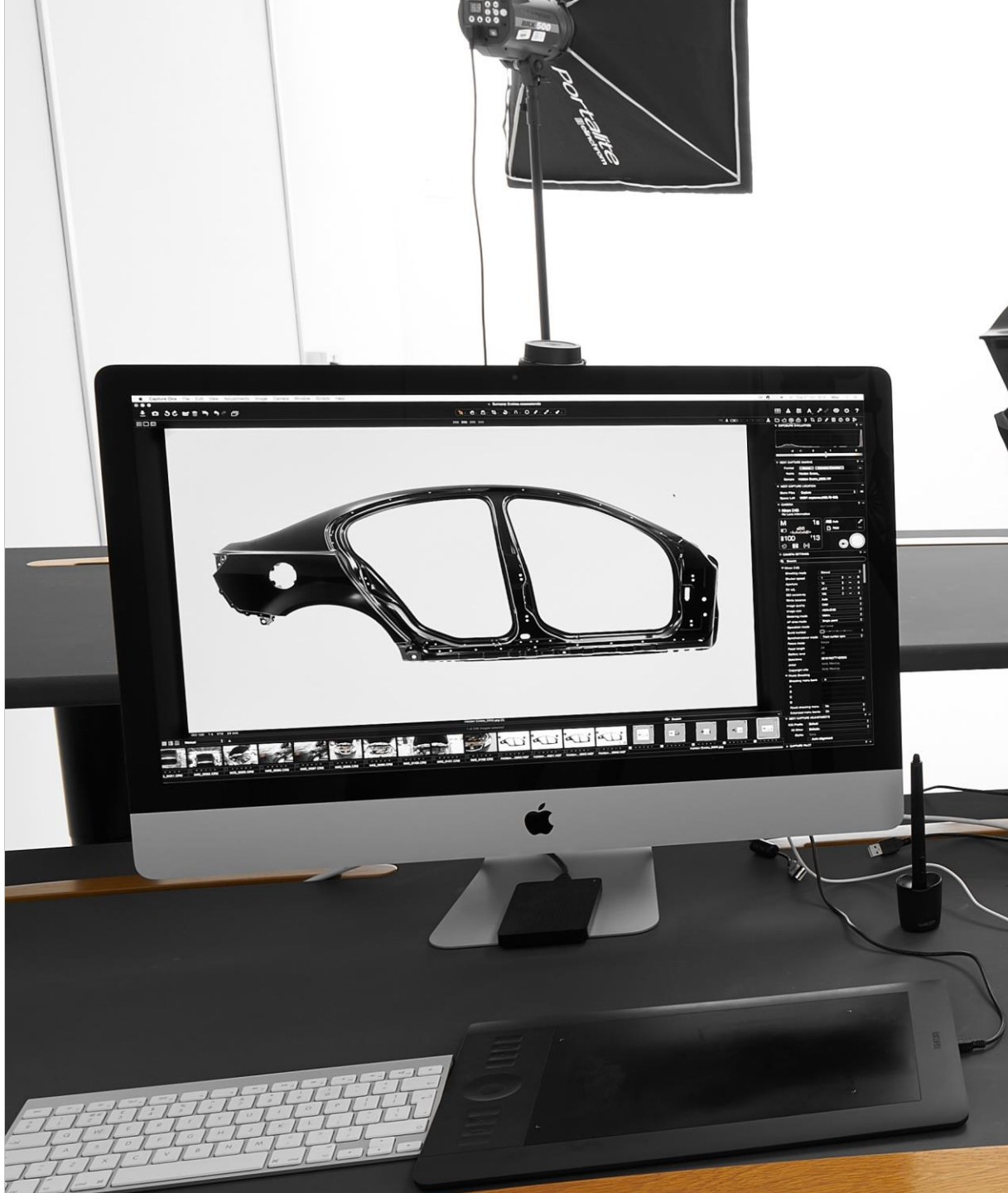
# Fitment

- Triage
- Identification
- Standard & optional fitment
- Actual fitment
- Estimating & repair
- Quotation & underwriting



# Guidance

- Clear repair methodology
- Training & certification
- Cost & resource identification
- Safe repair process
- Vehicle safety



# Cost

- Reasonable cost position
- Parts pricing
- Repair vs replace
- Aftermarket repair
- Damagability

# Summary

- New technology provides benefits but also challenges
- Repair scope expanded not replaced
- Manufacturers must support new technology over life-cycle
- The future is now!


Thatcham
Research
1707ENF
FOR SAFER CARS
EURO NCAP
Thatcham
Research
SAFER CARS. FEWER CRASHES

# Thank you

# Session 2 – Luke Penn, Kwik Fit

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# Kwik Fit

## BVRLA Forum

## 6.2.20

# BVRLA Forum

## 6.2.20

- **Marketplace**
  - 2019 / 2020
  - Future projections and forecasts
- **Capacity**
- **Real Life Experience**
- **Investment and Infrastructure**

Kwik Fit

# Marketplace

## Year to date

| | YTD 2019 | YTD 2018 | % change | Mkt share -19 | Mkt share -18 |
|---|---|---|---|---|---|
| **Diesel** | 583,488 | 746,332 | -21.8% | 25.2% | 31.5% |
| **Petrol** | 1,498,640 | 1,466,024 | 2.2% | 64.8% | 61.9% |
| **BEV** | 37,850 | 15,510 | 144.0% | 1.6% | 0.7% |
| **PHEV** | 34,734 | 42,232 | -17.8% | 1.5% | 1.8% |
| **HEV** | 97,850 | 83,528 | 17.1% | 4.2% | 3.5% |
| **MHEV diesel** | 32,217 | 3,833 | 740.5% | 1.4% | 0.2% |
| **MHEV petrol** | 26,361 | 9,688 | 172.1% | 1.1% | 0.4% |
| **TOTAL** | **2,311,140** | **2,367,147** | **-2.4%** | 9.8% (+3.2%) | |

**BEV** - Battery Electric Vehicle; **PHEV** - Plug-in Hybrid Electric Vehicle; **HEV** - Hybrid Electric Vehicle, **MHEV** - Mild Hybrid Electric Vehicle

**10% of all vehicle registrations in 2019 were AFV. Approx. 50% growth YOY**

Kwik Fit

# Future Marketplace

- **Short: 0-3 Years: Forecasted AFV market share**
  - 13.4% by 2021
  - 17.2% by 2022

- **Mid: 3-6 Years: Outlook**
  - ICE to significantly decline in vehicle sales (worldwide) from 2024
  - AFV's to triple in vehicle sales (worldwide) by 2025

- **Long: 6-10 Years**
  - Outright ban on fossil fuel emitting vehicles across multiple nations
  - EV sales to consolidate at around 45% of worldwide vehicle sales (10-15 years)

***"Government to speed up ban on fossil fuel vehicles from 2040 to 2035 in line with other nations such as the Netherlands, Ireland, Denmark and Sweden"***

***Now including Hybrids!***

# Capacity

Kwik Fit

# Distribution

- **11 Stapletons warehouses**
  - UK's largest tyre wholesaler stocking 1.5m tyres
- **Circa 750,000 tyres in centres**
- **89% of centres receiving 2 deliveries per day & 96% receiving a Saturday delivery**
- **Homologated Hybrid and EV Tyres from all premium brand manufacturers currently in stock across multiple SKU's – Heavily OE-fit driven at present**

Kwik Fit

# Capacity – Training Approach

**IMI Technical Training - 3 levels of qualification:**

- **Level 1 – Awareness:** Typically this level is suitable for valeters, drivers and staff who interact with the vehicle, but don't work on it directly
  - **Kwik Fit product capability: Tyres, MOT, Bulbs, Wipers, Alignment**
  - **4000+ Technicians trained**

- **Level 2 – Working around:** This is suitable for technicians working on the vehicle, but not directly on the HV system (or emergency services/recovery)
  - **Kwik Fit product capability: All SMR with the exception of HV system and some air-con restrictions**
  - **300 Technicians trained**

- **Level 3 (or higher) Working on HV Systems** – this is for technicians who are working directly on the HV system and its components. Level 4 includes working on HV vehicles when live
  - **Kwik Fit product capability: Not in scope currently**

# Real Life Experience

Kwik Fit

# Hybrid and EV - Tyres

- **Market for Hybrid / EV tyres is not yet fully evolved**
  - Dealer and aftermarket tyre availability currently relies on OE fitment
  - We are *starting* to see tyre manufacturers produce tyres for secondary fitment market
  - But consumer will, most often, not have a choice of tyre brand in the current market

- **Different requirements AFV tyres**
  - Lower rolling resistance
  - Lower Road Noise requirements
  - Greater load bearing characteristics
  - Tyres are taking higher torque at lower speeds
  - Critically – for the marketplace – these factors are dictating that AFV's have unique sizes
  - Examples – 175/60Q19 or 155/70Q19
  - *In these tyre size descriptions, Q means Quiet*

# Hybrid and EV - Tyres

**Complexity and Tyre Availability**

- Having a range of new tyre sizes for AFV market presents logistical challenges
- Post-OE availability – from tyres manufacturers - is often “imperfect” initially
- Sheer range of sizes now available presents logistical challenges
- Tyre retail outlets cannot hold every tyre that a drive-in customer might require on a given day
- *This problem will get worse before it gets better – 10-15 years as market migrates from ICE to AFVs*

**Consumer challenges**

- Potential for availability issues
- Cost
- Wear rates
  - initial data sets suggest AFV vehicle tyres are giving lower wear-rate longevity
  - albeit based on a relatively small data set

# Hybrid and EV - SMR

## AFV MOT

- Non-AFV first time MOT pass rate 2019 – 85.8%
- BEV, PHEV first time MOT pass rate 2019 – 90.9%
- EV first time MOT pass rate 2019 - 95.5%

## AFV Servicing and Maintenance

- ICE based AFV's similarity in service specifics
- EV Service schedule more akin to a health check
- Availability of parts in to the aftermarket is *starting* to fall in line with 12-24 months parameter

# SMR – Data and Parts

## NISSAN LEAF ACENTA

VIN: SJNFAAZE1U0004211 Bhp: 147.5
Reg Date: 16/07/2018 Engine Code: EM57 40KWH

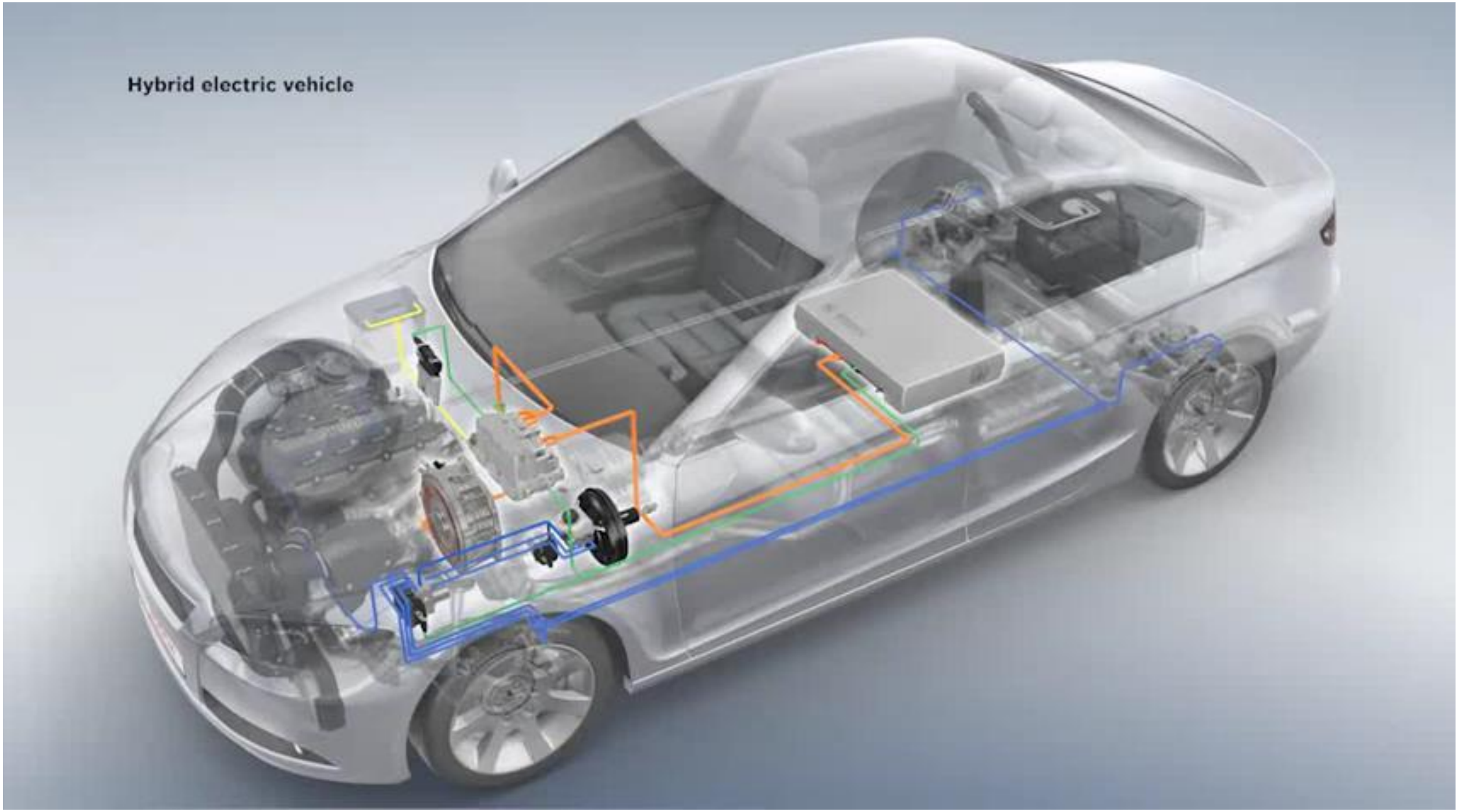
| Additional Service Items | |
|---|---|
| Braking system: renew the brake fluid *(every 24 months)* | ☐ |
| Cooling system: renew the coolant/water with anti-freeze *(first change at 54,000 miles/60 months; then every 36,000 miles/48 months)* | ☐ |
| Check the body for corrosion and damage *(every 12 months)* | ☐ |
| Renew the dust and pollen filter *(every 18,000 miles/12 months)* | ☐ |

**Standard Service Times**

- Service 1 – 0.4 / 0.7
- Service 2 – 0.4 / 0.9
- Service 3 – 0.4 / 1.2

**Parts Availability**

| MAKE | MODEL | DERIVATIVE | CABIN FILTER | FR PADS | FR DISC | R PAD | R DISC |
|---|---|---|---|---|---|---|---|
| TESLA | MODEL 3 SALOON | Performance AWD 4dr Auto | N | N | N | N | N |
| TESLA | MODEL S HATCHBACK | 307kW 90kWh Dual Motor 5dr Auto | Y | Y | Y | Y | Y |
| TESLA | MODEL X HATCHBACK | 449kW 100kWh Dual Motor 5dr Auto | N | Y | Y | Y | N |
| AUDI | E-TRON ESTATE SPECIAL EDITIONS (2019) | 300kW 55 Quattro 95kWh Launch Edition 5dr Auto | Y | N | N | Y | Y |
| HYUNDAI | IONIQ ELECTRIC HATCHBACK | 88kW Electric Premium SE 28kWh 5dr Auto | Y | N | N | Y | N |
| NISSAN | LEAF HATCHBACK | 110kW Acenta 40kWh 5dr Auto | Y | Y | Y | Y | Y |
| JAGUAR | I-PACE ESTATE | 294kW EV400 HSE 90kWh 5dr Auto | Y | Y | N | N | Y |
| BMW | I3 HATCHBACK | 135kW S 33kWh 5dr Auto [Loft Interior World] | Y | Y | Y | Y | Y |
| HYUNDAI | KONA HATCHBACK | 150kW Premium 64kWh 5dr Auto | N | Y | Y | N | N |
| VOLKSWAGEN | GOLF HATCHBACK | 99kW e-Golf 35kWh 5dr Auto | Y | Y | Y | Y | Y |
| | | | 70% | 70% | 60% | 70% | 60% |


Hybrid electric vehicle

# Hybrid and EV - SMR

## PHEV, BEV, MHEV (ICE) - Brake Wear

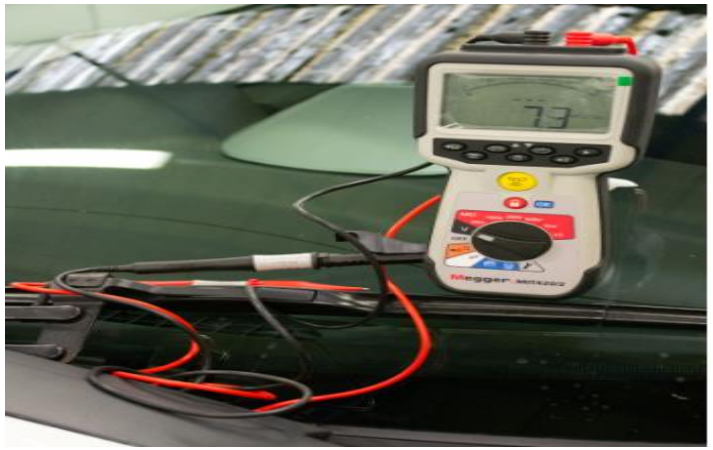
- Front brake pads wear improvement of approx. 80% vs. non AFV
- Front brake discs wear improvement of approx. 150% vs. non AFV
- Rear brake pads wear improvement of approx. 120% vs. non AFV
- Rear brake discs wear improvement of approx. 200%+ vs. non AFV

## EV - Brake Wear

- Front brake pads wear improvement of approx. 150% vs. non AFV
- Front brake discs wear improvement of approx. 250% vs. non AFV
- Rear brake pads wear improvement of approx. 180% vs. non AFV
- Rear brake discs – no data!

# Investment and Infrastructure

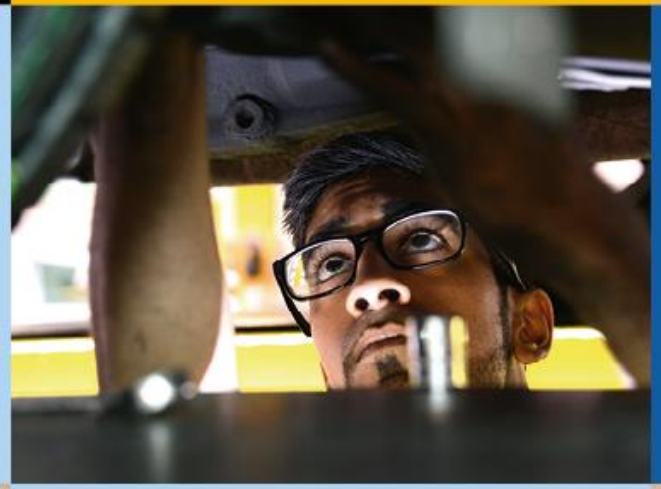
# Kwik Fit's Approach – Equipment



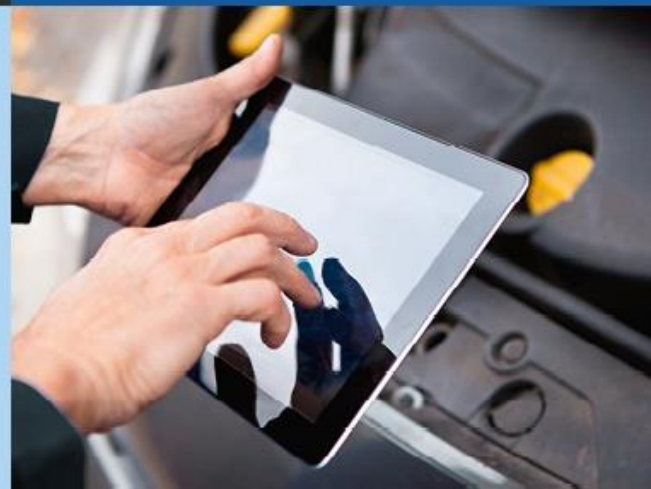

# Kwik Fit's Approach – Infrastructure

- **ULEZ and CAZ 2020 - 2022**
  - ULEZ expansion
  - Birmingham, Derby, Leeds, Nottingham, Southampton
- **Centres in Focus**
  - 52 Kwik Fit centres / 1 x Stapletons hub in current ULEZ/CAZ areas
- **Current Considerations**
  - Charge points
  - Ride share vehicles on site


KwikFit




BATTERY



# Coffee Break – back at 11:35 please

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# Session 3 – George Georgiou, SureTrak Ltd

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SureTrak

# BVRLA
# Technical & Operational Management Forum

Powerful solutions
for today's Insurer

SureTrak
*Intelligent Salvage Solutions*

# Who We Are

SureTrak is the industry's first salvage management platform combining cognitive predictive analytics, vehicle profiling algorithms and a multi-vendor supply chain to create a unique Total Loss Triage Solution.

SureTrak seeks to revolutionise the out dated "one size fits all" salvage models of today which have been heavily monopolised and provide our insurer & fleet partners with strategic control of their salvage, both commercially and operationally.

Put simply, SureTrak aims to put the power back in the hands of insurers and fleets in all aspects of their Total Loss supply chain.

SureTrak
Intelligent Salvage Solutions

# Green Parts Supplier Viewpoint

What are Green Parts?

Green Parts are recycled genuine OEM parts harvested from vehicles which have been retired from the public highway.


SureTrak
Intelligent Salvage Solutions

# Green Parts Supplier Viewpoint

Why should Fleets use them?

1. Reduced costs – Up to 55% discount on RRP.

2. Increased legislation and CSR focus on sustainability and carbon footprint.

3. Reduced repair cycle times for vehicles with back ordered parts supply from manufacturers.

SureTrak
Intelligent Salvage Solutions

# Green Parts Supplier Viewpoint

Any considerations for rental or leasing companies?

1. Homogeneity of fleets allows for closed loop self fulfilment, increasing green parts penetration from your own early termination vehicles.

2. Provides provenance assurance.

3. Sweats your assets further.

SureTrak
Intelligent Salvage Solutions

# Green Parts Supplier Viewpoint

General considerations:

1. Repairer buy-in – Green parts carry a stigma with bodyshops historically encountering delivery delays and wrong or damaged parts being delivered.

2. Supplier buy-in – Foreign competition has forced UK dismantlers to pay more for salvage, from which they must extract maximum value to earn a profit. With the internet now bringing direct access to a wider retail market with no access to trade discounts and increased premiums in the event of an ‘at fault’ claim. Any scalable green parts proposition would have to come with a commitment from UK motor insurers to feed the British dismantling industry.

SureTrak
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# Green Parts Supplier Viewpoint

How do you go about using/specifying them?

Choose a right green parts supplier, who can:

1. Understand your parts usage frequency – Green parts will never be an absolute substitute to new given its finite supply.
2. Triage early termination vehicles to a national network of ATF's for processing.
3. Ring-fence harvestable frequently used parts from both your own and other early termination vehicles.
4. Maintain accurate & robust inventory systems to ensure correct parts matching and provenance trail.
5. Ensure that all parts are carefully inspected through a stringent quality control procedure, from removal to storage to shipping.
6. Adhere to manufacturer service levels including parts guarantee.

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# SureTrak

*Intelligent Salvage Solutions*

# Session 4 – Nick Rossiter, Allianz Claims

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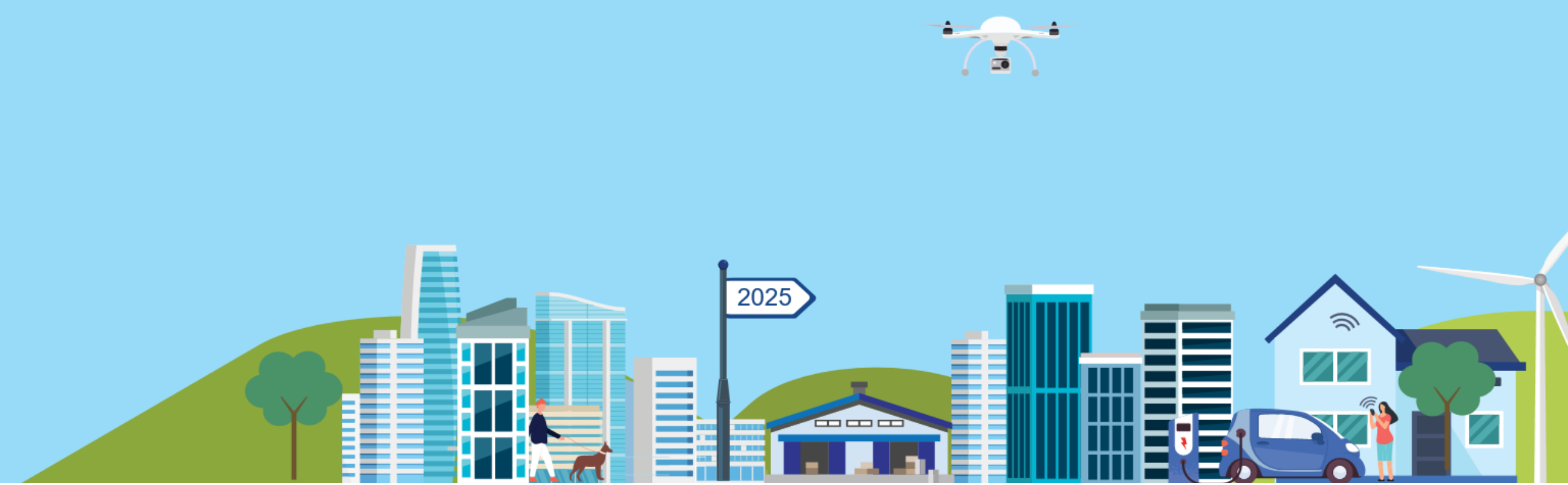
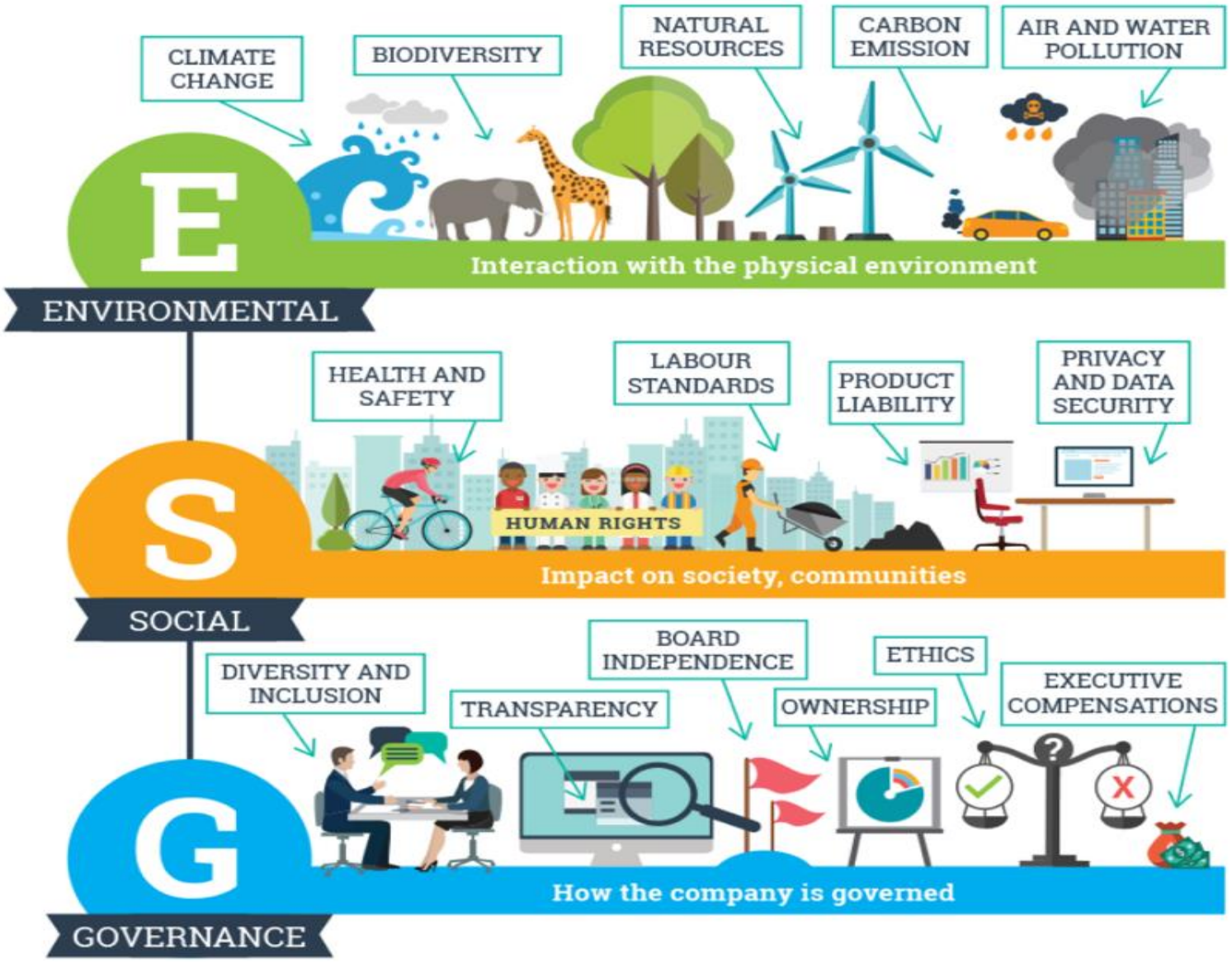



# Green Parts – an insurer viewpoint

Nick Rossiter, Motor Damage Strategy Manager

Allianz

# WHY WE WANT TO USE GREEN PARTS



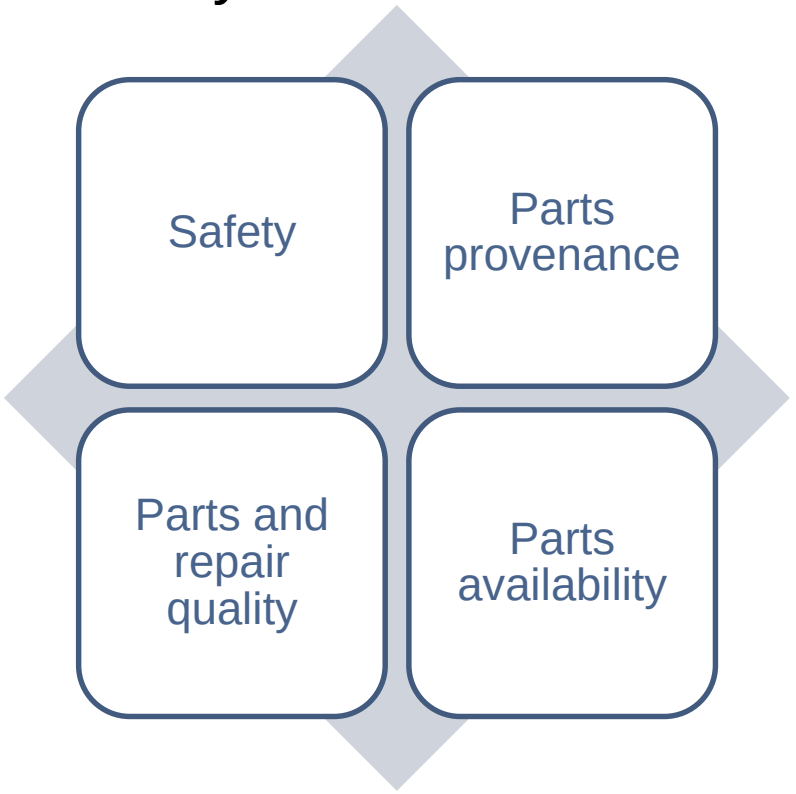

- Responding to customer expectations
- Preventing avoidable waste
- Reducing delays in the repair process
- Total loss avoidance
- (Limited) repair cost savings

# HURDLES, PITFALLS & FINDINGS FROM OUR PILOT

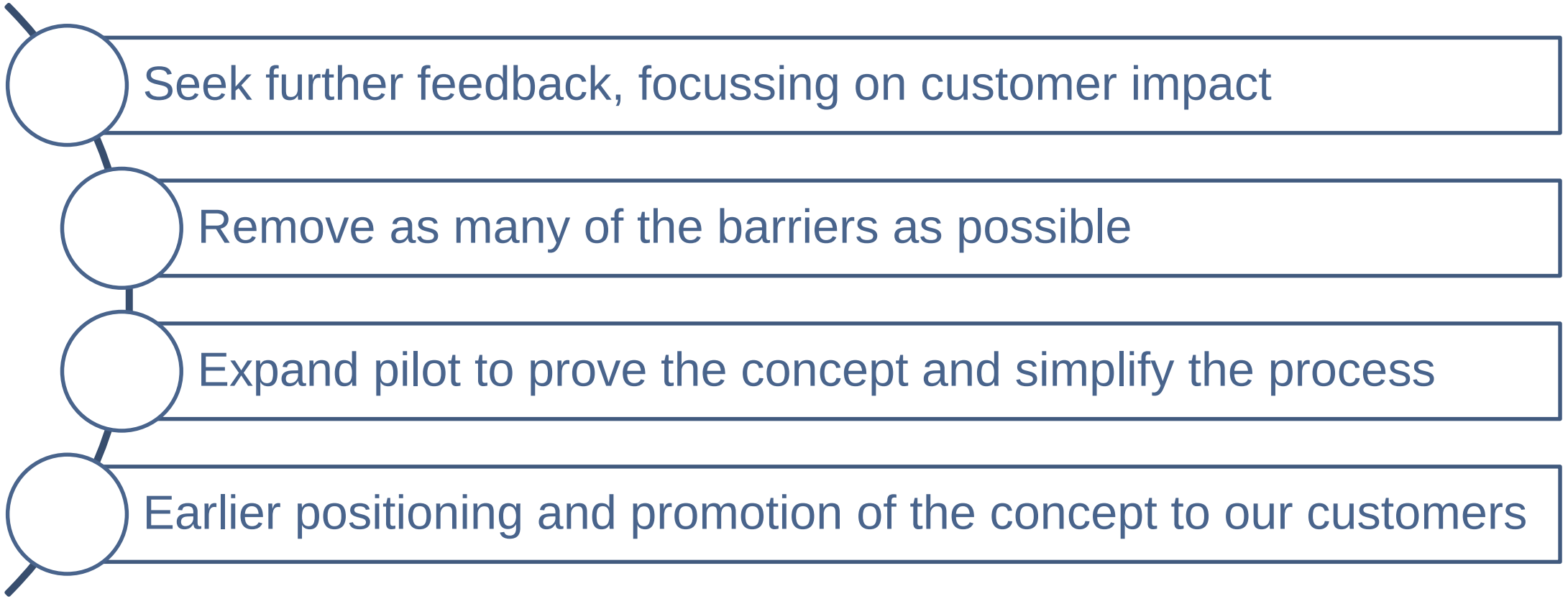
Our approach: using eleven pilot sites, we've asked each customer/driver if they will consent to the use of green parts as we repair their vehicle

| | |
|---|---|
| Top 3 reasons why customers have declined | Contact does not have the authority to agree (commercial customers) |
| | Concerned about returning vehicle to lease company |
| | Belief that repair quality will be compromised |

Key considerations



# NEXT STEPS


Seek further feedback, focussing on customer impact
Remove as many of the barriers as possible
Expand pilot to prove the concept and simplify the process
Earlier positioning and promotion of the concept to our customers

# BVRLA Policy Update

Catherine Bowen & Thomas McLennan

TOM Forum, 6 February 2020

# Air Quality – Long-term objectives

## A consistent national air quality strategy and policy framework that is supported by local authorities and enables BVRLA members to:

### Support businesses and individuals in **upgrading to low-emission vehicles**

- **Engage** with local and national decision makers to ensure that clean air policies are pragmatic, workable and properly supported
- **Promote the role** that leasing, rental and car club members can play in providing access to affordable compliant vehicles

### Support businesses and individuals in **changing their transport behaviour**

- **Research and promote** innovative policy initiatives that can help drive transport behaviour change in clean air cities
- Use BVRLA **research and communications** to demonstrate the sustainable urban transport credentials of the vehicle rental, leasing and car club sector

### Support businesses and individuals in **moving to zero emission road transport**

- **Review existing zero emission policy**, analyse progress made and hold policymakers to account
- **Formulate recommendations** to help inform long term zero- emission policy making

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# Air Quality workstream in 2020

- **Consultation responses –** Green Number Plate, Oxford Zero Emission Zone (Dec 20) and Committee on Climate Change – Sixth Carbon Budget
- **Clean Air Zones** – Birmingham & Leeds July 2020, Bath November 2020. Consultations pre purdah
- **Payment Portal** – no autopay!
- **Low Emission & Zero Emission Zones** – scrappage scheme promotion ULEZ, opportunities in other cities?
- **Car bans** – Cars in The City factsheet & local engagement
- **New Air Quality Working Group –** mandate on how best to promote the sector and advise on positioning, engagement strategy with local and national government
- **Diesel ban –** Bristol. Will legislation be passed?
- **Electric Vehicle support –** EV Energy work May 2020, Plug-in Pledge update at Parliamentary Reception, Plug-In Grant campaign, 2035 target and opportunity to engage/inform

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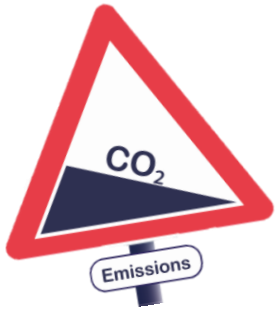




# Future Mobility – Long-term objectives

**A consistent national policy and regulatory strategy and policy framework that supports new business models and delivers cleaner, cheaper safer and more reliable journeys by:**

## Providing the **skills** needed to repair, service and maintain electric, connected and autonomous vehicles

- **Research** to identify key skills-related concerns amongst members
- Engage with members and stakeholders to assess automotive aftermarket capabilities and address any issues
- **Collaborate** with Thatcham to assist its ADAS repairs training and accreditation

## Creating a **fair and competitive environment** for mobility services

- **Engage** with regulators and policymakers to ensure equal treatment in terms of tax, regulatory environment and customer protection requirements and to push for competition law changes
- **Analyse** Digital Parking and ability to reduce cost, congestion, and unnecessary parking fines
- **Explore** opportunities to work with other automotive stakeholders to develop and implement connected vehicle data use cases

## A **roadmap for urban transport** behaviour change

- **Develop** a national framework that provides flexible, practical support for local policymakers
- **Research and promote** innovative policy initiatives that can help drive urban transport behaviour change
- **Collaborate and engage** with other stakeholders looking at Future Mobility policy

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# Future Mobility workstream in 2020

- **Consultations responses** – Law Commission – Autonomous Vehicles
- **Peer to Peer –** research completed and shared for feedback to determine next steps
- **Mobility Credits –** Due to launch in Coventry, potential further trials, manifesto ask for funding
- **Vehicle Data –** creating a fair and competitive market for mobility services - member engagement, meetings with CCAV & DfT, engagement with Leaseurope, Motor Vehicle Block Exemption Regulation
- **Skills** – providing the skills and aftermarket capacity needed to repair, service and maintain electric, connected and autonomous vehicles. Engagement with industry partners. Keen to obtain feedback from members on areas of concern and how BVRLA can support

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# Taxation – Long-term objectives

**A fair and well-signposted motoring tax regime that recognises the role that BVRLA members can play in delivering cleaner, cheaper, safer and more reliable transport. The key focus will be to:**

## Secure **a fair deal** for **company car drivers and businesses**

- **Continue to engage** with HM Treasury and parliamentarians to influence a positive outcome with the implementation of WLTP
- **Use BVRLA research and communications** to demonstrate the impact that a rising BiK and VED burden will have on drivers and members' businesses
- **Collaborate** with members and other stakeholders to strengthen campaign messages ahead of the 2020 Budget submission

## Accelerate the **upgrade towards zero emission vehicles**

- **Engage** with policymakers to develop a medium-term tax strategy that can drive rapid take-up of electric vehicles with the fleet sector

## Develop a **fiscal roadmap** that supports the deployment of increasingly connected, autonomous, shared and electric vehicles

- **Collaborate** with relevant stakeholders to influence HM Treasury thinking on the development of future motor taxation
- **Produce insightful research** that helps inform long term motor taxation policy
- **Engage** with government to ensure long term policies fit with the fleet investment cycles to prevent any adverse impact and seek a national framework to guide the interaction of local charging schemes

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# Taxation workstream in 2020

- **WLTP –** Questions remain on modified vans and UEV range definitions
- **Consultations in Q1/2**– VED – call for evidence expected
- **Long –term taxation –** Road Pricing position to be developed, further steering group meetings, potential research requirement, select committee enquiry due to launch Q1
- **Medium-term taxation research –** Cambridge Econometrics due to complete work in Q1
- **Budget and Spending Review** – Submission due by Friday 7th February
- **Company Car research** – Due to launch Q1
- **Manifesto asks** – Plug-In Grant, Company Car Roadmap, VED Surcharge

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# Workshop Session

With your facilitator and other delegates, please discuss operational issues affecting your business – the aim being that the BVRLA would look to address these issues in future events and training where appropriate.

Coloured dots indicate which group you have been assigned to.

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# Brand Partnership Opportunities

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# Final Thoughts

- Thank you to the Institute of the Motor Industry for hosting today's forum
- Thank you to our speakers and you for participating in today's forum
- **TOM Feedback & Suggestions**: Please spend a few minutes to complete the feedback survey when you receive the email
- **Presentations**: a link to where you can download these will be sent out
- See you next time! 4 June 2020

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# Technical and Operational Management Forum

6 February 2020

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