

Accelerating Electrification in India

Battery Sharing in India: NRI India's Approach to Go-To Market Strategy

NRI Consulting & Solutions India Pvt. Ltd.

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Accelerating Electrification in India: NRI India's Role

Background

- The Indian automobile industry has seen a **paradigm shift in fuel technology** in the last 2 decades – from ICE (Internal Combustion Engines) run on petroleum-based fuels to electric motors-based EV technology
- Industry players have also warmed up to the promise of EVs in India. The **2-W and 3-W space** in particular is witnessing a **sudden rise in electrification in shared mobility and commercial applications**

NRI India Expertise

- NRI India has a **rich experience of xEV-themed projects** across the value chain from business strategy to GTM strategy creation, Proof of Concept planning & execution, Partner search & collaborations
- NRI India's current focus on xEV themes has led to supporting leading global clients in the Automotive industry

NRI India's GTM Approach

- NRI India has created an **end-to-end solutions from strategy to implementation** for undertaking **GTM Strategy for launch of battery sharing service in India**, via:
 - 1 Business Feasibility Study
 - 2 Concept Validation through Pilot Execution
 - 3 Commercial Launch

With industry & functional expertise in CASE*, NRI India has undertaken ~16 xEV projects, incl. GTM strategy for global OEM for battery sharing service launch

NRI India provided End-to-End Solution

Strategy

Planning & Implementation

1

Business Feasibility Study

Market study & Feasibility assessment for 3W Battery swapping business: from as-is situation to deployment

A Market Potential

3W Market study, User survey, battery demand analysis and estimation

B Regulatory & Compliance Checks

Effect of regulations, taxation, Govt. incentives on business profitability for various stakeholders

C Profitability Assessment

Ecosystem profitability assessment, business profitability forecasting

D Network Planning

Evaluation of locations, distribution of swapping infrastructure

2

Concept Validation through Pilot Execution

Managed Planning & Implementation to test technical and business feasibility of pilot before the commercial launch

A Pilot Preparation

OEM-Partner role finalization & negotiations, compliance check and regulations study

B Pilot Launch

Partner coordination, business plan creation, vehicle dev. & on ground setup support

C Pilot Implementation

Operations planning & management, SOP & training material, support during critical situations

D Pilot Analysis

Issue escalation, reporting & documentation, key learnings, service improvement suggestions

3

Commercial Launch

Managed Planning & Implementation for Commercial launch of battery swapping solution

A Market Assessment

Launch plan finalization basis market study and competitive analysis, demand/traffic surveys

B Business Planning

Customer identification & marketing strategy, location finalization, company incorporation setup

C Partner network evaluation, selection and contracting

Partnership development with OEMs, Infra players, DISCOMs, O&Ms, Financiers, etc.

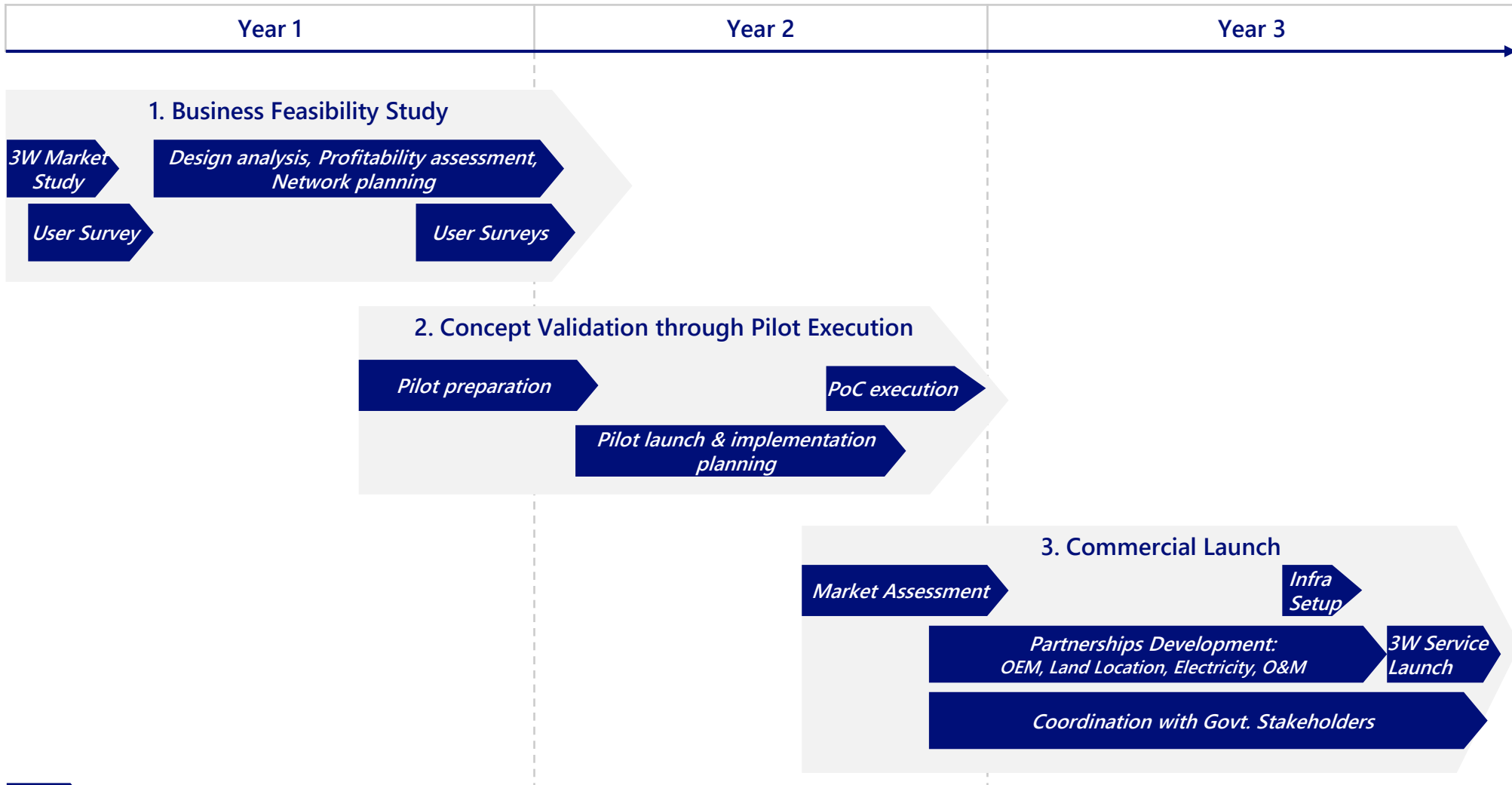
D Relationship Development & Liasoning with Govt. Stakeholders

Grants and subsidies evaluation, implementation support for approvals

GTM Timeline

NRI India offers end-to-end solution in the form of GTM strategy, spanned planning and subsequent implementation over a span of 3 years

Execution Timeline for E-3W Battery Swapping Solution Development



1 Business Feasibility Study

In the initial phase, NRI India assesses the battery sharing potential, undertaking regulatory & compliance checks & network planning, to arrive at a deployment plan

Business Feasibility Study

*(To create a City-wide
Deployment Plan)*

1

Market Potential

Overall market study, city-wise demand estimation

2

Regulatory & Compliance Checks

Effect of regulations, taxation, Govt. incentives on business profitability for various stakeholders

3

Profitability Assessment

Determination of most feasible business model and operating scenario

4

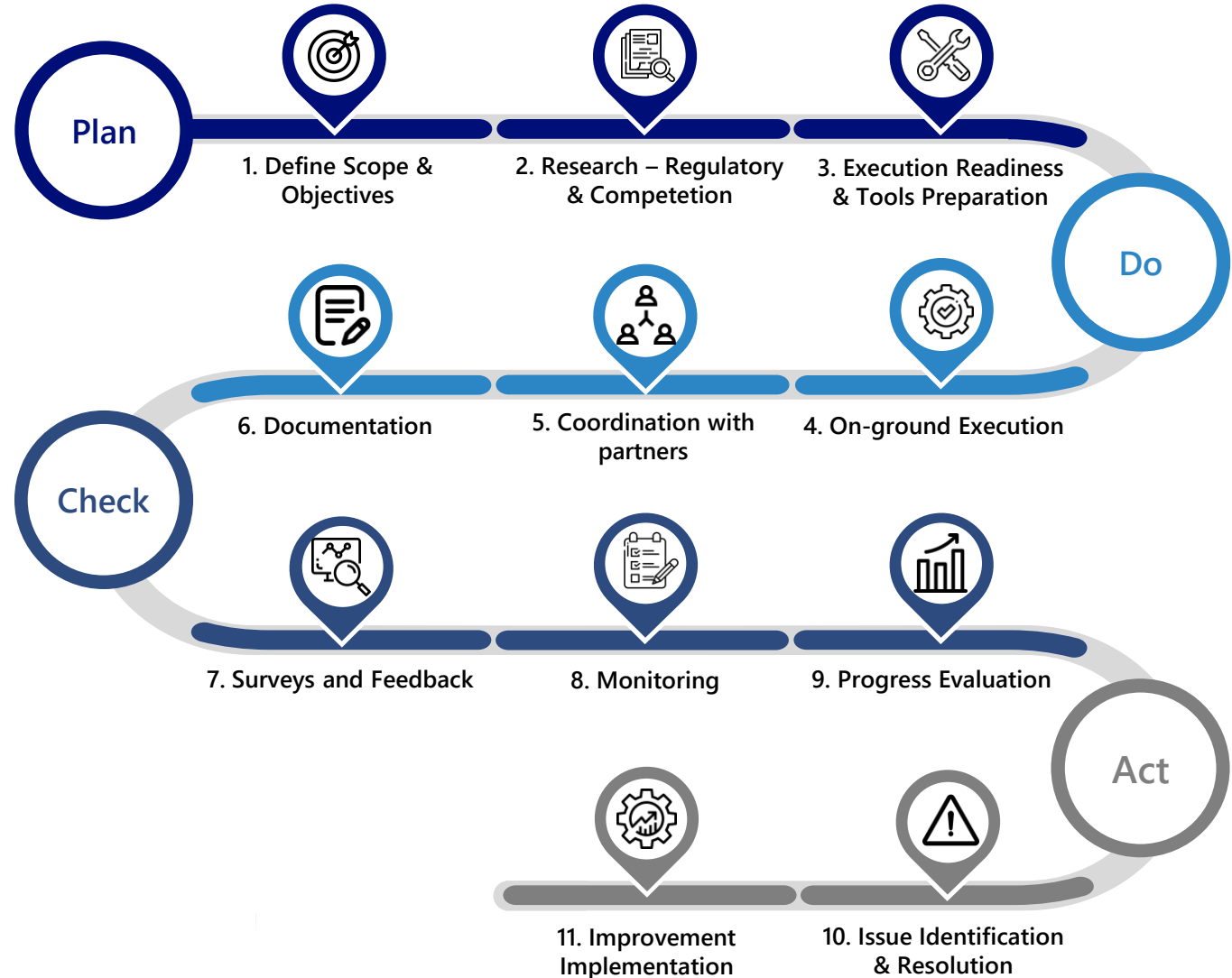
Network Planning

Location assessment and planning for swapping infrastructure

2 Concept Validation through Pilot Execution

For smooth execution of PoC, NRI India has developed a comprehensive approach to assist key stakeholders & gathered learnings for commercial launch

Pilot / Proof of Concept (PoC) Execution



3 Commercial Launch

Based on key learnings from PoC, NRI India has developed an end-to-end strategic plan for implementation of battery swapping business set-up

Strategic Planning

Market Assessment



- Market Study & Demand Analysis
- Competitive Landscape and Ecosystem Analysis
- Growth path & Launch plan finalization

Business Planning



- Customer Identification & Marketing Strategy
- Regulations Checks & Tax & Legal Assessment
- Operational Planning (Commercial Practices)
- Company Incorporation Setup

Partner Network Evaluation, Selection & Contracting



- Identification & Evaluation of 100+ Potential Partners across 15+ Service Areas
- Partner Contracting & Coordination

Relationship Development & Liasioning with Govt. Stakeholders



- Discussions on Swapping Business & Liasioning with Relevant Govt. Agencies
- Evaluating & Availing Grants & Subsidies
- Implementation Support

Implementation

Our CASE* / New Mobility Team

NRI India's new mobility team consists of a blend of Consulting & Industry veterans with expertise across 16 xEV-themed engagements over the past 3 years

xEV Automotive Consultants and Key Leaders

OUR TEAM

20 Consultants

Themes

- Brand Management (Connected Services/ Digitization)
- Business Strategy (Go-to Market Strategy/Customer Engagement)
- Product Launches
- Product Marketing
- Technology Strategy
- Analytics & Consumer Insights
- Policy Analysis
- Sales Strategy

Industry Expertise


- Automotive
- Electric & Shared Mobility
- Manufacturing
- Energy & Infrastructure
- Retail
- Consumer products
- Luxury Consumer goods
- Technology
- Supply Chain & Fulfilment

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* CASE = Connected, Autonomous, Shared, Electric

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