The Director's Atlas

Sector Outlook



Market size and valuation

- ~US$1.6-2.0 bn, CY2025 estimate
- Electric two-wheeler retail sales
- 1.28m registrations; up 11.4%

Primary economic engine

Urban commuter scooters, gig-fleet delivery leases, battery swapping and Tier 2/3 dealer expansion drive demand.

Boardroom Focus

01 **Scale capacity and secure domestic battery supply**

02 **Localise motors, controllers and critical components**

03 **Build safe, connected vehicles and reliable service**

For Business, Finance and Function Directors:
A starting point for roundtable conversations on growth, resilience and stakeholder alignment.

Transformations Our Programs Deliver

OUR COACH

For Business, Finance and Function Directors

Two outcomes	Foresight to lead through disruption. Influence to align stakeholders before action. Camera confidence, eloquence, vocal gravitas and a six-week peer network.

01 ENTERPRISE RESILIENCE

Foresight → Recognised Strategic Leadership

INSIDE YOUR COMPANY

Be recognised as the director who identifies structural shifts early and turns them into a clear agenda for investment and action.

OUTSIDE YOUR COMPANY

Build a reputation for judgement that clients seek by name, partners trust and competitors benchmark against.

02 STAKEHOLDER ALIGNMENT

Functional Authority → Enterprise-wide Influence

INSIDE YOUR COMPANY

Build a function backed by peers and the C-suite. Articulate ideas with clarity, eloquence and vocal gravitas, with confidence in the room and on camera.

OUTSIDE YOUR COMPANY

Be known for ethical influence and strategic judgement, supported by a trusted peer network built over six weeks.

Five paradigm shifts

What changes the basis of competition

01 Structural

Start-up-led expansion → established OEM scale and stronger dealer networks.

02 Technology

Imported packs → local assembly, LFP batteries and connected vehicle systems.

03 Evidence and trust

Launch claims → registrations, real-world range, warranties and service quality.

04 Economics

Subsidy-led demand → total ownership cost, financing and vehicle margins.

05 Socio-cultural

Early adopters → family commuters, women riders and gig-worker livelihoods.

FOR YOUR NEXT LEADERSHIP DISCUSSION

Which of these shifts could change your competitive position - and which is missing from your leadership agenda?

Opportunity & Disruption

Where value can move in electric scooters

01 Market opportunity

Long-range scooters, gig-fleet battery swapping, regional dealer hubs and connected dashboards.

02 Disruption

Reduced incentives, high purchase prices, battery-safety scrutiny and magnet supply constraints.

03 Sector impact

Price support compresses margins; certification and supply interruptions delay production and launches.

04 Strategic response

Localise motors and controllers, diversify magnet supply and expand fleet-focused battery swapping.

Opportunity → Disruption → Impact → Strategic Response

Sector Movement

Signals to fund, reshape or leave behind

EVOLVE

Reshape existing lines

Battery-swapping operators, EV powertrain suppliers, digital sales platforms and local component manufacturers.

SURGE

Scale emerging lines

Swap hubs, LFP battery-pack assembly, long-range scooters and connected vehicle services.

SHRINK

Reduce exposure

Import-dependent kit assembly and basic unconnected scooters; petrol scooters face share pressure.

SUNSET

Exit structurally weak models

Non-compliant vehicles, inefficient assembly workshops and unhedged component-import models.

FOR YOUR NEXT LEADERSHIP DISCUSSION

What should your business fund, reshape or stop - and where does the leadership team disagree?

Governance Agenda

Regulatory and board priorities

01 Regulatory drivers

- Vehicle approval, battery safety and battery-swap standards
- Incentive eligibility, localisation evidence and claim integrity
- Rider-data protection and connected-vehicle security

02 Board oversight priorities

- Scale manufacturing with battery safety and recall readiness
- Secure domestic cells, packs, motors and controller capacity
- Expand charging, swapping and dependable dealer service

Director's Future Role

Strategy, finance and operations

Strategy

Model incentive changes, local sourcing and the balance of retail and gig-fleet demand.

Transformation

Localise component lines and equip dealers for connected vehicles and battery swapping.

Finance

Improve vehicle margins, hedge imported inputs and manage battery warranty costs.

Risk & Compliance

Govern battery certification, incentive claims, recalls and critical supply concentration.

Operations

Improve assembly throughput, swap-network logistics and local supplier performance.

Supply Chain

Secure domestic cells, diversify magnet sources and localise motors and controllers.

FOR YOUR NEXT LEADERSHIP DISCUSSION

Are strategy, finance and operations working from the same assumptions about growth, investment and risk?

Director's Future Role

Commercial, customer and product

Quality & Excellence

Validate battery safety, investigate thermal events and test service quality and software updates.

Business Development

Expand Tier 2/3 dealers and secure fleet leases with quick-commerce and delivery operators.

Sales

Grow dealer and fleet sales, financing access and battery-swap partnerships.

Marketing

Demonstrate ownership-cost savings, verified range and safety through regional campaigns.

Client Experience

Provide service alerts, battery-health updates, swap support and dependable fleet uptime.

Product & Technology

Build long-range and swappable platforms with telematics, voice tools and battery management.

Director's Future Role

Data, people and governance

Data & Analytics

Analyse battery health, swap utilisation, dealer performance and demand scenarios.

Information Security

Secure vehicle telemetry, software updates, swap networks and personal rider data.

People & Culture

Recruit battery and mechatronics talent; develop EV assembly and dealer-service capability.

Learning & Development

Train technicians in battery and electrical safety, dealers in EV sales and teams in AI tools.

Legal

Protect vehicle software and battery IP; govern safety filings, contracts and data privacy.

ESG & Sustainability

Strengthen battery assembly safety, fire protection and worker health across factories.

Turn Sector Intelligence into Enterprise Action

For Business, Finance and Function Directors

Which business priority needs clearer direction or stronger support?

EXPLORE ROUNDTABLE THEMES

01 Enterprise Resilience

Turn disruption into growth with a financially grounded resilience roadmap.

02 Enterprise Transformation

Convert strategy into execution, ownership and measurable change.

03 Stakeholder Alignment

Move from functional authority to enterprise-wide influence.

Let others see the capability those closest to you already recognise.

Grow in confidence, express yourself with eloquence, and become more recognised for the value you bring.

REQUEST AN INVITATION

Discuss your priority on WhatsApp

Bring one live business challenge. Let’s explore which roundtable is relevant to your priorities.

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