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October 27, 2020 12:01 AM

# Ford's Oakville commitment could be the ground floor for Canadian EVs

DANA FLAVELLE

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Arkadiusz Kaminski

Arkadiusz Kaminski: "If Canada is ever going to have stability in the auto industry, we can no longer rely on foreign [automakers] running the show."

**EDITOR'S NOTE:** This is part two of a three-part Automotive News Canada series called *Electrifying Oakville*, which takes a closer look at the pledge Ford Motor Co. has made to electric vehicles and its only assembly plant in Ontario, and how that could affect the Canadian auto industry as a whole.

Electric vehicle startups in Canada see Ford's massive investment in its Oakville, Ont., assembly plant as a sign that the time is ripe for a Canadian-owned and Canadian-controlled EV brand.

"If Canada is ever going to have stability in the auto industry, we can no longer rely on foreign [automakers] running the show," said Arkadiusz Kaminski, founder and CEO of Toronto-based AK Motors. "At any moment they can pack up and leave," he said, citing General Motors' decision to stop production at its Oshawa, Ont., assembly plant at the end of 2019.

Ford plans to invest \$1.8 billion to retool its Oakville plant to build battery-powered vehicles, starting in 2024, a move that has drawn \$590 million in federal and provincial funding.

"It's a game changer," said Paul Rivera, CEO of Vancouver-based ElectraMeccanica Vehicles Corp. "It's a giant leap for the North American EV space, and it just goes to show once again that electrification is the path forward as transportation evolves."

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But Ford's move has also raised the stakes for start-ups that are going up against well-financed established brands.

ElectraMeccanica's response has been to focus on the U.S. market with a low-cost, niche product, a three-wheel, single-passenger vehicle aimed at short urban commutes and delivery companies.

The company began producing its first commercially available Solo EVs in China in August, Rivera said, and is looking to add a plant in the southern United States. Its partner in China, motorcycle maker Zongshen Industrial Group, has expertise in assembly and supply-chain management, while the three U.S. states vying for ElectraMeccanica's next investment, Florida, Tennessee and Arizona, all see EVs as a strategic industry, Rivera said.

But he didn't rule out future manufacturing in Canada.

"Is it possible to manufacture on a large scale in Canada? Absolutely. All options are still open long term."

### CONTRACT ASSEMBLY

AK Motors' Kaminiski said his game plan is to launch a low-volume, niche product in the \$150,000 range that would be marketed globally. He also is looking to the contract assembly model to build the Maple Majestic, the working title for the vehicle.

It makes sense to manufacture a Canadian brand in Canada, leveraging the country's deep bench strength in both information technology and global auto parts manufacturing, said Kaminiski, a former industrial designer with Spin Master Corp., a Torontobased global player in children's toys and entertainment.

"Toy companies don't necessarily have their own manufacturing plants. They rely on the factories of suppliers or companies that produce products for other companies. I believe that's a strategy that will work here," he said, referring to the business model that made Spin Master a US \$1.5 billion global enterprise.

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## LAUNCHING PAD

Like other start-ups in the EV space, AK Motors, a Polish-Canadian venture formed in 2012 to revive the classic Polish Syrena automotive brand, is still in the very early stages. Largely self-funded, its next step is producing a Canadian concept car that will attract potential partners and investors, Kaminski said.

That formula worked in Poland, where the company relaunched the Syrena brand, initially as an internal combustion engine car for the European race circuit, he said. He was also involved in a consortium developing an electric vehicle for that market.

AK Motors is just one of several EV start-ups eyeing Canada as a launching pad for a global business, said Colin Singh Dhillon, chief technology officer at the Automotive Parts Manufacturers' Association.

Some of the others, including Nika EV, Inc. and Haze Automotive, are still in what Dhillon described as "stealth" mode, providing little public information about their plans.

Nika EV Chief Operating Officer Jason Hughes declined to comment for this story, saying the timing wasn't right. Haze Automotive's Sean Mario Hazaray, an automotive software engineer whose LinkedIn profile includes stints at Karma Automotive, BMW and Subaru, was not available for an interview.

Unlike traditional automakers, these are technology companies with new ideas about how to address the mobility market, not just build vehicles, Dhillon said.

If Canada is serious about wanting its own EV brand, governments are going to have to step up with more financial support, Dhillon added.

Failure to act could lead to an exodus of Canada talent, cautioned Kaminski. "There's a lot at stake in developing a Canadian OEM."

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