

National ZEV Investment Plan Indiana Overview

10.07.2019



Our transformational opportunity: the largest single investment ever made in infrastructure, education and awareness, and access to drive ZEV adoption



Our Mission

Electrify America will be a catalyst for promoting ZEV adoption by offering transformative, customer-centric infrastructure and energy management solutions.

Our Company

Electrify America is a subsidiary of Volkswagen Group of America created to implement the \$2 billion ZEV Investment Commitment. We have recruited talent from across diverse industries.

Our Approach

Electrify America is a data-driven company committed to increasing the use of ZEV technology.

Electrify America was created to execute Appendix C, a component of the TDI consent decree with EPA and CARB

2.0 Liter Diesel Consent Decree Components

Appendix A/B:
fix/buy back cars

Appendix C:
*ZEV Investment
Commitment*

Appendix D:
\$2.9B NOx
mitigation fund

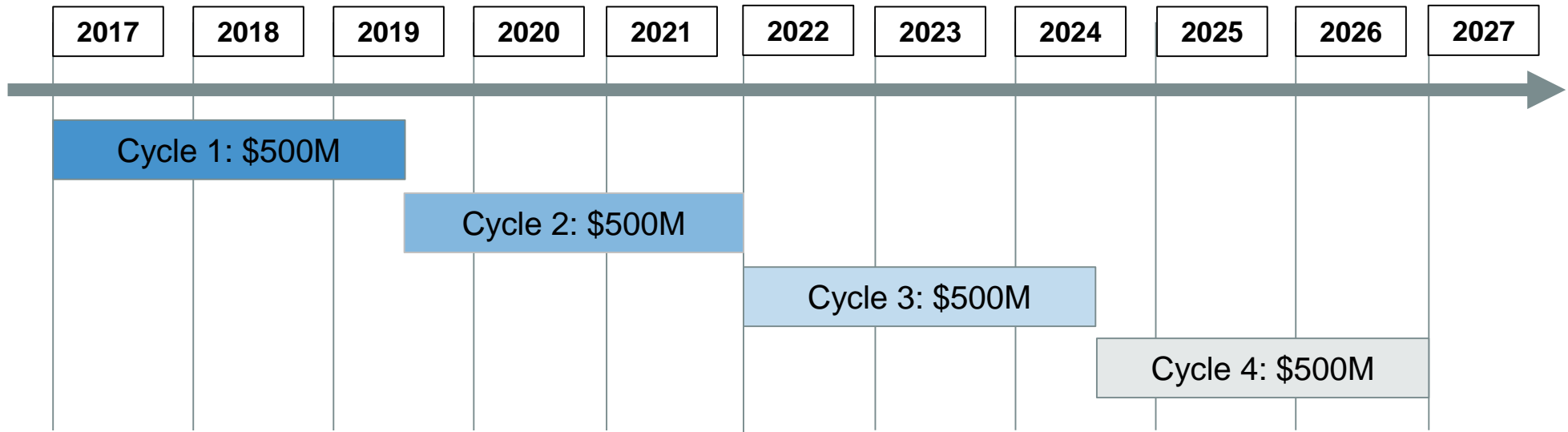
Appendix C:
*ZEV Investment
Commitment*

Goal:

- **\$2B total investment over 10 years**
 - \$500M per (4) 30 month cycle
 - \$1.2B National investment, EPA
 - \$800M in California, CARB
- **Increase ZEV adoption in U.S. through brand-neutral and self-sustaining ZEV investments**



Electrify America investments will be made over four 30-month cycles



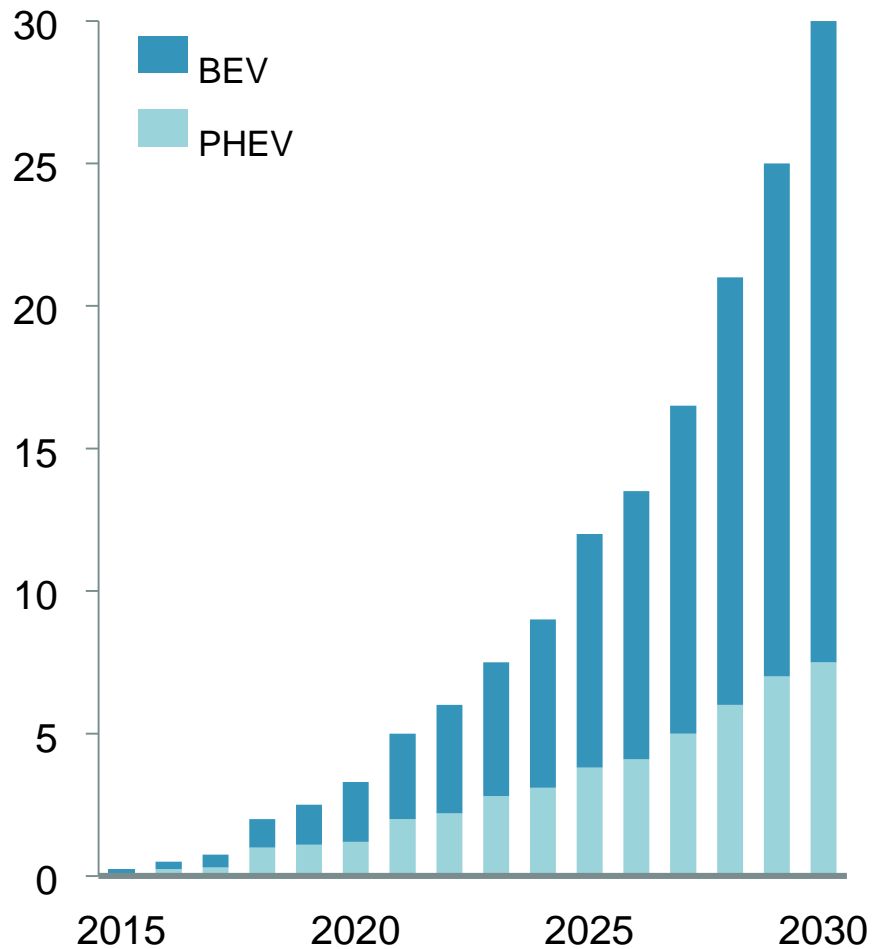
Each cycle of investment is governed by ZEV Investment Plans. The Environmental Protection Agency (EPA) and the California Air Resources Board (CARB) must review the ZEV Investment Plans for consistency with Appendix C requirements.

Electrify America is fulfilling an investment commitment and does not provide grant funding. Our mission is to build a sustainable business model for EV charging that continues to operate after the 10-year commitment.

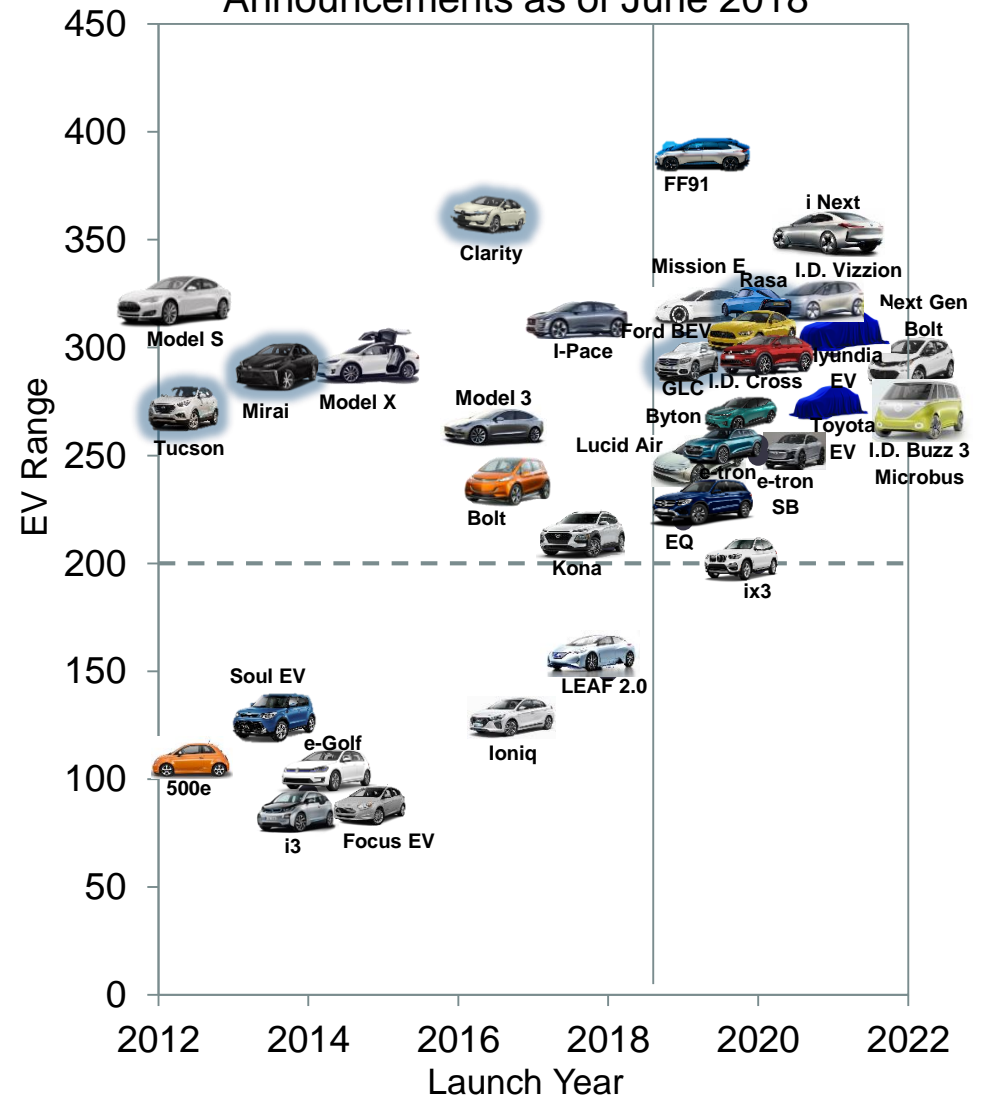


The growing EV market – More models, longer ranges, faster charging

Global EV Sales Forecast
As of June 2018



Vehicle Launch Date vs Range
Announcements as of June 2018



Source: BNEF, OEM Announcements; 180213_OEM volume forecast summary with BP.xlsx



Electrify America has become the largest open EV charging network in the country

300+ stations online nationwide



Contracts announced with four EV OEMs



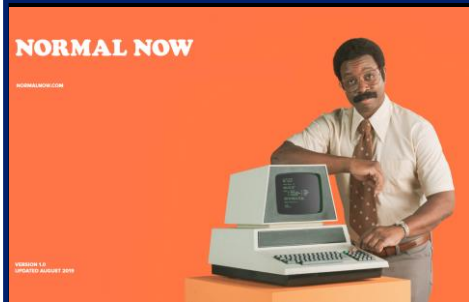
Sac-to-Zero initiative launched



Awarded Popular Science "Best of What's New 2018"



"Normal Now" campaign launched



First 350kW chargers deployed in US



Battery provider selected



First 800V, 270 kW charging event in the world

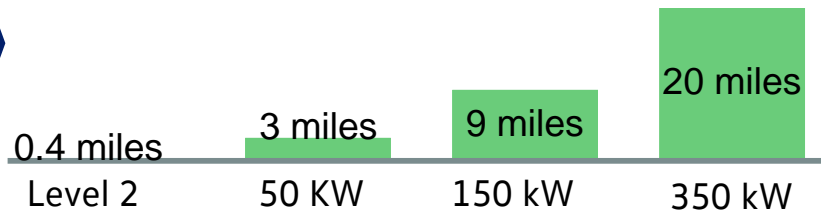


Electrify America stations feature ultra-fast charging speeds with customer-focused features and design

Speed

Miles of range* per minute charged by DCFC power

*Assumes 3.5 miles per kWh



Connections

Non-proprietary chargers at all stations:
CCS and CHAdeMO

Payment

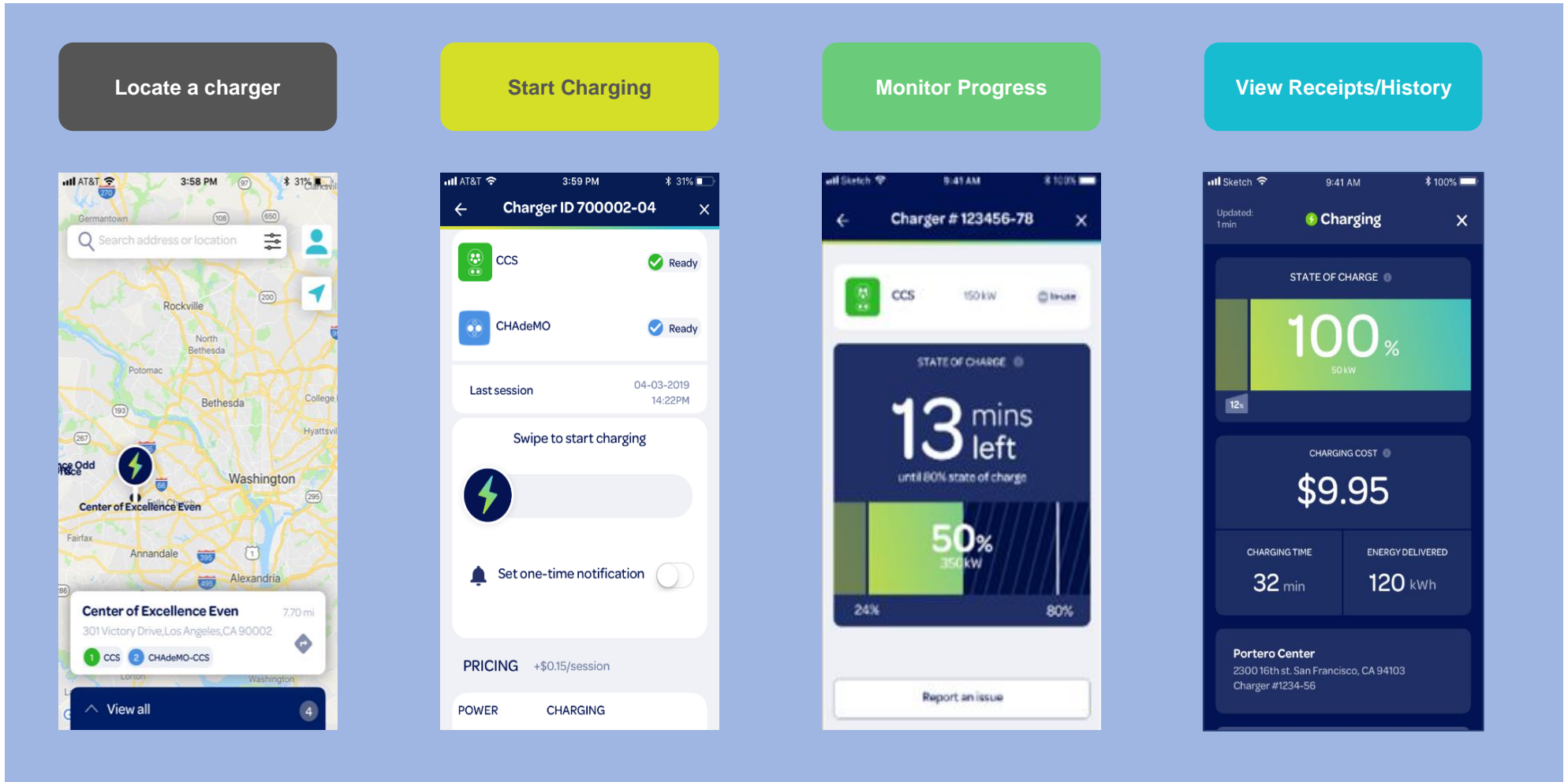
Credit card access




RFID, Mobile Pay & app access

Plug and Charge (CCS ISO15118)



Electrify America unveiled a new charging app, membership program and pricing in Q2 2019



-  View charging and billing history
-  Authorize charging via NFC or Swipe-to-Start
-  Promotional content planned

Electrify America partners with 25 real estate companies to secure station sites that meet several criteria



Sheetz, Fueling, Dining, and Convenience Chain, Girard, OH



Walmart, major national grocery and retail chain



Dell Mercantile, General store & Post Office, Dell, Montana



Target, major national grocery and retail chain



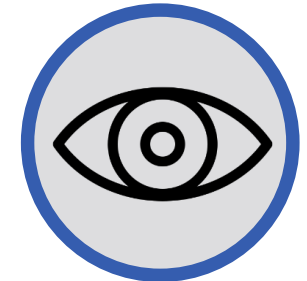
Brugh's Mill Country Store, Fincastle, VA



Macerich, Real Estate Investment Trust Specialized in Malls



Safety



Visibility



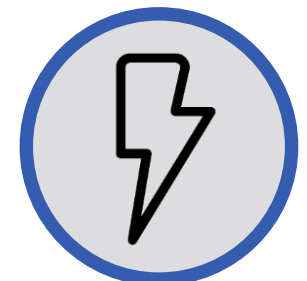
Sufficient Parking



Retail Proximity

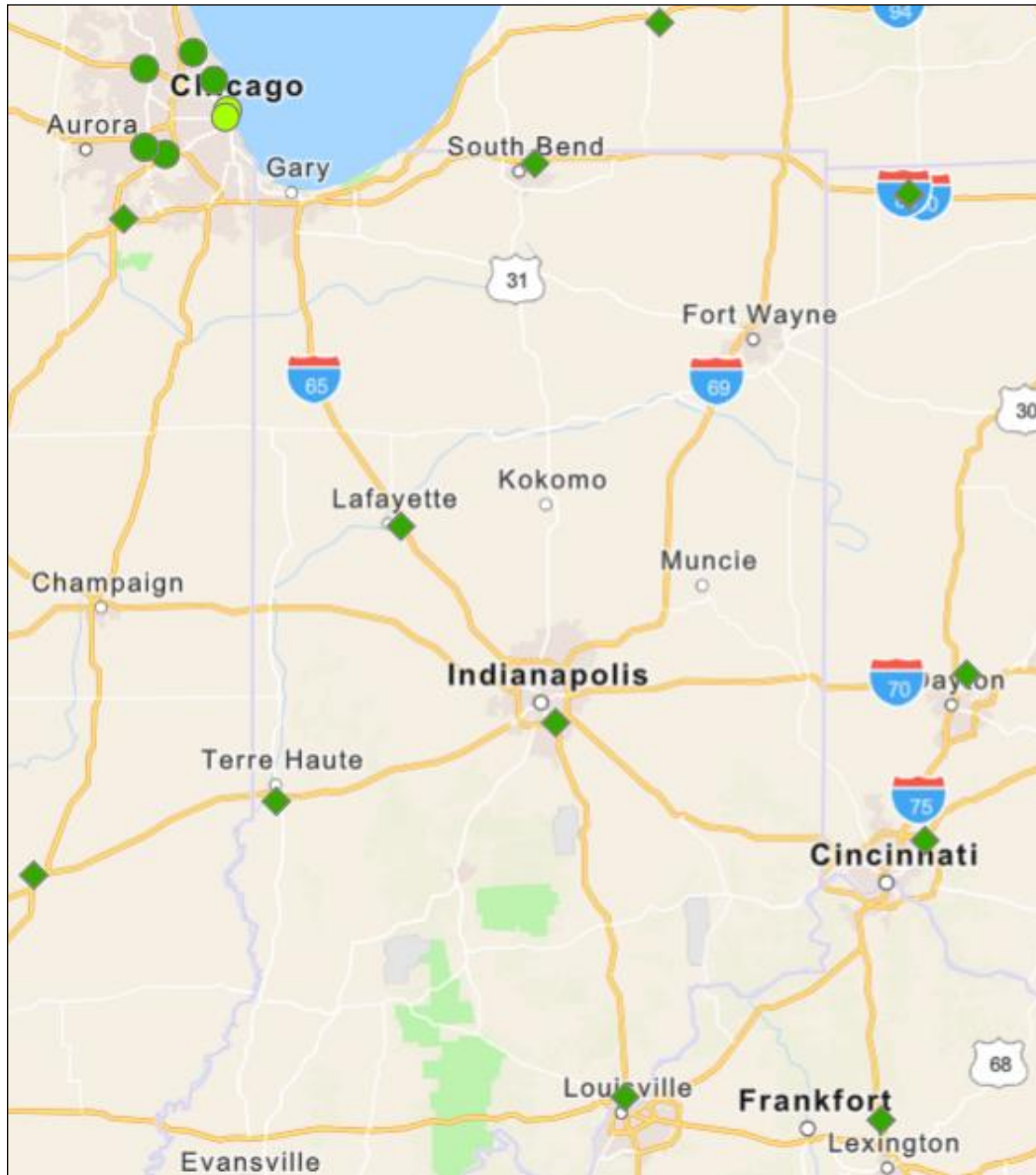


24/7 Access



Power Proximity

Electrify America - Cycle 1 DCFC Investments in Indiana



Mishawaka – University Park Mall
Two 350 kW and two 150 kW chargers

Lafayette – Walmart Supercenter
Two 350 kW and two 150 kW chargers

Indianapolis – Walmart Supercenter
Two 350 kW and six 150 kW chargers

Terre Haute – Walmart Supercenter
Two 350 kW and two 150 kW chargers

Clarksville – Walmart Supercenter
Two 350 kW and two 150 kW chargers

- ◆ Highway station commissioned
- Metro station commissioned
- ◆ Highway station under construction
- Metro station under construction

Electrify America's Cycle 2 plan supports our mission to develop an ultra-fast, comprehensive fueling network for all

Cycle 2 Principles

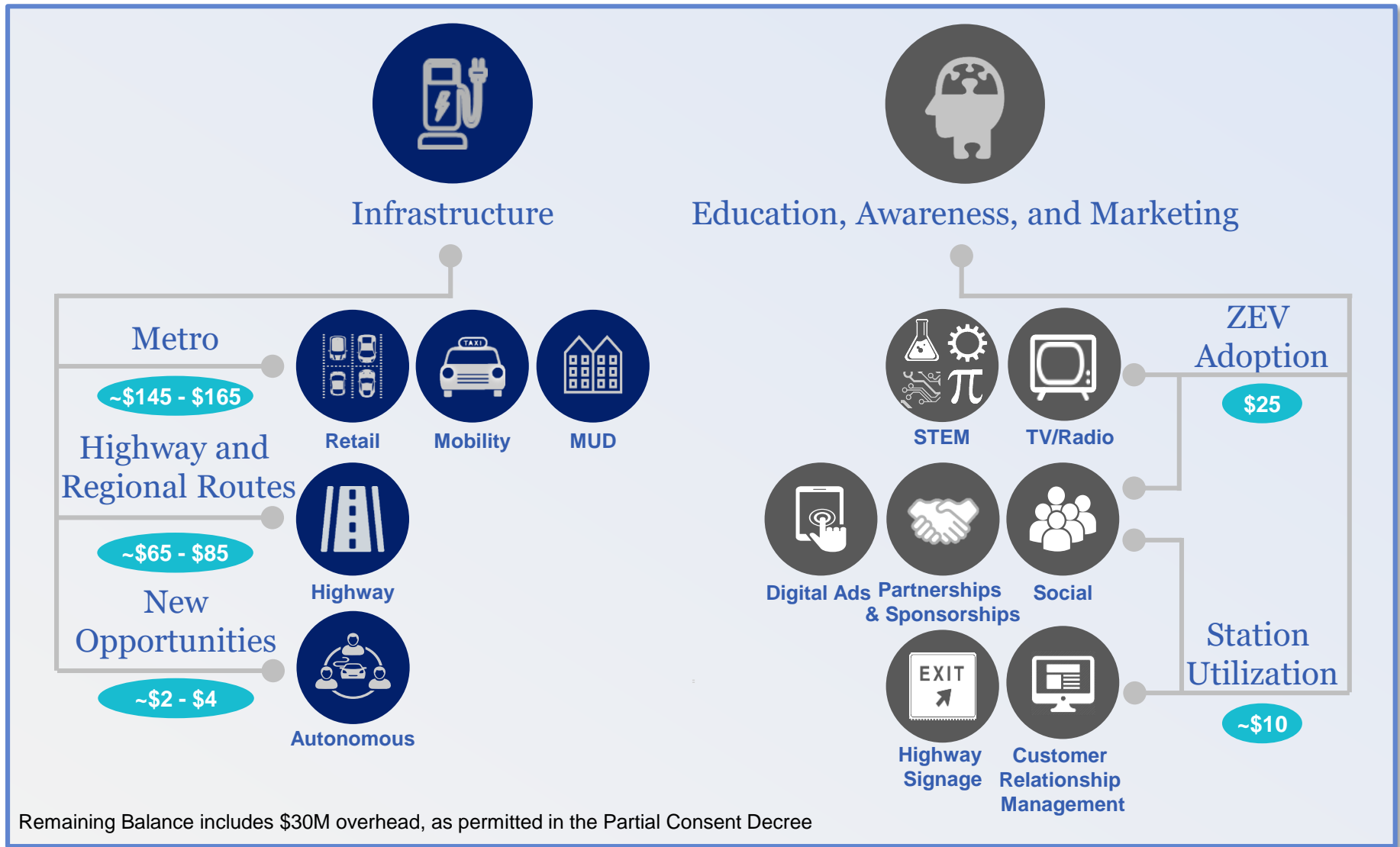
Start from the fundamentals

Engage external stakeholders

Emphasize real world inputs



The Cycle 2 Plan invests \$300M nationally between July 1, 2019, and December 31, 2021 to increase ZEV adoption



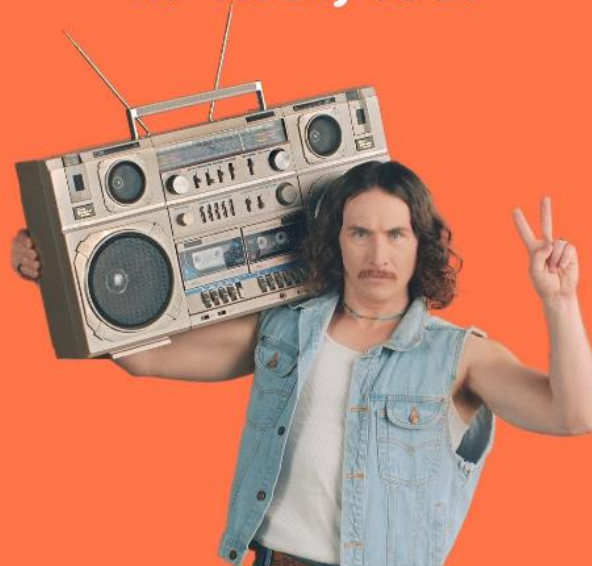
Cycle 2 Education and Outreach Efforts: Normal Now campaign

Videos, digital ads, social media, and more showing how EVs mirror other technologies in reaching the mainstream

**COMPUTERS
SEEMED WEIRD
AT FIRST, TOO.**



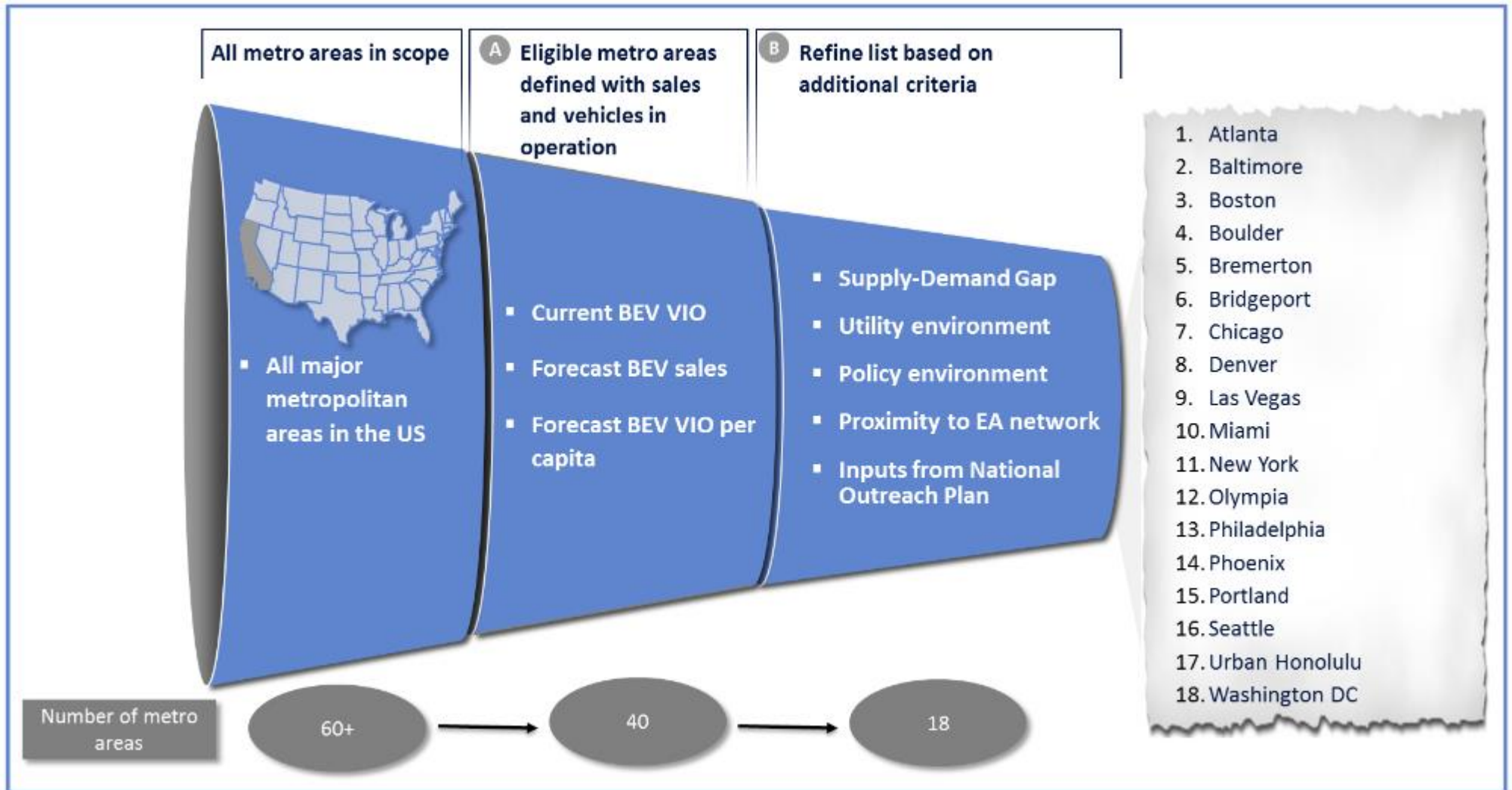
**Portable music
seemed weird
at first, too.**



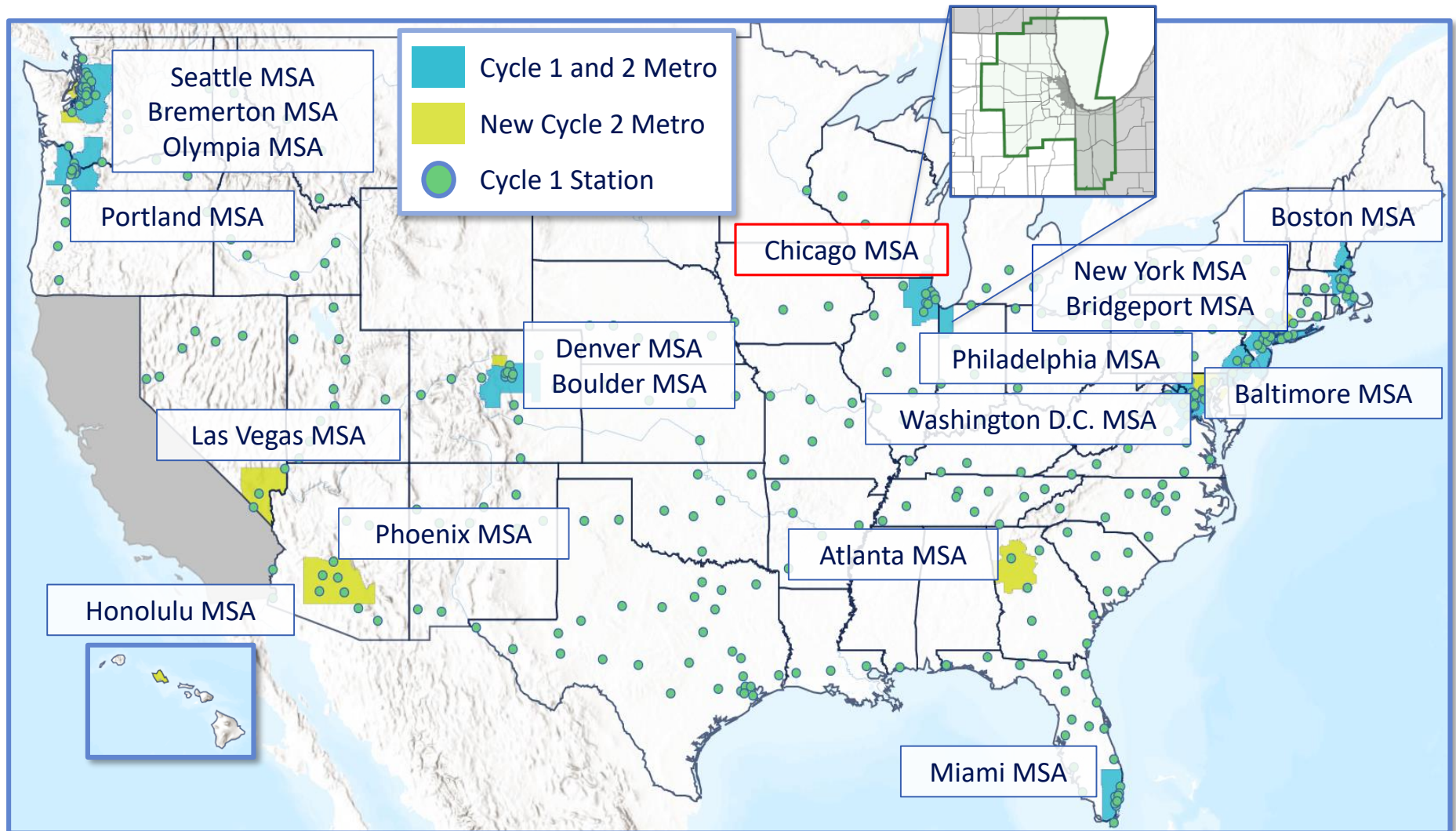
*Remote controls
seemed weird
at first, too.*



Cycle 2 will focus on supporting EV market development in 18 key metro areas

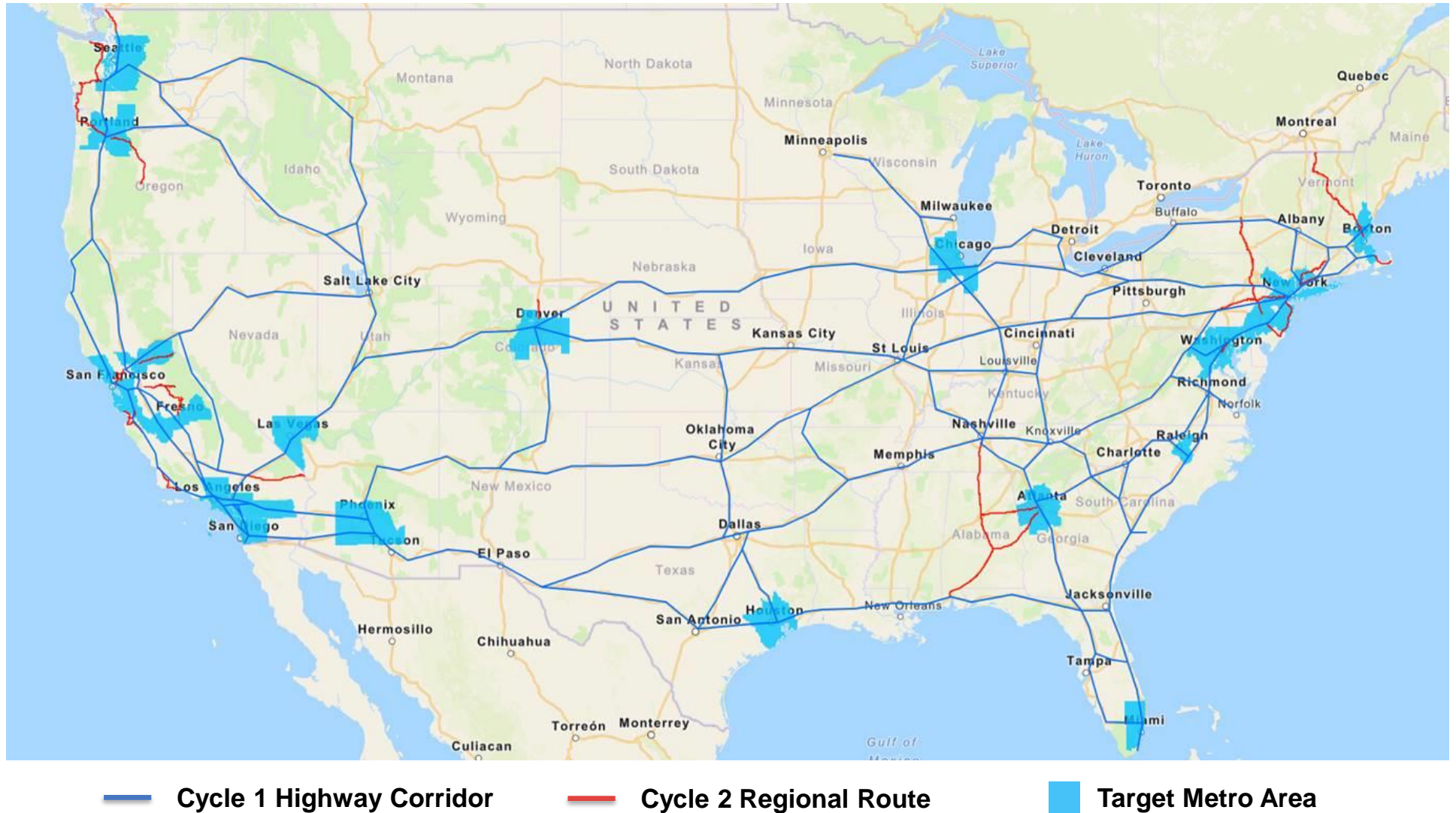


Cycle 2 investments will be made in 18 metropolitan areas across the country, an increase of 7 from Cycle 1

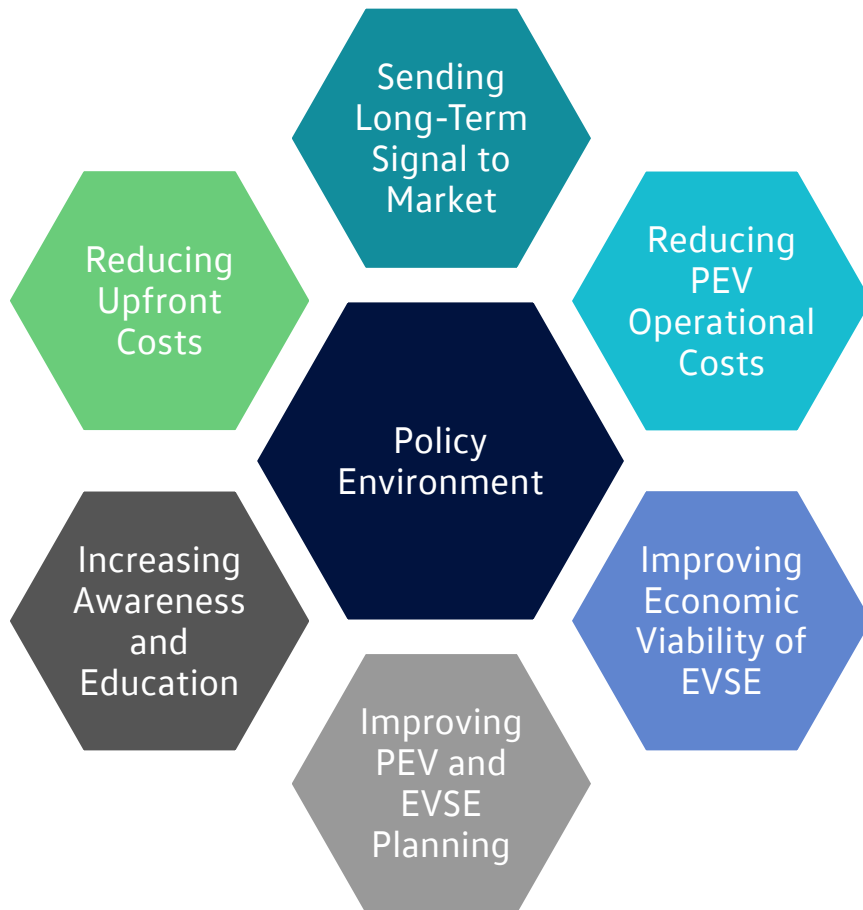


The Chicago metro area is targeted for an additional 8-12 locations in Cycle 2

Cycle 2 investments will help to add to Electrify America's extensive national network of EV chargers



States and cities can create policy environments to encourage ZEV adoption and investment



Analysis by NASEO and Cadmus found sending a long-term signal to the market and reducing upfront costs were the most powerful policy tools to drive ZEV adoption.

PEV Policy Evaluation Rubric:

https://naseo.org/Data/Sites/1/pev_policyrubricmethodology_naseo.pdf

We look forward to continued collaboration



Thank you

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