



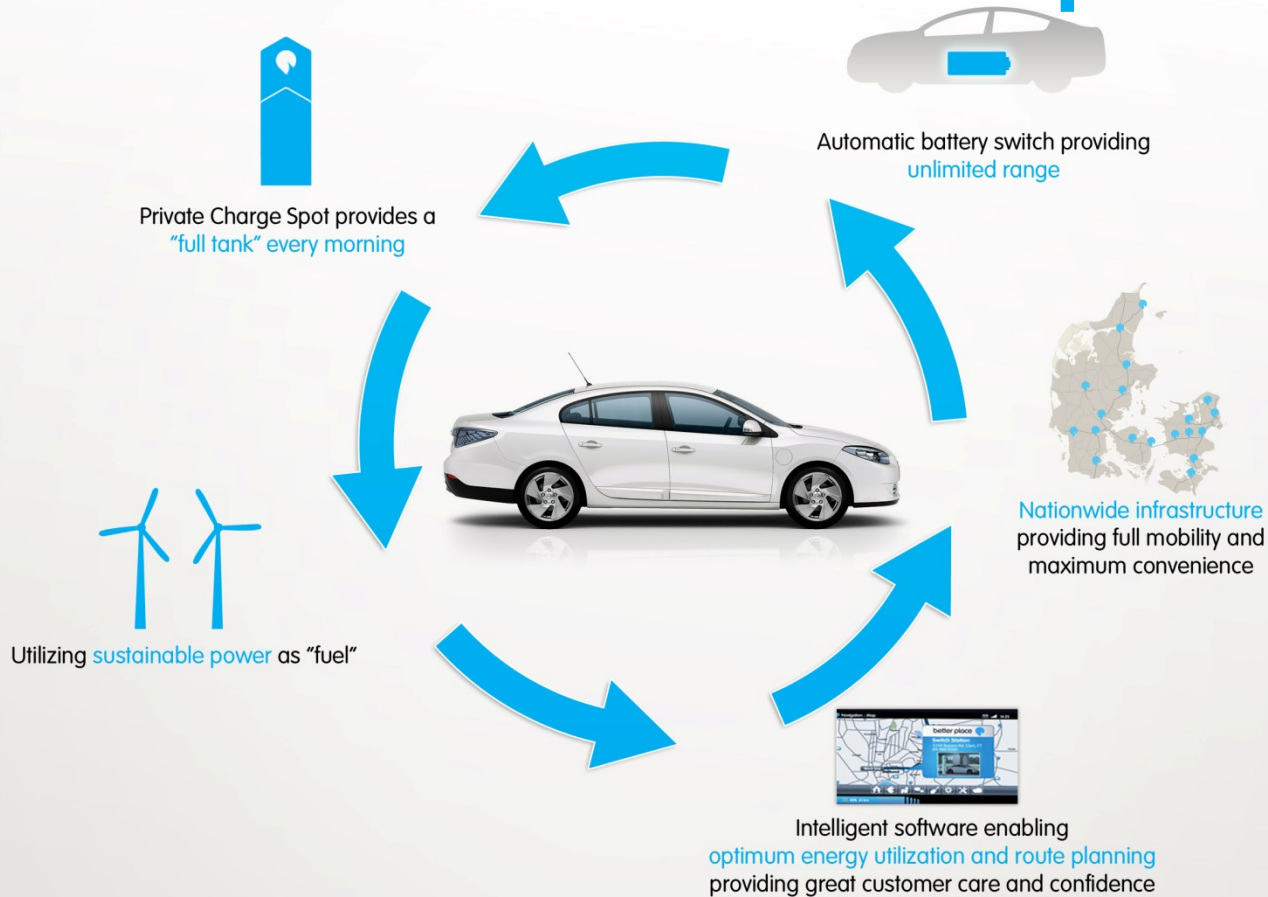
better place



The role of the electric car network operator and the growth potential.

Our offering

The electric car network operator



Nationwide

Q1 2012



Positionerne er indikative med mindre andet er angivet



Customer focussed

Roaming *is one*

of several key factors

for **EV-penetration**



Lets not get technical.....the customer wants



Standards
Convenience
Transparenc
y



What does the **consumer** expect from roaming?

One cable and one means of identification

Our model is based on a **mode-3 charging cable with mennekes-plug** and a **RFID-chipcard** for identification.

One point of contact

All contact /customer service through my own operator

Billing from your own operator only

One invoice including roaming charges

One integrated charging infrastructure

The customer should also be able to get **info on all of the charging infrastructure from his already existing platform (including availability)**, regardless if this is from in-car navigation, app etc.

Simple overview of what you get - when you charge

"How long can I drive, at what cost, by charging a certain amount of time".

What does the **consumer** expect from roaming?



Identification and charging between operators



Sharing information about the infrastructure and the availability



Billing and settlement



Roaming is one of more prerequisites for unleashing the EV growth potential

The world is going electric



Spain: 250,000 EV's by 2014

Germany: 1 million hybrid and EV's by 2020

Netherland: 1 million EV's on the road by 2020

Ireland: Convert 10 % of national fleet to EV's by 2020

France: 27 % of the car park as "clean vehicles" by 2025

United Kingdom: 600,000 EV's and hybrid cars in London by 2020

China: 500,000 electric cars by the end of 2015



A huge **growth potential** for Denmark

- Access to renewable energy
- Capable clean tech industry
- Ambitious climate strategy (could be even more aggressive)
- Smart grid investments and electric cars



• **10,000 new jobs short term and 20,000 long term**
(Deloitte for DEA)

- **Denmark can take a lead**, use the momentum we have in the sustainable energy sector - and electrify transportation now

What the Danes **Should do**



A National strategy

introducing incentives, standards, certified operators and interoperability

Financial incentives:

- Certainty about exemption from registration taxation
- New tax regime on leased cars and company cars
- New green taxation scheme – based on CO2 emission

Other incentives:

- Free parking in cities
- Allocated electric car parking spots in the cities – to secure charging infrastructure
- Relief on congestion charges for EV's
- Option for electric cars to use the bus lanes

What **Norway** *did.....*



Financial incentives:

- Exemption from registration taxation
- Exemption from VAT
- Electric cars – in company car fleets – taxed only 50%

Other incentives:

- Free parking in cities (under municipality administration)
- Electric car owners are allowed drive in the buslanes = huge time saver
- Electric cars pay no congestion charge fee in Norwegian cities
- Free charging for electric cars from state-owned charge spots
- Free "ride" for the electric car on state-owned ferries
- Higher car allowance (per km driven) for electric cars (4,5 NOK instead of 3,5 NOK)

So



Roaming is one of more
prerequisites
for unleashing the EV
growth potential

Lets get on with it



thank you!