THE CHANGING DRIVER EXPERIENCE

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Drivers of EV Revolution

1 **Transportation remains the least diversified, most carbon-intensive sector of human activity in terms of energy demand. Oil intensity of transportation:**

Source: IDC on IEA data

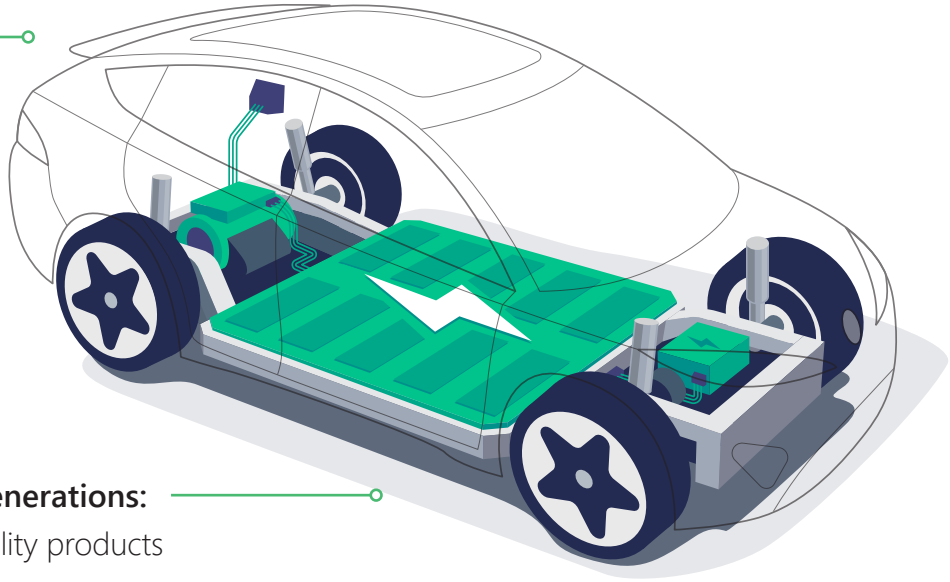
2 **However, multiple factors are aligning to set the electric mobility revolution in motion, including:**

Government net-zero ambitions and policy action;
e.g., EU Green Deal, -90% emissions from transport by 2050 compared to 1990 levels

Source: European Commission

Shrinking cost of batteries:
-85% between 2013 and 2023 to around $100/kWh -> unsubsidized price parity of EVs and internal combustion engine vehicles

Source: IDC on BNEF data



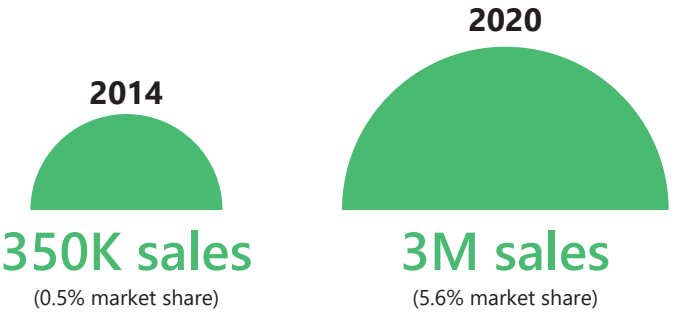
Growing climate conscience of general public, especially younger generations:
Globally, **Gen-Z (18-24 y/o)** are almost **four times** as interested in emobility products and services than 53y/o+

Source: IDC

EV Take-up

1 EV passenger car sales have increased almost ten-fold in six years. Despite the COVID-19 crisis, 2020 was the strongest year on record for EV sales

Source: IDC on IEA (International Energy Agency) and OICA (International Organization of Motor Vehicle Manufacturers) data

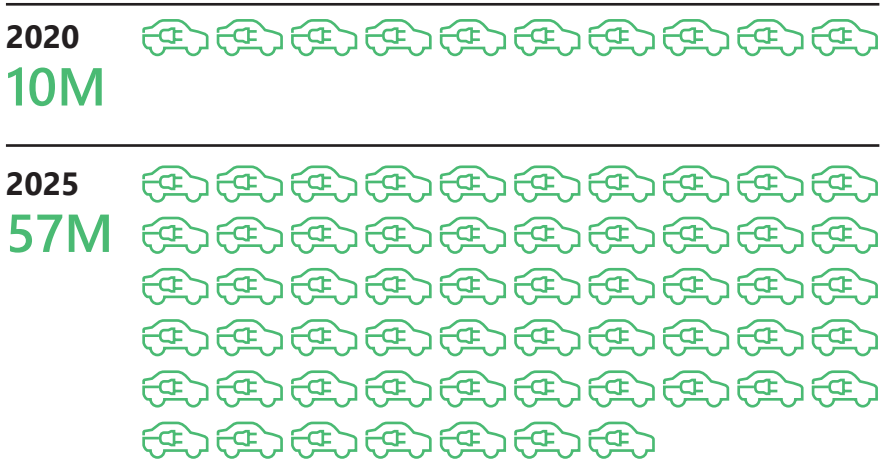


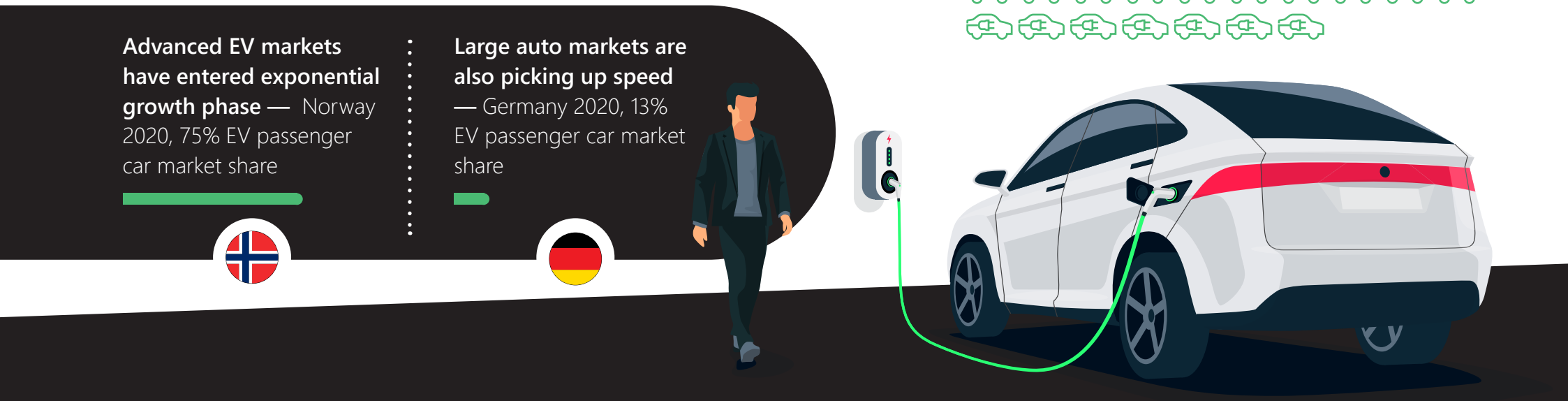
Advanced EV markets have entered exponential growth phase — Norway 2020, 75% EV passenger car market share

Large auto markets are also picking up speed — Germany 2020, 13% EV passenger car market share

2 Global EV passenger car stock expected to increase almost sixfold in next 5 years

Source: IDC on EIA and BNEF (BloombergNEF) data



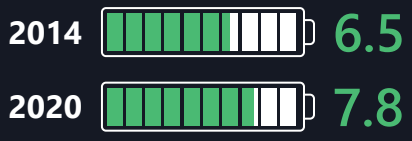


Demand for Infrastructure

1 **Deployment of charging infrastructure will be the real pace setter of the EV revolution. Public charging infrastructure is growing at pace globally but needs to accelerate to enable convenience, range, and autonomy for EV drivers.**

Global number of EV passenger cars per publicly accessible charger

Source: IDC on IEA data



Advanced EV markets are struggling to keep up

NO 33

DK 20

cars per public charger

Source: IEA

2 **Examples of regional public EV charging infrastructure rollout targets**

Sources: European Commission, European Automobile Manufacturers' Association, U.S. White House

EU Green Deal:
1M public chargers by 2025

U.S. American Jobs Plan:
National network of 500,000 chargers by 2030

ACEA recommendations:

Trend #1 - "Democratization" of Mobility Services

1 **"Refueling becomes recharging"**

industry expands from one dominated by oil companies to one that includes, as a minimum, utilities, municipalities, commercial space owners, and fuel retailers…

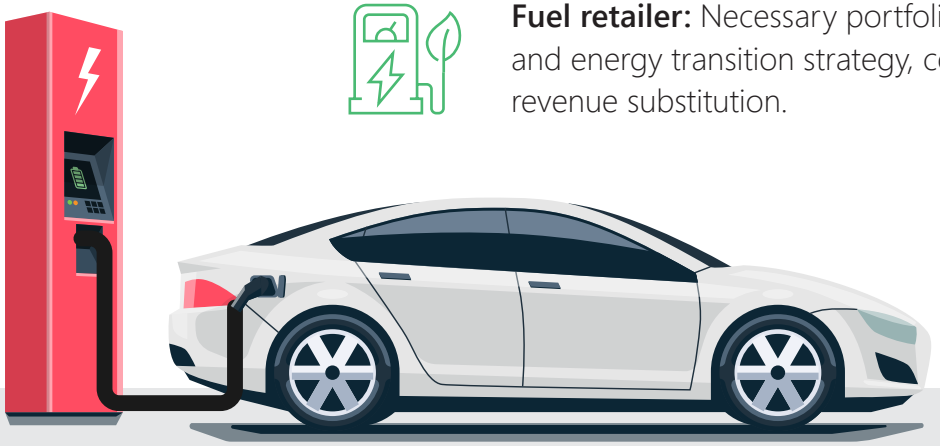
2 **Examples of "future charging experience" driven by technology and business innovation, with different equipment, solutions, and services offered for different use cases and types of EV drivers.**

Commercial space owners: Promotion of sustainability/social responsibility values, customer experience and loyalty, future-proofing operations.

Municipalities: Promotion of sustainable mobility, better air quality, improved livability standards, and city attractiveness.

Utilities: Core business expansion and integration downstream into mobility services.

Fuel retailer: Necessary portfolio diversification and energy transition strategy, core source of revenue substitution.



Trend #2 - The Changing Driver Experience

1 **"Refueling becomes recharging"**

consumer demand shifts from a spot refueling transaction to a more expanded recharging experience.

2 **Examples of "future charging experience" driven by technology and business innovation, with different equipment, solutions, and services offered for different use cases and types of EV drivers.**

Commercial space owners: Contextual advertising and in-store promotions at the charging point, loyalty program and parking access automation, customer self-service, remote concierge, queue management functionality.

Utilities: Smart charging, EV load aggregation, vehicle-to-grid, behind-the-meter energy optimization services, open EV roaming, touchless charging, consolidated billing.

Municipalities: Automatic emobility service provider recognition, touchless charging, self-service onward journey planning directly at the charging point.

Fuel retailer: Automatic customer recognition and "fuel card" management, touchless charging, self-service convenience stores. From traditional forecourt to multi-service point of presence.