

EEO Workshop

Z.E.

DRIVE THE CHANGE



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01 MARKET SITUATION

02 INFRASTRUCTURE NEEDS

03 IS IT ENOUGH ?

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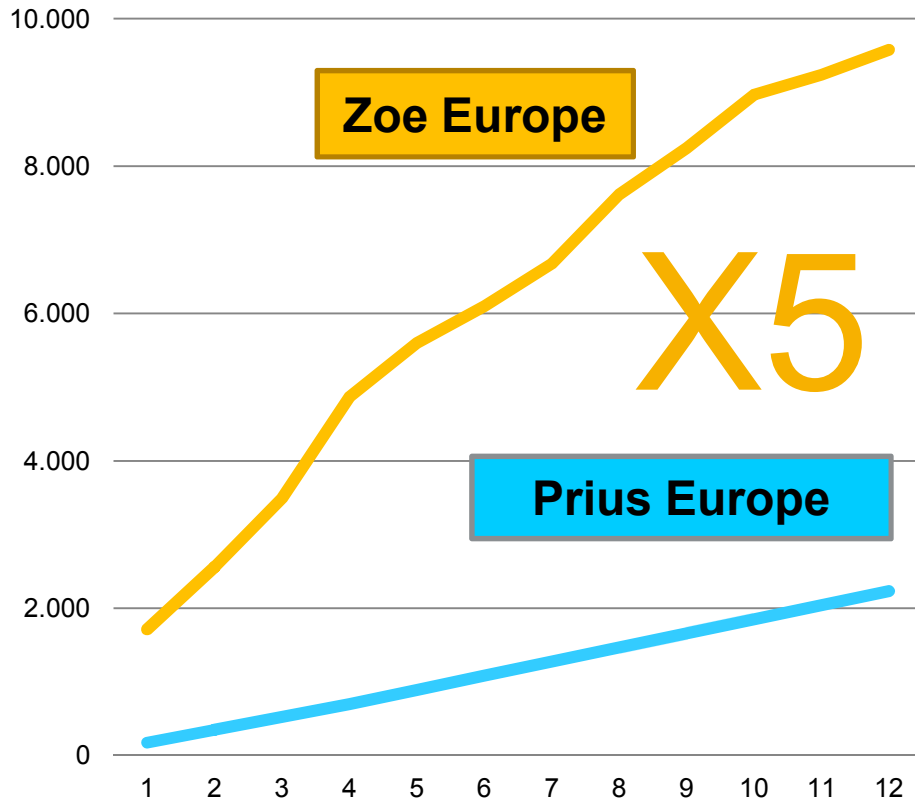
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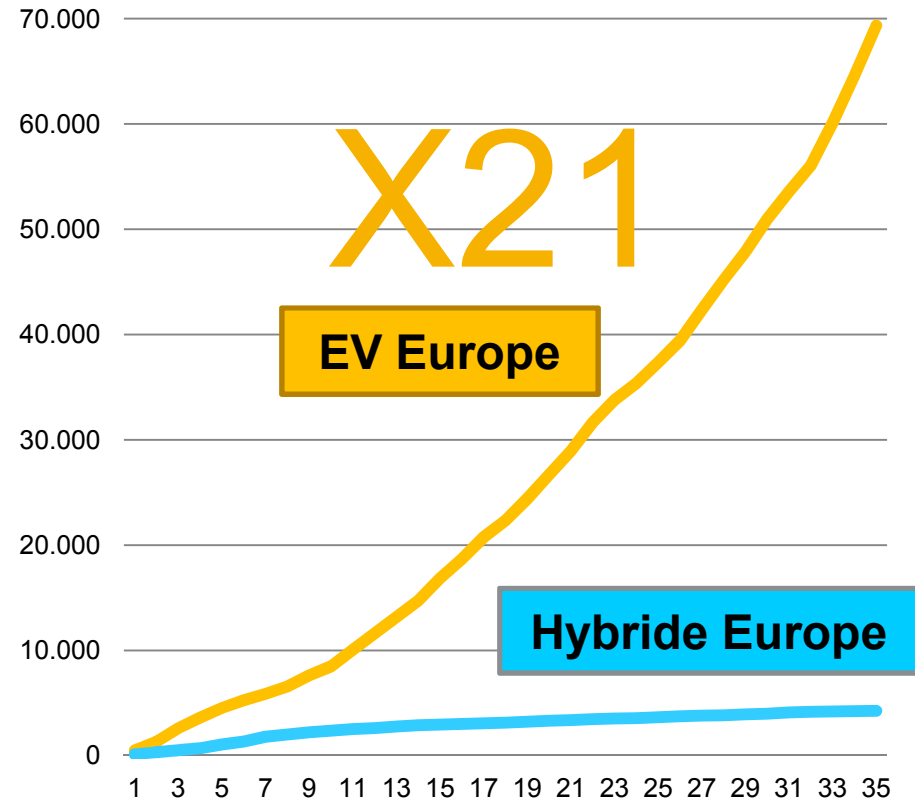
EV TAKES OFF

FIRST 12 MONTHS OF SALES
CUMULATIVE ZOE



ZOE Europe : from March 2013
Prius Europe : from September 2000

FIRST 35 MONTHS OF SALES
CUMULATIVE TOTAL EV



EV Europe : from January 2011
Prius Europe : from September 2000



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REAL USAGE SHOWS NO CONSTRAINT

- After 3 years, what have we learnt from our customers:

Daily mileage	
Less than 50km	47%
From 50 to 100km	47%
From 100 to 150km	5%
More than 150km	1%

Average : 53km / day

- Less than one charge a day on average

Great but addressing only commuters

- Mainly customers living in private households



- More than 3/4 are living in cities from less than 50000 inhabitants



Infrastructure : major bareer

- **1st reason of EV rejection :**

Difficult to charge, charging pole location/availability

44%

Autonomy

42%

- **But is this really what customers mean ?**
- **Or is it night charge solution ?**
- **Or is it visibility on public infrastructure ?**

- **Should really number of charging poles = 10% of number of Evs ?**

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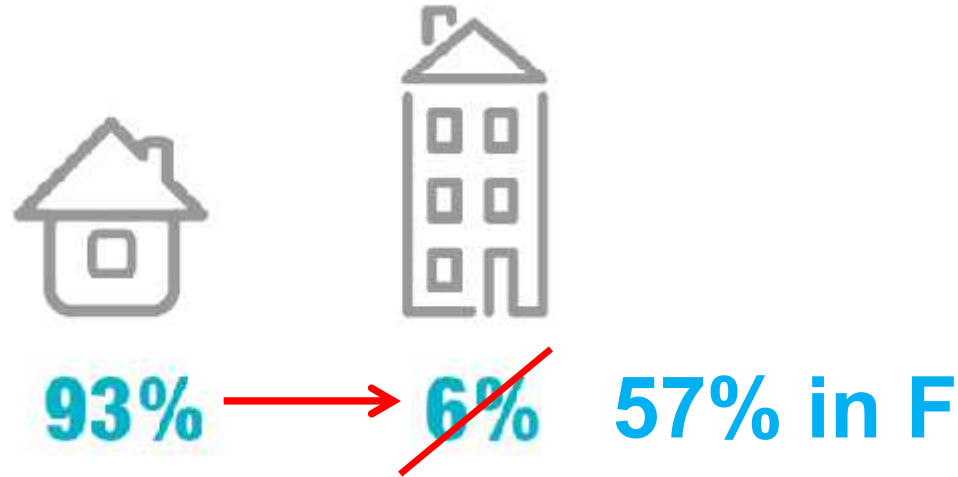


Basic infrastructure need

- Strasbourg : 2 x EV market in France
- Only **74** poles
- In 5 supermarkets in Alsace :
 - 500 Zoé, 1100 charges within 1 semester
 - 220 charges per pole , so more than 1 per day
- *BASIC : Those brand have initiated charging pole installation on premises. They are attracting most of car trafic.*
Has every municipality checked on Tomtom places local situation ?



From commuters to city inhabitants



Provide a night charge solution

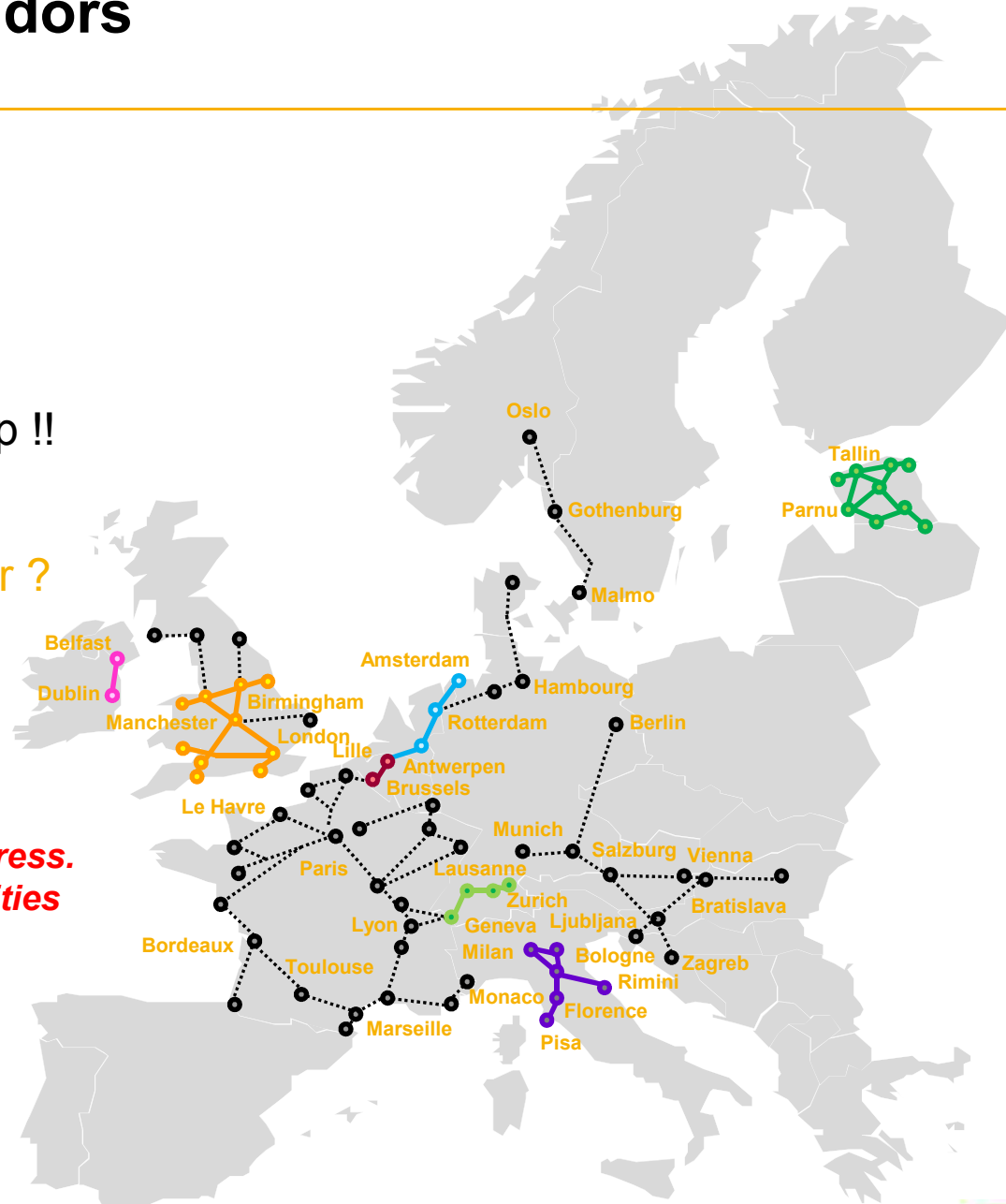
- AMSTERDAM very efficient! 1 EV, 2 public parking places to charge
- LISBOA no clear floor paving, many ice cars park on EV places
- PARIS costly solution, limited number of spots (5000)
- BARCELONA customer renting parking place for night parking, obligation towards parking owners

It's NOT having 5000 charging spots, IT IS ABOUT ENSURING CUSTOMER WILL BE ABLE TO PARK AT NIGHT all along EV life

A lot of coming QC corridors

- TEN-T funding
- New Fund CEF : bridge the gap !!
- Are you connected to a corridor ?

*Currently information session is in progress.
We would like to build something with cities*



Infrastructure Business model : prices are decreasing

Price ideas : september 2014

Charging station	Price
2x 22kVA	2000€
1x43kVA	5000€
Tri-standard 43kVA AC / 50kW DC	19000€
WallBox 16A	500€

Charging station	Coût
Installation / connexion	226 / 311€
Electric board and meter	370€
« EV » painting	170€
EV presence sensor	77€
1 linear meter of civil work	~200€
Operating (4y)	300€
Maintenance (4y)	270€



**Interoperability
standard**

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Enhance Commuter EV market

FREE PARKING

MADRID

Nice offer (expensive parking, limited to 1h) but no real visibility, no good coverage, poor poles

OSLO

Huge coverage, limited available parking places in city center for ICE
Note : charging poles are hardly used !! Parking is more important than charge

Free parking never works except when drastically limiting ICE parking capacities

AUTORISED USAGE OF BUS LINES

OSLO

very efficient! Linked with parking place, huge time saving, correlation with parking

It's NOT about having autorisation, IT IS ABOUT HAVING THE APPROPRIATE SET. Oslo focussing on Commuters.

Long term plan needed ?

In 2014,
Strasbourg : 8% of Renault sold are Evs VS 1,3% of all cars sold are EVs

However, extra incentive (5000€) is over since april 2014

- Higher visibility of Renault EVs
- Renault Sale forces are not afraid to handle customer anymore

**BRING CONFIDENCE IN THE SYSTEM, COMMUNICATE
AND LET MARKET TAKE IT OVER**

EVENTHOUGH IT'S NOT ENOUGH

- **Make sure citizens & drivers are aware :**

- **Ex. : London**

- 5000£ incentive + Free Wallbox

- Free city toll (18£/day)

- QC corridors towards Manchester, Birmingham, Brighton or Cardiff

- 2000 public poles

- **Go ultra Low campaign : www.goultralow.com**

- Campaign paid by gvt and all OEMs

- Targeting ecosystem



theguardian

The Telegraph

LBC 97.3 FM
London's Biggest Conversation

BAUER
MEDIA GROUP



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Examples of supports

What are local incentives ? Can anyone tell ?

QUESTIONS



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