SIS47 – RENAULT
MARKET AND CUSTOMER PERSPECTIVE
MARKET SITUATION

- **EUROPE TIV:**
  - 43,642 units YTD, **+26.3% vs. YTD 2016.**
  - Share of TIV 0.71% compared to 0.60% in whole 2016
  - **Without France and Norway,** the market is **+51.8%** with a share of TIV at 0.46%
  - **France leading EV market in Europe** (in volumes) in front of Norway
  - Top 4 (FR, NO, DE, UK) accounting for 74.3% of the European market
  - Markets that increased over 50% vs Y-1 are: Portugal and Germany

- **OEM PERFORMANCE YTD**
  - Renault is 1st **brand** in front of Nissan (+ 2 909 units) with **11 862 units (excl. TWZ)**
  - With **27.2%** marketshare
  - **ZOE best selling EV in Europe,** sold 37% more than nr 2 Leaf (+ 2 909 units) and **+38.4% vs Y-1**
  - Nissan e-NV200 is 1st **LCV,** Kangoo Z.E. is 2nd **LCV**
EU PUSH

- **To ensure availability of Electric vehicles**
  - Through ambitious CO² emission mix after 2020 (new cycle, drastic mix targets)

- **To ensure availability of Charging ecosystem**
  - Through alternative fuel directive (sept 2014)

- **To seek for exemplarity**
  - Public fleet shall integrate > 25% Evs, following clean procurement directive (2009, reviewed this year ?)

On TOP of many local initiatives

- **To support e-mobility within cities**
CUSTOMER EXPECTATIONS: NO RANGE ANXIETY THROUGH EASY SERVICE

« Public charging stations are everywhere, but.... »

ENVIRONMENT
86,000 EVSE in Europe... but where?

COMPLEXITY
Many plugs standards: is the station compatible with Zoé?

- Typ 1: Combo
- Typ 2: CHAdeMO
- Typ 3: Schuko

RANDOM AVAILABILITY
No info if the station is free, occupied or out of order?

- Live information on availability status

ACCESS RESTRICTED
One card/subscription required for each network

- A single Pass to charge everywhere

Localise charging stations
Know plugs type on the charging station
1000 CPOs
- With different reliability
- With different data refresh time (from 1sec to 10min)
- With different level of service (providing different attributes) .....

Belib’ status on 02/06/2017 (11h43) = 25% of poles are out of order

Navigation screenshot: this CPO is not providing pole status
**Evs are connected vehicles**

- **ZOE : 100% Connected cars VS Clio : 6%**
- **OEM offering connection to follow charges**

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**Mainly to ensure easy mobility through seamless charging**

**Therefore within Nemo project, RENAULT is aiming at ensuring**

- **Global pan-european charging service**
- **With homogeneous quality of service**
- **At best price for customer**

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**SIS47 – MARKET AND CUSTOMER PERSPECTIVE**

**CONCLUSION**

<table>
<thead>
<tr>
<th>Brand</th>
<th>RENAULT</th>
<th>KIA</th>
<th>Volkswagen</th>
<th>NISSAN</th>
<th>BMW</th>
<th>Tesla Motors</th>
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<tbody>
<tr>
<td>App</td>
<td>ZE Services</td>
<td>UVO EV Services</td>
<td>Car-net</td>
<td>NissanConnect EV</td>
<td>BMW Remote / iRemote</td>
<td>Tesla Motors / Tesla Model S &amp; Model X</td>
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<tr>
<td>Vehicles</td>
<td>Zoé, Kangoo, et Fluence</td>
<td>Kia Soul EV, Kia Optima Hybrid, Kia Niro</td>
<td>e-up et e-Golf Golf GTE, new Passat GTE</td>
<td>LEAF, E-NV200 EVALIA, NISSAN E-NV200 FOURSON</td>
<td>BMW i3, BMW i8</td>
<td>Model S, Model X, Model 3</td>
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<tr>
<td>SUBSCRIPTION</td>
<td>3 YEARS FOR FREE</td>
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*July 2016, in €*