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Worldwide e-mobility development is determined by 3 main factors:
- Government
- Industry
- Consumer

Development e-mobility
Spotlights PC EV (BEV+PHEV) + HEV
USA, Europe and China are the most important e-mobility markets

<table>
<thead>
<tr>
<th>Governmental measures</th>
<th>Industry push</th>
<th>Consumer demand</th>
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<tbody>
<tr>
<td><strong>USA</strong></td>
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<td>• Stricter CO₂-standards/laws lead to a wider e-mob model offer which then pushes demand.</td>
<td>• Based on “ZEV credits” and “upstream emissions” OEMs focus more on BEVs and HEVs; PHEVs will play a minor role in the long-run.</td>
<td>• Low crude oil price and a low share of premium segment vehicles delay demand for e-mobility.</td>
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<tr>
<td><strong>Europe</strong></td>
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<td>• Governmental measures to boost demand for electric vehicles vary highly between markets (e.g. France vs. Italy).</td>
<td>• European OEMs expand their model offer in BEVs in the long-run, but focus on PHEVs in the short-run.</td>
<td>• Increasing range, fast charging and decreasing costs for batteries will increase customer acceptance for electric vehicles in the long-run.</td>
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<td><strong>China</strong></td>
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<td>• Implementation of „ZEV credit system” starting in 2019; gradual reduction of financial support until 2020; non-monetary support and restrictions after 2020, e.g. registration restrictions.</td>
<td>• Local OEMs push development of electric vehicles.</td>
<td>• Different regulation measures between regions lead to varying levels of acceptance.</td>
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In addition to electric engines, the Volkswagen Group will still develop modern and efficient ICEs.
Electrification Initiative „Roadmap E“

- 16 production facilities for electric vehicles until the end of 2022 (currently 3 production facilities).
- It is planned to build up to 3 million electric vehicles per year and to launch 80 new electric models until 2025 (currently 8 BEV and PHEV models).

**2025**
- + 50 BEVs and 30 PHEVs
- Up to 25% of new Group vehicles intended to be purely battery-powered

**2030**
- At least one electrified version for each of the Group’s >300 models
Progress in battery technology will improve range, weight and costs

* basis: eGolf with comparable battery volume

- 190 km (230 Wh/l) in 2014
- 300 km (410 Wh/l) in 2017
- 380 km (650 Wh/l) in 2018
- 420 km (700 Wh/l) in 2020

New battery technologies

- 700 km (1000 Wh/l) all solid state
- 500 km (800 Wh/l) improved anode and cathode

Lithium ion technology

19 March 2018 K-GVS
IONITY: Multi-OEM Joint Venture to deploy a HPC charging network in Europe

- Unprecedented collaboration among automakers
- Open brand-independent network
- Deployed power levels up to 350 kW
- Network based on the Combined Charging System (CCS) international standard
- Build-up started in Q4 2017