ELECTRIC VEHICLE
RENAULT, DRIVING THE ELECTRIC REVOLUTION

GILLES NORMAND
SENIOR VICE PRESIDENT,
ELECTRIC VEHICLE
ENERGETIC & ENVIRONMENTAL STAKES

Energy
Reduce oil dependency

Health
“Airpocalypse”

Climat
Limiting warming < 2°C
Countries under CAFE regulation = 83% PC TIV in 2016
With Iran, Turkey and Chile = 86% PC TIV
INCENTIVES AND PUBLIC POLICIES

LEGEND:
- Strong incentives
- Light incentives
- Very light incentives

Current incentives in Europe

GERMANY
Ban on sales of ICE vehicles under investigation → ICE car taxation

NORWAY
Political consensus to impose non polluting vehicles by 2025

UK
Sales of ICE vehicles banned by 2040

FRANCE
Sales of ICE vehicles banned by 2040

AUSTRIA
Envir. & Trans. Minister:
- budget of 72 M€ for 2017 & 2018 to promote electromobility

INDIA
Government announcement: 100% electric vehicles by 2030
Massive investments announced

CHINA
Timetable for banning ICE vehicles under discussion « for a new future »
Substantial national & local subsidies

+
8 YEARS OF EXPERIENCE TO BUILD A COMPETITIVE ADVANTAGE

FIRST MOVER WITH 4 MODELS

TECHNICAL EXCELLENCE
• 3 Formula-E championships
  2014 - 2015
  2015 - 2016
  2016 - 2017

30,000 PEOPLE TRAINED

100% TRAINED DEALERS

CUSTOMER SATISFACTION
• NEW ZOE: 400 km NEDC autonomy
• >90% customer recommendations
• >140K customers

LEADER IN EUROPE

17,5% 25% COMPETITOR 16%

2 1 3

Ytd end sept.
A ROBUST & PROFITABLE CORE BUSINESS BY 2022

THE OBJECTIVE

2008

DRIVE THE CHANGE

DRIVE THE FUTURE

CURRENT LINE UP

NEW EV GENERATION

GROUP AVERAGE PROFITABILITY

INITIAL INVESTMENT NO PROFIT

PROFIT ON VARIABLE COSTS

FULL COST PROFIT

THE PLAN

EXPAND OUR REACH

ACCELERATE COST REDUCTION

LEADER IN AFFORDABLE ELECTRIC MOBILITY

PROVIDE EASY ELECTRIC LIFE

GENERATE VALUE FROM ENERGY & MOBILITY SECTORS

FUEL CHOICES & SMART MOBILITY SUMMIT - OCTOBER 31ST, 2017 – TEL AVIV

DRIVE THE FUTURE

GROUP RENAULT

2008

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DRIVE THE FUTURE

GROUP RENAULT
ACCELERATE COST REDUCTION

3D SCALABLE ALLIANCE PLATFORM

80% of volume based on Alliance platform
• -40% R&D entry ticket
• -30% production cost

COST BREAKTHROUGH

• Battery pack cost (€/kWh) -30%
• New E-motor generation -20%
LEADER IN AFFORDABLE ELECTRIC MOBILITY

TOTAL COST OF OWNERSHIP
EV vs ICE
B-segment – 3 years – 12,000km/y
Including reduction of incentives

AFFORDABLE AUTONOMY

<table>
<thead>
<tr>
<th>Autonomy (NEDC)</th>
<th>Price* (w/o incentive)</th>
</tr>
</thead>
<tbody>
<tr>
<td>400 km</td>
<td>€33,200 #1</td>
</tr>
<tr>
<td>280 km</td>
<td>€32,750</td>
</tr>
<tr>
<td>300 km</td>
<td>€35,900</td>
</tr>
<tr>
<td>300 km</td>
<td>€36,800</td>
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</tbody>
</table>

* MSRP Germany Q1 2017

FUEL CHOICES & SMART MOBILITY SUMMIT - OCTOBER 31ST, 2017 – TEL AVIV
PROVIDE EASY ELECTRIC LIFE

IMPROVED FEATURES

- One class above in **roominess**
- **Flat floor** lay-out (CMF-EV)
- FOTA
- **Autonomous Drive**, progressive introduction

NO MORE RANGE ANXIETY

- **Above 600 km** NEDC
- **≈ 400 km** real motorway range
- Recovery **>230 km** NEDC in **15 min**
GENERATE VALUE FROM ENERGY & MOBILITY SECTORS (1)

**BATTERY SECOND LIFE**

Connect clean energy to grid and buildings

*Ex: High power charging station with Connected Energy in Europe*

**CARSHARING**

Engage in main cities car-sharing projects

*Ex: 500 ZOE with Ferrovial in Madrid*
Pilot home charging to match electricity operators needs 25% stake in JEDLIX

Launch of Renault Z.E. Smart Charge Apps.

SMART CHARGING
GROUPE RENAULT’S NEW SUBSIDIARY

RENAULT ENERGY SERVICES

Favour the expansion of electric mobility
Invest in the field of smart grids
THANK YOU