

Transportation Electrification

*The EV Market, Utility
Actions, Challenges, and
the Future*



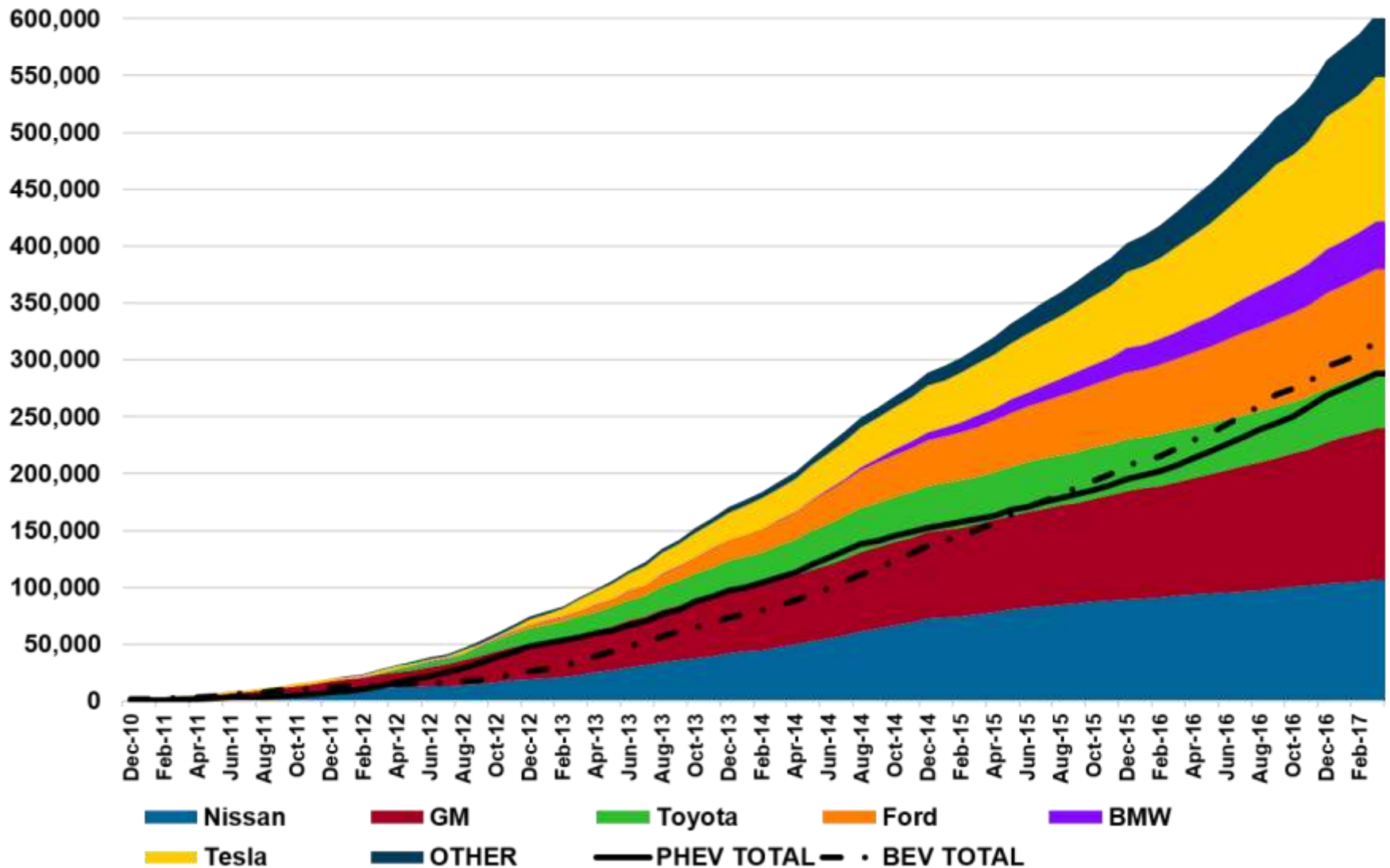
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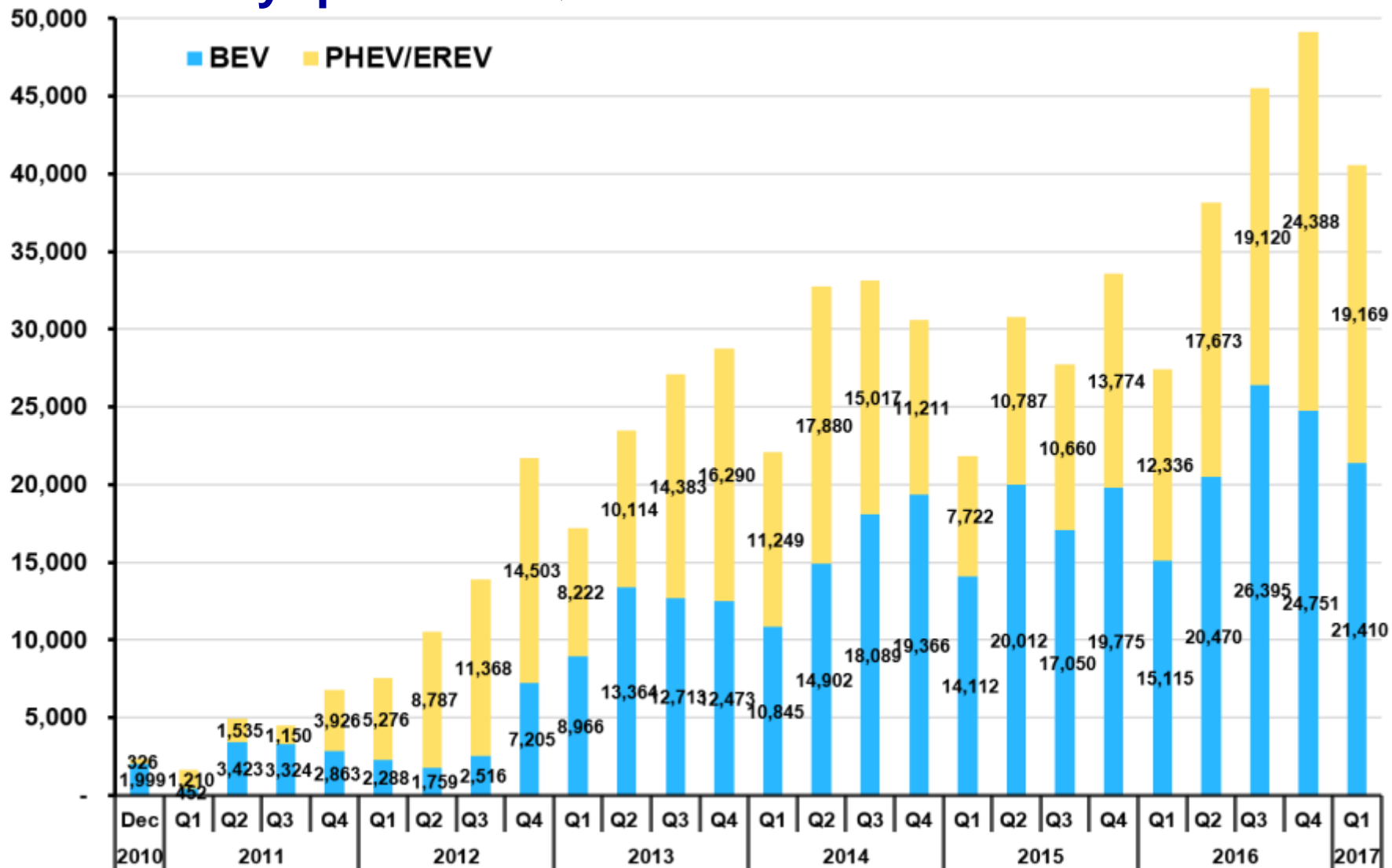
Where are we?

US customers have bought ~604,000 EVs (March 2017)

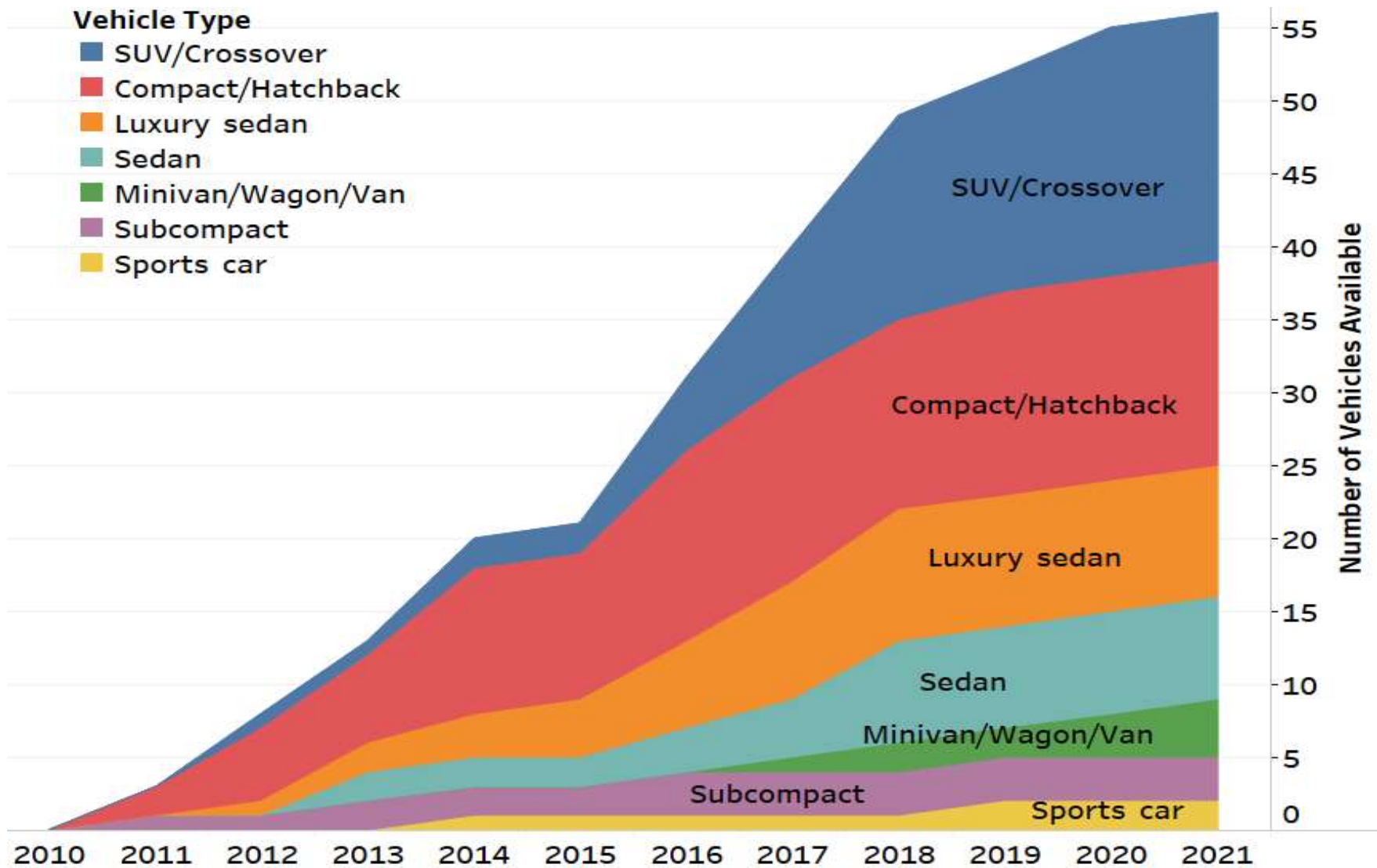


What do the trends look like?

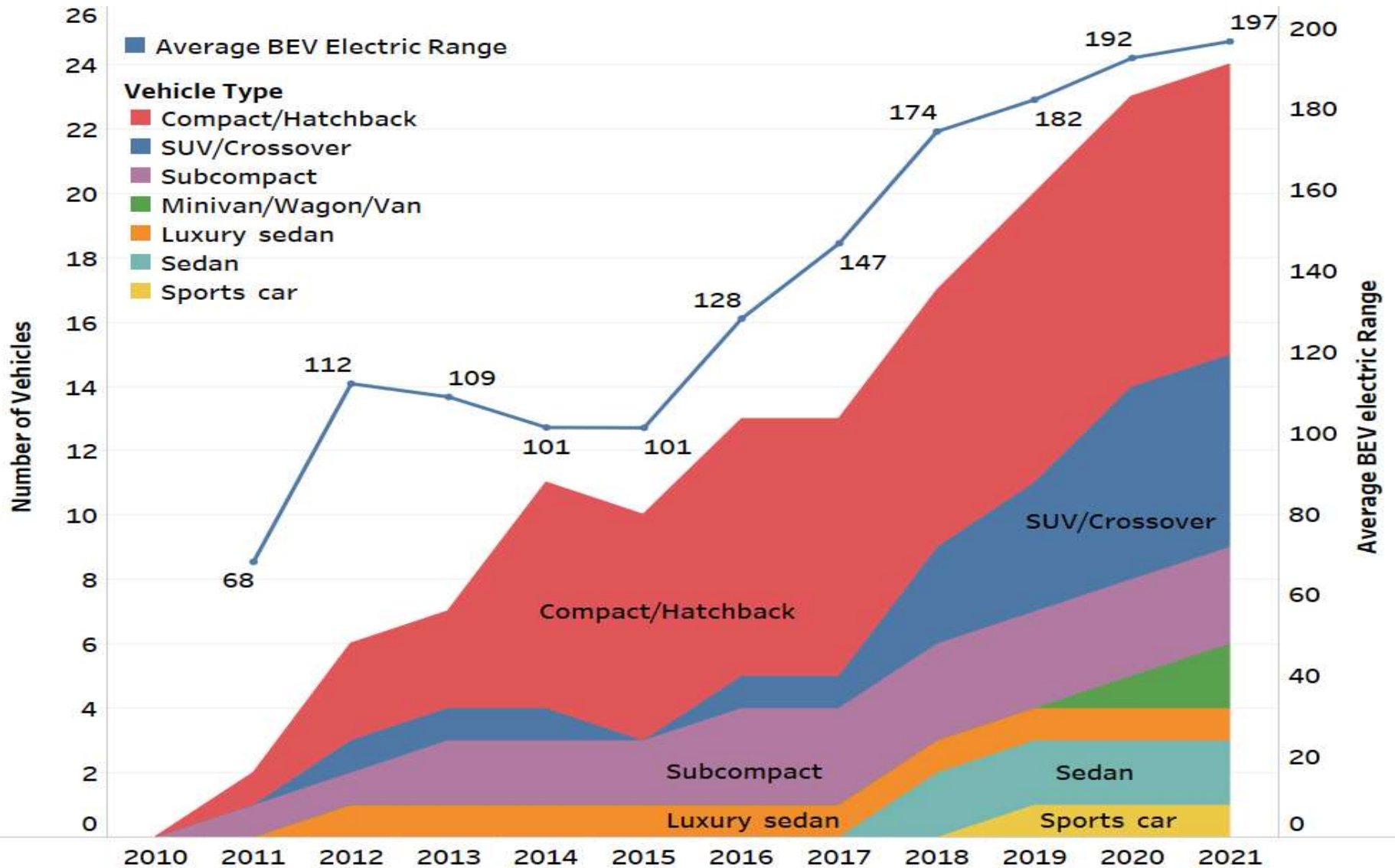
EV sales by quarter – Q1 2017



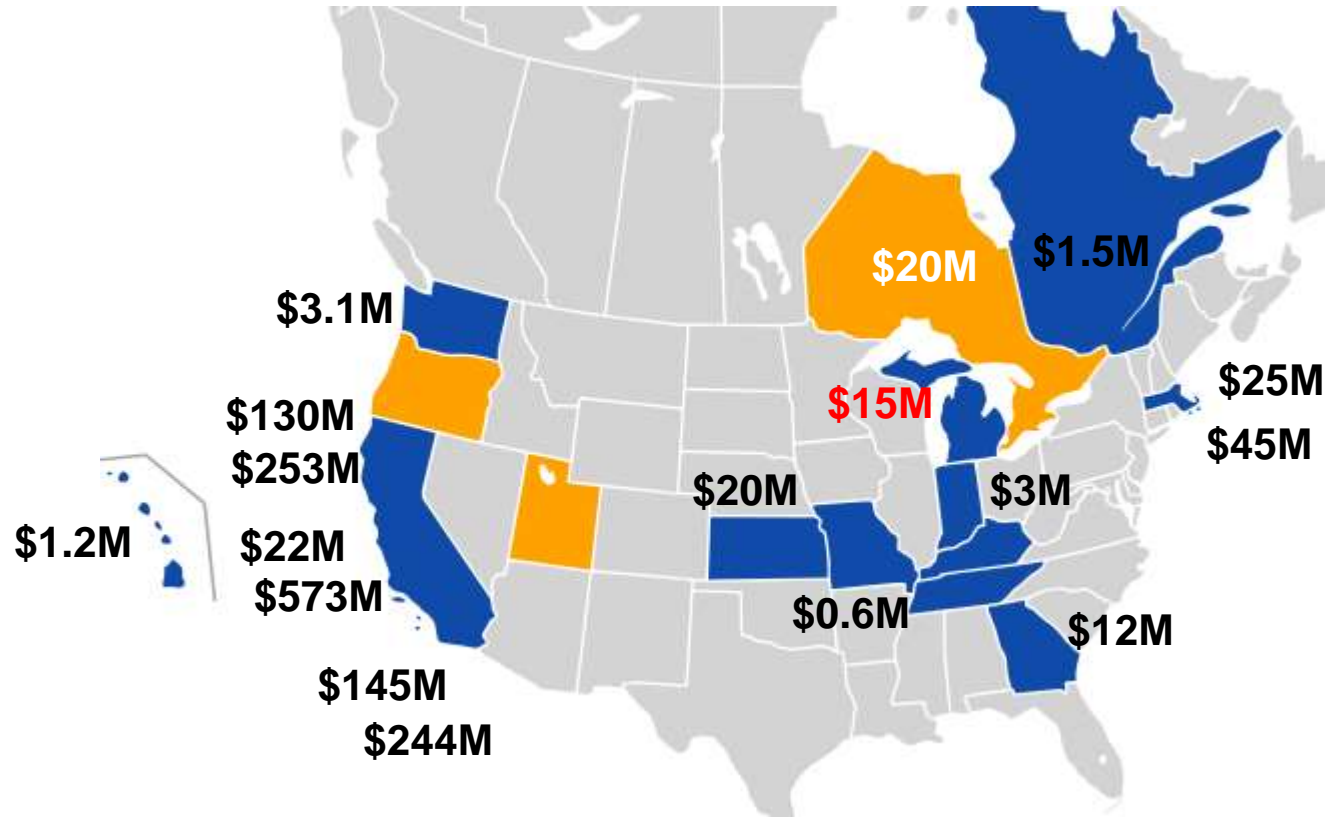
Customer choice increasing with 30+ plug-in electric vehicles arriving 2016 – 2021



Range of fully-electric vehicles is increasing with increasing customer choice



Current utility proposals total ~\$1.4B in EV charging infrastructure



Key Challenges

- EV awareness
- Customer education
- Public charging infrastructure (easy to find, easy access, reliability, easy to use, clear pricing)

■	Utility EV charging infrastructure pilot
■	Legislative direction to utilities

Where we have been



Where we are today and where we are going

Time
↓

- 200+ mile mass-market BEVs
- High power charging
- Autonomous driving





Together...Shaping the Future of Electricity