

THE °CLIMATE GROUP

BUSINESS DRIVING DEMAND FOR ELECTRIC VEHICLES

EV100 Progress and Insights
Annual Report, February 2019

EV **100** by THE °CLIMATE GROUP



**“WE BELIEVE EV100 IS DESTINED
TO TRANSFORM GLOBAL
MARKETS AND POLICIES.”**

- Prashant Kumar, DMD (HR) &
Corporate Development Officer,
State Bank of India

EV 100

by THE CLIMATE GROUP

The Climate Group's EV100 initiative brings together forward-looking companies committed to accelerating the transition to electric vehicles (EVs). The Climate Group harnesses their combined purchasing power to build EV demand and speed up market change.

FOREWORD



**Helen Clarkson, Chief Executive Officer,
The Climate Group**

Transport is a rapidly growing contributor to climate change, with emissions increasing by 2.5% per year¹. It is impacting our health; 93% of children are breathing toxic air². But the pace of progress on electric vehicles (EVs) is a great cause for optimism.

Since The Climate Group³ launched EV100⁴ in September 2017, 31 major companies with over US\$0.5 trillion in combined revenue have joined to accelerate the transition to EVs. Including a unique customer fleet commitment by LeasePlan, we are now targeting the electrification of more than two million vehicles by 2030. I congratulate all our members on their leadership.

This report shines a light on companies' fleet and charging commitments. It identifies climate action as a key driver, alongside the opportunity to be seen as a leader, and a rapidly maturing business case – battery pack costs have fallen by 85% since 2010⁵.

The analysis covers the 23 members who joined by fall 2018 (detailed in the annex). Despite identifying barriers such as lack of available vehicles and charging, these companies are switching at speed, sending a clear demand signal to the marketplace.

Already, more than a dozen countries have pledged to phase out the internal combustion engine⁶, and the number of EV models is expected to double by 2022⁷. 82% of members are using renewable energy in their EV charging, accelerating the clean energy transition more broadly.

But we know we need to go further and faster to keep warming below 1.5°C. With costs falling fast and air pollution at crisis levels, now is the time for every major company to step up and ready themselves for an electric future.

EV100 IN NUMBERS:

145,000

**vehicles to transition to EV
by 23 members (verified data)**

1.8 MILLION

**vehicles in LeasePlan's customer fleet
to be net zero emissions**

70,000

**vehicles (provisional data) being
transitioned to EV by companies joining
EV100 since September 2018**

2 MILLION+

Current vehicle electrification target

INTRODUCTION TO EV100

The Climate Group launched EV100 with the aim of making EVs ‘the new normal’ by 2030.

By the end of its first year (September 2018), EV100 had brought together 23 leading companies committed to electrifying 145,000 vehicles across their operations by 2030. This report analyzes their commitments.

EV100 has since grown to 31 companies (February 2019), adding demand for an extra 70,000 EVs (provisional data).

In addition, LeasePlan has pledged to achieve net zero emissions across its entire customer fleet – 1.8 million vehicles – taking the total target to more than two million.

We recognize different solutions work for different companies. The term ‘EV’ includes pure battery electric vehicles (BEVs), plug-in hybrid electric vehicles (PHEVs), extended-range electric vehicles (EREVs) and hydrogen fuel cell electric vehicles (FCEVs), which must all have a minimum 30 mile/50km electric range.

Many members are also installing charging infrastructure to encourage wider EV uptake among customers and staff. EV100 companies reporting in September 2018 will provide access to charging for more than 630,000 employees.

WHY JOIN EV100?

EV100 continues to grow, spanning a wide range of sectors from postal and logistics to retail and telecommunications. Whatever your business, switching to EVs is a practical step toward reducing your company’s carbon footprint.

The Climate Group harnesses the collective purchasing power of EV100 members to build EV demand and send a clear signal to the market. Along with forward-thinking states, regions and cities, EV100 members are showing manufacturers they want a faster transition to EVs.

EV100 provides a platform for committed companies to showcase their leadership, share best practice, and engage with the policymakers, industry players and investors who are shaping EV markets. By championing the benefits, our members inspire others to step up.

Contact EV100@theclimategroup.org

KEY FINDINGS

145,000 VEHICLES BEING SWITCHED TO EV BY 2030

6.6 MILLION METRIC TONS CO2E SAVED BY 2030

632,000 EMPLOYEES TO HAVE ACCESS TO CHARGING INFRASTRUCTURE

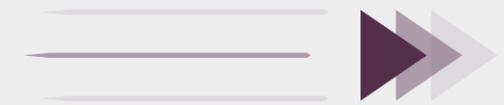


SNAPSHOT OF EV100 MEMBERS:

<p>Our report covers</p> <p>23 MEMBERS</p> <p>joined as of</p> <p>Sept. 2018</p>	<p>They operate in</p> <p>66 MARKETS</p>	<p>They span</p> <p>8 DIFFERENT SECTORS</p>	<p>Their combined revenue is</p> <p>US\$477 BILLION</p>
---	---	--	--

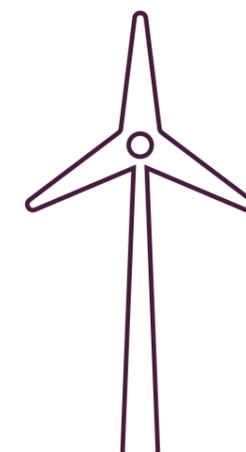
SPEED OF PROGRESS:

10,000 COMMITTED VEHICLES (8%) HAVE ALREADY BEEN SWITCHED TO EV



KEY DRIVERS FOR EV UPTAKE:

1. REDUCING GHG EMISSIONS
2. LEADING THE EV TRANSITION
3. REPUTATIONAL BENEFITS
4. REDUCING LOCAL AIR POLLUTION
5. FINANCIAL SAVINGS



82% of EV100 members already power at least some of their EV charging with renewable or zero-carbon energy.

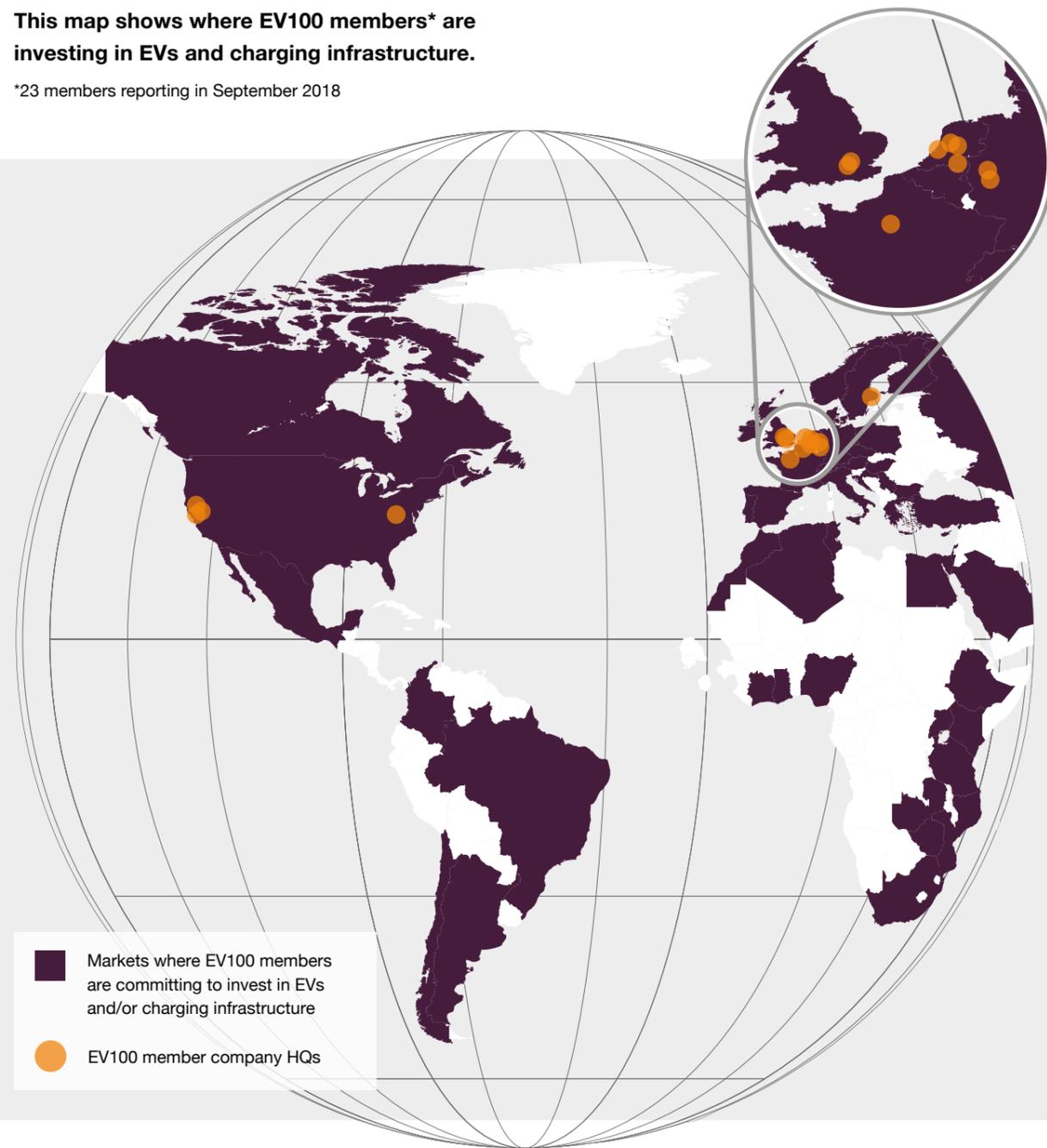
MEMBERS SIGN UP TO ONE OR MORE OF FOUR GLOBAL COMMITMENTS TO 2030:

- | | |
|---|--|
| <p>1. EV integration into directly controlled (owned/leased) fleets</p> <ul style="list-style-type: none"> • 100% of vehicles up to 3.5 tonnes (7,000 lbs) to be EV • 50% of vehicles from 3.5 tonnes-7.5 tonnes (7,000-15,000 lbs) to be EV • Alternative for logistics companies: all urban/last mile delivery to be EV | <p>3. Supporting EV uptake by staff</p> <ul style="list-style-type: none"> • Charging infrastructure installed at all relevant premises • Dedicated awareness program/incentive schemes to promote EV usage |
| <p>2. EV in service contracts (e.g. daily rental, contracted taxi providers, car sharing)</p> | <p>4. Supporting EV uptake by customers</p> <ul style="list-style-type: none"> • Charging infrastructure installed at all relevant premises • Dedicated customer engagement program to promote EV usage |

EV100 MEMBERS BY REGION AND MARKET

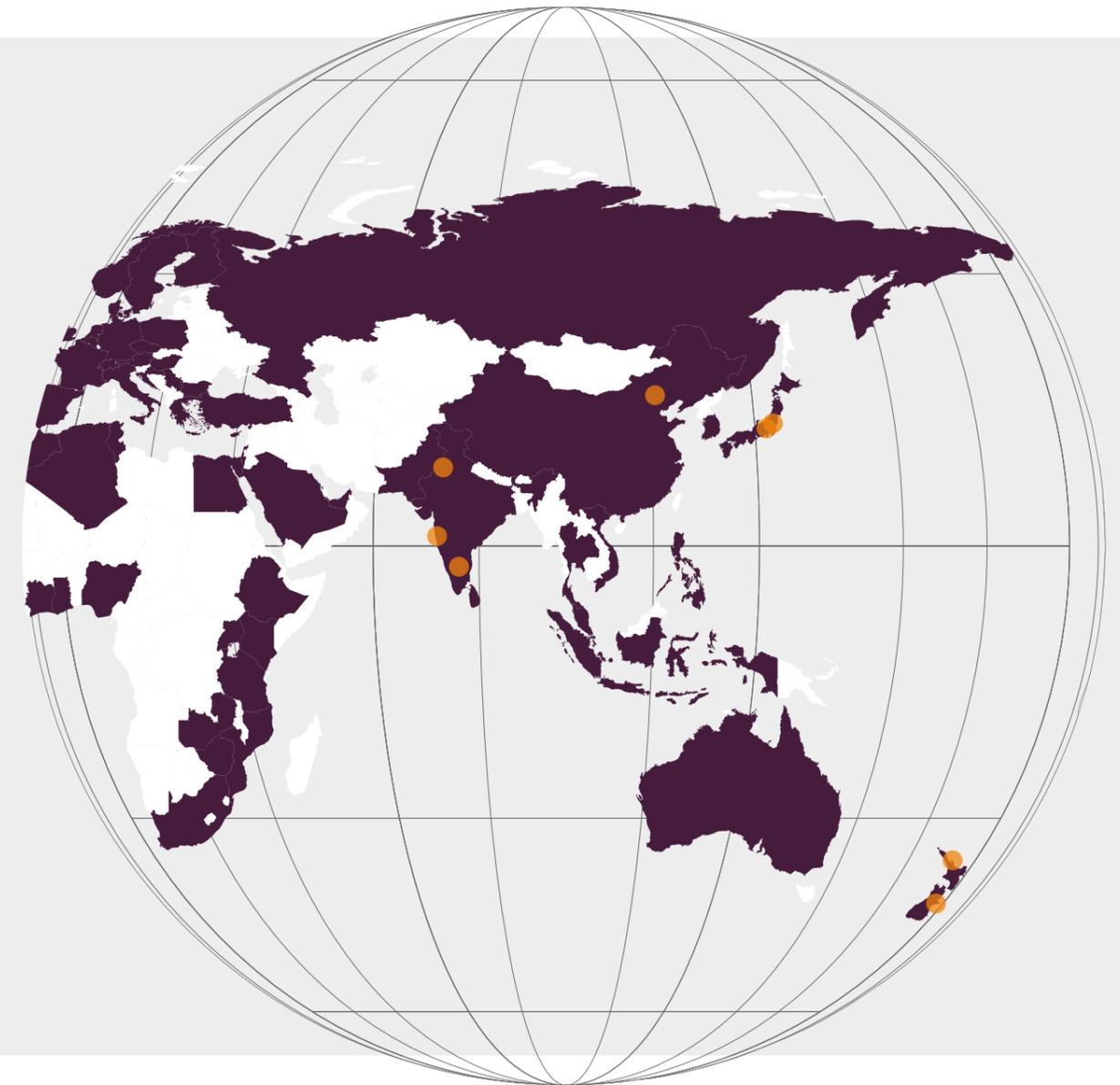
This map shows where EV100 members* are investing in EVs and charging infrastructure.

*23 members reporting in September 2018



66 markets influenced by EV100
2,000,000 employees globally

145,000 vehicles being switched
2,000 sites committed for charging



REGIONAL IMPACT

	Africa	Asia & Middle East	Europe	North America	Oceania	South America
Headquarter offices (HQs)	-	6	10	4	3	-
Committed vehicles	730	9,069	101,940	12,724	743	2,271
Committed sites for charging	3	488	827	324	363	4

TOP EV100 MARKETS

No. of committed vehicles		No. of committed sites for charging		No. of HQs	
Germany	52,786	New Zealand	351	Netherlands & USA	4
France	28,763	USA	304	India & New Zealand	3
USA	8,740	India	245	Germany, Japan & UK	2

DRIVERS FOR ACTION

There are numerous drivers for a company to switch to EVs. EV100 members cite both environmental and conventional business reasons, with reducing GHG emissions, leading the EV transition, reputational benefits, tackling air pollution, and financial savings being the top five.

A survey of the first 23 members shows climate change and air pollution are considered to be ‘very significant’ or ‘significant’ by 96% and 79% of respondents respectively. While the climate benefits of EVs have long been understood, the need to tackle air pollution is increasingly important.

With the economic cost of air pollution estimated at US\$2.6 trillion annually⁸, 26 global cities have now pledged to set up zero emission zones by 2030 through the C40 Green and Healthy Streets (Fossil Fuel Free Streets) Declaration⁹. These policy signals are influencing leading businesses to act.

Deutsche Post DHL Group (DPDHL) aims to operate 70% of its first- and last-mile services with clean pick-up and delivery solutions by 2025. **Ingka Group (formerly IKEA Group)** is committed to 100% zero emission last-mile deliveries by 2025, starting with Amsterdam, Los Angeles, New York, Paris and Shanghai by 2020 – and has already achieved the latter one year early.

“IT’S CRUCIAL TO GROW OUR BUSINESS IN A SUSTAINABLE WAY – THAT’S WHY WE’RE SPEEDING UP THE TRANSITION TO EV IN FIVE INNER CITY AREAS.”

- Jesper Brodin, CEO, Ingka Group

Leadership and reputation are also ‘very significant’ or ‘significant’ motivations (96% and 84% of members respectively). Pioneers of new solutions such as EVs tend to look long term, seeking to safeguard enduring corporate value by positioning themselves ahead of the curve on vital societal shifts.

ELECTRIC VEHICLES MAKE GOOD BUSINESS SENSE

The financial business case will be increasingly important in the years ahead. EVs are expected to reach price parity with internal combustion engine vehicles (without subsidies) by 2024¹⁰.

This is due to the plummeting costs of EV batteries, following a similar cost curve to solar power. Battery pack prices fell by 85% between 2010 and 2018, from US\$1,160/kWh to US\$176/kWh¹¹.

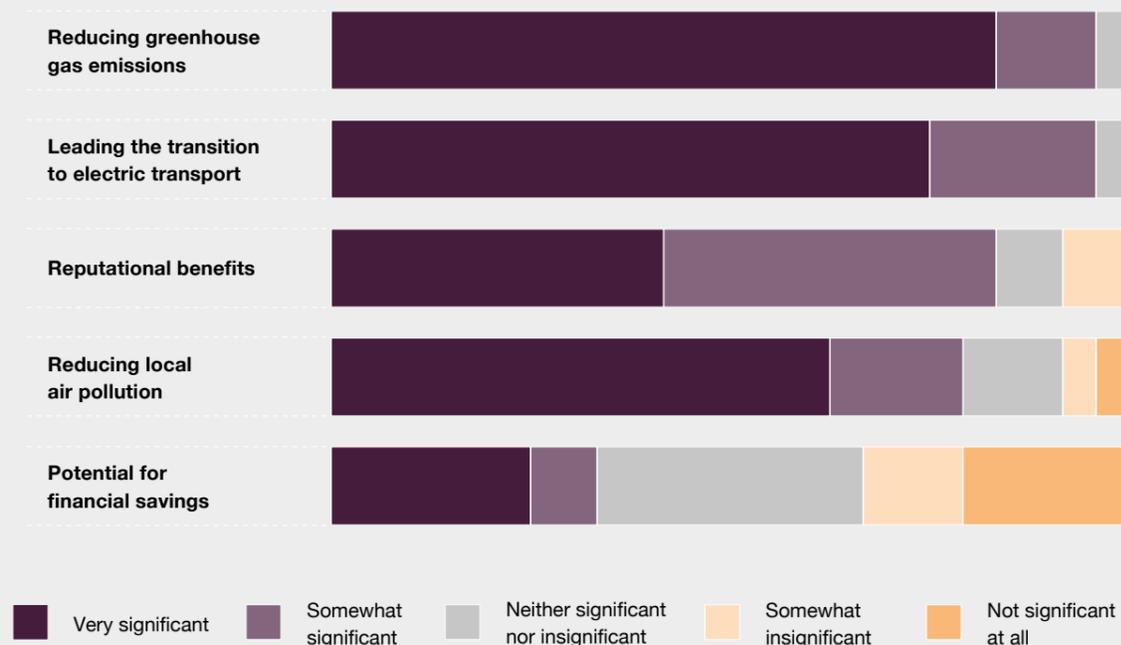
In some markets, EVs are already competitive with other vehicles on a total cost of ownership (TCO) basis, especially for vehicles with high usage rates.

This is partly because electricity is cheaper than fuel, partly because EVs have fewer moving parts and require less maintenance, and partly thanks to supportive government policies.

“MOST PEOPLE ARE STILL SURPRISED WHEN THEY DISCOVER THAT ELECTRICITY COSTS 30 CENTS A LITRE COMPARED TO PETROL, WHICH IS AROUND TWO DOLLARS.”

- Fraser Whineray, CEO, Mercury

TOP FIVE DRIVERS FOR GOING ELECTRIC



STREETSCOOTER EVS ARE ALREADY SAVING DPDHL MONEY COMPARED TO STANDARD VEHICLES



DPDHL StreetScooter. Credit: DPDHL



60-70%
savings on fuel costs



60-80%
savings on maintenance and repair costs

CASE STUDY: INGKA GROUP



EV charging at an IKEA store. Credit: Ingka Group

For Ingka Group (formerly IKEA Group), sustainability is good business. Rolling out EVs future proofs its operations and lowers business risk from air quality legislation and zero emission zones, which are increasingly restricting access to city centers for polluting vehicles. If Ingka Group cannot deliver its products in these locations, it cannot reach a large part of its customer segment.

As a result, Ingka Group has shown that making no changes to its fleet would be more expensive than making the transition to electric. If IKEA Amsterdam is not 100% electric by 2025, for example, Ingka Group will lose direct access to more than 390,000 households and US\$30.2 million revenue per year, due to expected future limits on vehicle emissions in Amsterdam's city center.

Framing the shift to zero emission last mile deliveries as not only a sustainability concern, but in fact crucial for the business and a pre-requisite for growth, has created a sense of urgency within Ingka Group. It has also shaped the direction of conversations with service providers and other partners, allowing the company to identify the right solutions for its different market

operations, with electric rickshaws in India being one example.

Ingka Group is now fast-tracking EV roll-out in Amsterdam, Los Angeles, New York, Paris and Shanghai, where the company aims to be electric for all last-mile delivery by 2020 - and has achieved the latter one year early. The five cities will function as trials for the global transformation by 2025.

“IT IS QUITE POSSIBLE TO DRIVE FROM ONE END OF ITALY TO THE OTHER IN AN ELECTRIC CAR CHARGING ONLY AT IKEA FACILITIES. WE’VE DONE IT.”

- Angela Hultberg, Head of Sustainable Mobility, Ingka Group

BARRIERS TO THE EV TRANSITION

A lack of charging infrastructure is cited as a ‘very significant’ or ‘significant’ barrier by 71% of EV100 members. The barriers with the highest ‘very significant’ scores are the current up front cost of EVs (33%) and the lack of EV options in key markets (24%).

Joining EV100 helps to increase demand for EVs, increase their availability and bring down costs for everyone. The Climate Group is taking further steps to land this market signal with the auto industry. The Zero Emission Vehicle (ZEV) Challenge¹² brings together leading businesses, cities, states and regions in a call to action to the auto industry to accelerate the roll-out of EVs.

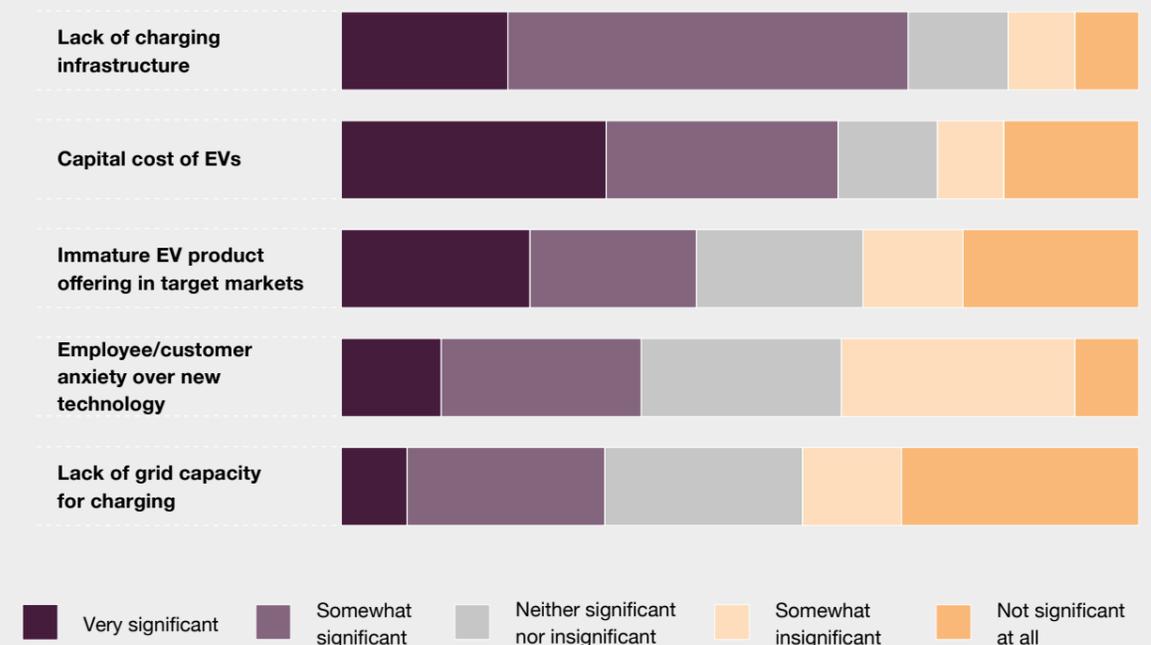
As Tex Gunning, CEO of LeasePlan, explains: “Although we’re seeing the appetite for EVs rise every day, the vehicles, infrastructure or policies to meet this demand aren’t there yet. We’re therefore delighted to join the global ZEV Challenge and work with the industry to make zero emissions a reality.”



“ONE OF THE BIGGEST CHALLENGES IS THE LACK OF COMMERCIAL OPTIONS FOR PLUG-IN ELECTRIC PICKUP TRUCKS AND CLASS 3-5 TRUCKS, A LARGE PORTION OF OUR FLEET.”

- Chris Benjamin, Director, Corporate Sustainability, PG&E

TOP FIVE BARRIERS TO GOING ELECTRIC



FLEETS BEING TRANSITIONED

Through their core fleet commitments reported in September 2018, EV100 members have committed to electrify 145,000 vehicles by 2030 – in other words, retire this many fossil fuel vehicles and replace them with EVs. This is more EVs than existed worldwide as recently as 2011.

It is not just cars that are being electrified. **PG&E** has pioneered plug-in hybrid bucket trucks that reduce idling, fuel use and emissions. **Ingka Group** has deployed electric cargo bikes as well as fully electric heavy goods vehicles. **Baidu** has started to roll out self-driving electric buses, and **Vattenfall** owns the sole hydrogen vehicle in EV100 so far.

Despite members identifying market immaturity as a key barrier to progress, especially for commercial vehicles, they are nevertheless expressing significant demand for this segment. Members have pledged to source a further 87,000 electric commercial vehicles by 2030, almost double the number of passenger vehicles (44,000).

Several members are also working to influence the companies they do business with. Over half of EV100 members making service contract commitments now require EVs from taxi and car rental providers. This is often part of a broader sustainable business travel policy – **METRO AG** and **Unilever** also actively encourage employee car sharing.

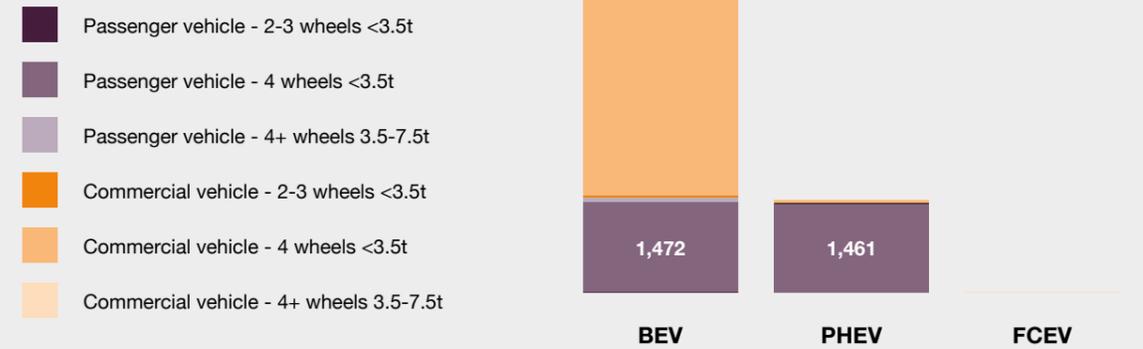
LeasePlan has also made a unique customer fleet commitment covering 1.8 million vehicles.



Royal HaskoningDHV workplace charging. Credit: Royal HaskoningDHV

EV100 MEMBERS' EV FLEETS IN DETAIL

EV100 members are sourcing more electric commercial vehicles than passenger vehicles, and buying far more BEVs than PHEVs or FCEVs.



	Vehicle type	BEV	PHEV	FCEV
Passenger vehicles	2-3 wheels <3.5t	8	0	0
	4 wheels <3.5t	1,472	1,461	0
	4+ wheels 3.5-7.5t	86	0	0
Commercial vehicles	2-3 wheels <3.5t	27	0	0
	4 wheels <3.5t	6,843	62	1
	4+ wheels 3.5-7.5t	64	5	0
Total		8,500	1,528	1

10,000
EVs DEPLOYED



2030

Members have already electrified more than 10,000 vehicles (8% of their committed total)

COMPANIES LEADING THE WAY

Three largest fleet commitments

DHL	66,390
EDF	31,303
Unilever	13,336

Top three fleet conversions to date

Baidu	100% of 96 vehicles
Mercury	71% of 129 vehicles
Air New Zealand	45% of 171 vehicles

ENABLING EV CHARGING

EV100 members reporting in September 2018 have committed to install charging infrastructure at more than 2,000 workplace and customer parking sites around the world, with charging already installed at 429 sites (21%). By 2030, the workplace charging commitments will facilitate EV charging for 632,000 employees. Almost 6,000 charge points have already been deployed for staff and customers, and more than 6,000 to support fleet charging.

Four members have already fully achieved their charging commitments: **AEON Mall** (78 customer sites), **Air New Zealand** (eight customer/office sites), **Heathrow Airport** (one customer/office site) and **Christchurch International Airport Ltd** (one office site).

Three members have already installed charging at over 80% of office sites: **Mercury NZ** (91%), **PG&E** (84%) and **Baidu** (83%). Notable commercial fleet charging deployments (not formally included in the EV100 commitments) include **DPDHL**, with 6,200 chargers for its StreetScooter EVs, and **PG&E**, with fleet charging at 80 company sites.

82% of EV100 members surveyed already power at least some of their EV charging with renewable or zero-carbon energy. For example, **Clif Bar** has a 400kW solar system at its headquarters in California. **Royal HaskoningDHV** is using energy certified as '100% sourced from Dutch wind'.

The workplace charging commitment is not just about technology. However, it is also about engaging employees to travel in an environmentally responsible way. **Royal HaskoningDHV** is helping its staff commute by EV by offering free home charge point installations for

employees with BEVs. **Clif Bar's** 'Cool Car' program offers staff up to US\$6,500 toward a hybrid or electric car for commuting, which has been taken up by one third of their workforce.

Bank of America operates a similar incentive, offering up to US\$3,000 off a BEV or FCEV, which has already been used by more than 600 employees. Employee uptake of the program has increased by 40% since the company started installing workplace charge points, and at some sites the number of EV drivers has increased tenfold.

“IF EVERY INDIVIDUAL MAKES EVEN A SMALL CHANGE – LIKE THE WAY YOU COMMUTE – YOU MIGHT CONVERT ONE PERSON TO DO THE SAME. AND THEN ANOTHER, AND ANOTHER – AND THAT MATTERS.”

- **Ed Mansourou, Clif Bar employee**

COMPANIES LEADING THE WAY

Three largest charging commitments

METRO AG	773 customer sites and 10 offices
Ingka Group	413 customer sites and six offices
LeasePlan	90 offices

Top three charging deployments to date

Ingka Group	296 customer sites and one office
AEON Mall	78 customer sites
METRO AG	53 customer sites and five offices

CASE STUDY: LEASEPLAN

LeasePlan has made a unique EV100 commitment by not only pledging to transition its own employee fleet to electric by 2021, but by also targeting net zero emissions from its entire 1.8 million vehicle customer fleet by 2030. The business case is clear; as a leasing company, it wants to provide the cars people want to drive, and people want to drive EVs.

Emissions reductions are a key driver for LeasePlan's clients to opt for EVs, and many are citing the need to ready themselves for zero emission zones in cities. As EVs increasingly become a requirement in tenders for contracts, service firms looking to win government or airport contracts also face a potential loss of business opportunity from not electrifying their fleets.

To support its customers, LeasePlan encourages them to 'think big, start small and go electric'. The company facilitates the uptake of zero emission vehicles in its customer fleet by offering its clients a pilot project ahead of permanently making the switch. LeasePlan provides the cars, the charging infrastructure at offices and homes, and the impact assessments for its corporate customers.

The results have been overwhelmingly positive, with most customers going on to permanently incorporate EVs into their fleets, and registrations of battery EVs in LeasePlan's customer fleet growing by 77% in those countries where EV pilots are offered. For the entire vehicle customer fleet, LeasePlan expects a 40%-60% annual growth in EVs for the upcoming years.

1.8M

VEHICLES TO BE NET ZERO EMISSIONS BY 2030

“WE ENCOURAGE OUR CUSTOMERS TO ‘THINK BIG, START SMALL AND GO ELECTRIC.’”

- **Tex Gunning, CEO, LeasePlan**

CASE STUDY: METRO AG

German retailer METRO AG will install charging infrastructure at all of its 773 sites and offices worldwide. By doing so, the wholesale and food specialist is increasing the visibility of EVs as a transport solution. It is also mitigating business risk, reducing the company's carbon footprint as well as grasping new opportunities for customer engagement.

By installing charging points, METRO AG offers an added service, leading to higher retention rates among sustainability conscious customers. In Germany, customers stay at METRO AG stores for an average of 30 minutes, enough time to charge their car with more power than they use to get there and back.

Even in Bulgaria, a less developed EV market, METRO AG has installed EV infrastructure at eight out of its 11 stores already. It also offers an added benefit for customers: those who arrive at the METRO AG Sofia store by bus can rent a METRO AG EV to bring their goods home and then return it at their next store visit. Through this offer, METRO AG is directly contributing to grow uptake and awareness of EVs and help accelerate market growth. In other countries, METRO AG's roll-out of EVs is progressing as well, leading to an approximate 140% increase of installed chargers.

METRO AG electric van charging at a METRO facility.
Credit: METRO AG



“WITH EV100 WE ARE PROUD TO SUPPORT THE MOVE TOWARDS CLEANER ENERGY AND CITIES.”

- Heiko Hutmacher, Chief Human Resources Officer, METRO AG

METRO AG EV charging station.
Credit: METRO AG



EV CHARGING BOOSTS BUSINESS

EV charging is a service that can be sold to customers for a profit. However, it is increasingly common to view EV charging not as a transaction, but as a way of adding value to a business by attracting and retaining high-value workers and customers.

The clearest parallel is Wi-Fi. In the early 2000s, public Wi-Fi was often sold to customers on a subscription or pay as you go basis. Now, it is almost always free. This is because retail, catering and hotel businesses realize that free Wi-Fi is a great way to boost market share, increasing foot traffic to their sites by offering an attractive consumer experience.

EV charging has the same effect at shopping centers, retail sites and hotels. Customers are coming to expect EV charging as standard, and early movers (such as **AEON Mall, Ingka Group** and **Metro AG**) have a great opportunity to increase customer value and boost market share.



Similarly, companies can attract and retain the best talent in their workforce by offering attractive employee benefits that reflect their values – as is the experience of **HP Inc.**

Innovative charging solutions such as smart charging and vehicle-to-grid, which can offer valuable grid balancing services, present unique new commercial opportunities. These are especially valuable at sites where EVs are parked for a long time, such as airports.

CASE STUDY: HP INC.

HP Inc. has already installed charging stations at 20% of its global office locations and is proactively tracking the demand among its employees. This is not only a way for HP to bring down emissions from employee travel, but also an added value offer for staff.

Sustainability ranks as one of the top three reasons why HP employees enjoy their workplace. With 20% of employees at the Palo Alto headquarters planning to buy an electric vehicle within the next two years, installing charging facilities is an important way for HP to offer benefits that appeal to the values and lifestyle of current and future employees.



Workplace charging offered by HP Inc.
Credit: HP Inc.

LOOKING AHEAD: EV100 SET TO SHIFT MARKETS BY 2030

As businesses increasingly switch to EVs to deliver on emissions reduction goals, lower business risk and realize commercial benefits, any companies not yet thinking this way are at risk of being left behind.

For manufacturers bringing forward products to meet growing demand, there are major contracts to be won. Volkswagen is the first to announce its exit from the internal combustion engine market, and The Climate Group expects others to follow.

While the private sector is vital to accelerating the transition, companies cannot achieve their EV100 goals without the support of policymakers – from national governments to regions and cities, who share the same overall objectives.

Judicious balancing of carrots and sticks is key. The internal combustion engine vehicle phase-outs announced by more than a dozen countries, and zero emission zones to be established by over two dozen cities, have set clear markers on the direction of travel.

These must work in harmony with suitable incentives to promote and mainstream EVs, which should be gradually reduced as the industry matures and EVs approach price parity with internal combustion engine vehicles.

There is no room for complacency. In spite of the rapid growth of EVs in recent years, the transition needs to accelerate dramatically to limit global warming to 1.5°C.

EV100 will continue to grow and strengthen its demand signal, accelerating the market transition. EV100 members are also bringing their customers and employees with them on the journey, showing that EVs are not just for the distant future, but here already, and here to stay.

ANNEX

EV100 MEMBERS DATA TABLE (SEPTEMBER 2018)

Company	HQ location	Joining year	Fleets		Service contracts	Workplace charging		Customer charging	
			Vehicles covered by EV100 fleet commitment	Vehicles already converted to EV (%)		Office sites covered by EV100 workplace charging commitment	Office sites with charging already installed (%)	Customer sites covered by EV100 customer charging commitment	Customer sites with charging already installed (%)
AEONMALL**	Japan	2017						78	100%
Air New Zealand	New Zealand	2018	171	45%	No	8	100%	8	100%
ASKUL Corporation	Japan	2017	311	4%					
Baidu	China	2017	96	100%		6	83%		
Bank of America	USA	2018				62	58%		
BSES Yamuna Power Ltd	India	2018	100	8%	Yes	15	7%		
Christchurch International Airport Limited	New Zealand	2018	23	39%		1	100%	5	20%
Clif Bar & Company	USA	2018	51	0%		6	33%		
Deutsche Post DHL Group*	Germany	2017	66,390	8%	No	N/a	N/A		
EDF Group	France	2017	31,303	7%					
Heathrow Airport	United Kingdom	2017	217	31%	Yes	1	100%	1	100%
HP Inc.	USA	2018				88	19%		
Ingka Group	Netherlands	2017	12,783	7%	Yes	6	17%	413	72%
LeasePlan	Netherlands	2017	2,448	1%		90	23%		
Mercury New Zealand	New Zealand	2017	129	71%	No	23	91%		
METRO AG**	Germany	2017			Yes	10	50%	773	7%
Pacific Gas and Electric Company**	USA	2017				38	84%		
Royal HaskoningDHV	Netherlands	2017	567	13%	Yes	75	13%		
Signify*	Netherlands	2018	1,978	2%		0	0%		
State Bank of India	India	2018	1,791	0%	No	50	0%		
Unilever	United Kingdom	2017	13,336	1%	Yes	50	22%		
Vattenfall AB	Sweden	2017	4,500	11%	No	33	73%		
Wipro Limited	India	2018	2,000	2%		8	38%		

* Reporting period Jan 1 - December 31, 2017. All other members 12 months from April 1, 2017 to September 30, 2018.

** Three members also reported EV deployment in their vehicle fleets despite only formally being signed up to charging commitments. These are PG&E with 1,043 EVs, METRO AG with 30 and AEON Mall with four.

ACKNOWLEDGEMENTS

We would like to thank the 23 EV100 members who participated in our first annual reporting process: AEON Mall, Air New Zealand, ASKUL Corporation, Baidu, Bank of America, BSES Yamuna Power Ltd, Christchurch International Airport Limited, Clif Bar & Company, Deutsche Post DHL Group, EDF Group, Heathrow Airport, HP Inc., Ingka Group (formerly IKEA Group), LeasePlan, Mercury New Zealand, METRO AG, Pacific Gas and Electric Company (PG&E), Royal HaskoningDHV, Signify, State Bank of India, Unilever, Vattenfall AB, Wipro Limited.

Since our annual reporting process, we have welcomed eight additional members to EV100, bringing our total membership up to 31. These companies, who will feature in next year's EV100 Progress and Insights Annual Report are: BT, Delta Electronics, E.ON, Genesis Energy, Nippon Telegraph and Telephone Corporation (NTT), Ontario Power Generation, Port Authority of New York & New Jersey, Schenker AG.

The Climate Group is grateful for the support of ClimateWorks Foundation, Heising-Simons Foundation and New Venture Fund/We Mean Business.

Content: James Beard, Thomas Maltese, Katrine Petersen, Marie Reynolds, Sandra Roling (The Climate Group)

Regional support: Kristin Hanczor, Yuming Hui, Atul Mudaliar, Ajitraj Singh (The Climate Group)

Design: Joanna Vitiv and Oliver Whittall (The Climate Group)

Project management: James Beard (The Climate Group)

Data analysis: Jamie Clark and Myles McCarthy (The Carbon Trust)

Thanks also to our external advisers and reviewers: Ian Featherstone (Energy Saving Trust), Wolfgang Fischer (e-mobil BW GmbH), Sara Forni (Ceres), Marine Gorner (IEA), Nic Lutsey (ICCT) and Takayuki Shibaoka (Japan Climate Leaders Partnership).

GLOSSARY

BEV	- Battery electric vehicle (i.e. fully electric)
CO2(e)	- Carbon dioxide (equivalent)
E-REV	- Extended range electric vehicle
EV	- Electric vehicle (i.e. BEVs, E-REVs, FCEVs and PHEVs)
FCEV	- Fuel cell electric vehicle (i.e. hydrogen vehicle)
GHG	- Greenhouse gas
PHEV	- Plug-in hybrid electric vehicle
ZEV	- Zero emission vehicle (i.e. BEVs and FCEVs)

REFERENCES

1. International Energy Agency, Tracking Clean Energy Progress 2017 www.iea.org/publications/freepublications/publication/TrackingCleanEnergyProgress2017.pdf
2. World Health Organization, Air pollution and child health: prescribing clean air (2018) www.who.int/ceh/publications/air-pollution-child-health/en/
3. The Climate Group, www.theclimategroup.org
4. The Climate Group, EV100 www.theclimategroup.org/project/ev100
5. Bloomberg New Energy Finance, Battery Price Survey (2018)
6. SLoCaT, E-Mobility Trends and Targets (2018) www.slocat.net/sites/default/files/e-mobility_overview.pdf
7. Bloomberg New Energy Finance, Electric Vehicle Outlook (2018) <https://bnef.turtl.co/story/evo2018>
8. OECD, The Economic Consequences of Air Pollution (2016) www.oecd.org/environment/the-economic-consequences-of-outdoor-air-pollution-9789264257474-en.htm
9. C40, Fossil Fuel Free Streets (Green and Healthy Streets) Declaration (2018) www.c40.org/other/fossil-fuel-free-streets-declaration
10. Bloomberg New Energy Finance, Electric Vehicle Outlook (2018) <https://bnef.turtl.co/story/evo2018>
11. Bloomberg New Energy Finance, Battery Price Survey (2018)
12. The Climate Group, ZEV Challenge www.theclimategroup.org/project/zev-challenge



EV100

EV100 is a global initiative by The Climate Group bringing together forward-looking companies committed to accelerating the transition to electric vehicles (EVs), to make electric transport 'the new normal' by 2030. Electric transport offers a major solution to climate change, as well as curbing air and noise pollution. Businesses can lead through their investment decisions and influence on millions of staff and customers worldwide. By joining EV100 they increase demand, drive mass roll-out, and make electric cars more rapidly affordable for everyone. In driving corporate EV uptake, EV100 works closely with regional engagement partners Ceres and Japan Climate Leaders Partnership. Visit: TheClimateGroup.org/EV100

THE CLIMATE GROUP

The Climate Group's mission is to accelerate climate action to achieve a world of no more than 1.5°C of global warming and greater prosperity for all. We do this by bringing together powerful networks of business and governments that shift global markets and policies. We focus on the greatest global opportunities for change, take innovation and solutions to scale, and build ambition and pace. We are an international non-profit organization, founded in 2004, with offices in London, New Delhi and New York. We are proud to be part of the We Mean Business coalition and lead business initiatives on electric vehicles (EV100), renewable energy (RE100), and energy productivity (EP100). Visit: TheClimateGroup.org



THE CARBON TRUST

Established in 2001, the Carbon Trust works with businesses, governments and institutions around the world, helping them contribute to, and benefit from, a more sustainable future through carbon reduction, resource efficiency strategies, and commercializing low carbon businesses, systems and technologies. Headquartered in London, the Carbon Trust has a global team of over 30 nationalities based across five continents.

