



CLIMATE GROUP
EV100

Progress and Insights Report

The EV revolution is here

February 2021



Foreword

One year into the Climate Decade, the need for urgent action has never been clearer. Despite a year of turmoil and uncertainty, the electric vehicle (EV) transition has been growing at speed. With companies making and acting on ambitious commitments and with technology making headway, it is finally time to say the EV revolution is here.

You would be forgiven for thinking that 2020 was going to be a lost year for climate action – business and governments alike were struggling to adapt to everchanging circumstances, and you could imagine that the immediate concerns of the international pandemic would delay pledges to 2030 EV commitments. However, in this unprecedented year, what our members have achieved is remarkable.

Over half of EV100 members say that they have either continued on the same trajectory or, in some instances, sped up their progress towards meeting their commitments. Since our last report, the number of EVs deployed by members has more than doubled, to over 169,000.

On top of this, we are seeing huge progress in the provision of charging infrastructure. In the last year, there has been an 84% increase in the number of locations with charging, and the number of individual charge points has increased by 79%. Given that range anxiety is one of the most often quoted concerns around EVs, these actions go further than just providing charging infrastructure for staff and customers. They are both a physical and a visual challenge to range anxiety concerns and will enable more businesses and individuals to consider switching to electric.

We know that business is crucial in accelerating the switch to EVs. Many new vehicles – about two-thirds in Europe, for example – are bought by companies for their fleets*. So, to see this continued procurement in the face of the pandemic brings us great hope for 2021, in which we – as both individuals and organisations – will hopefully be less restricted.

Just as significantly, we've seen companies focusing their public affairs efforts on pushing for strengthened political ambition. In 2020, the UK Electric Fleets Coalition, a partnership between the Climate Group and BT Group with the support of 28 other businesses, successfully called for the UK Government to bring forward its phase out date for petrol and diesel vehicles to 2030.

With COP26 on the horizon, EV100 members are showing governments globally that a swift transition is possible. Join us today to be part of this revolution.

Helen Clarkson
Chief Executive Officer, the Climate Group

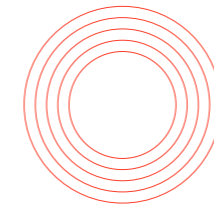
About EV100:

EV100 is a global initiative, led by the Climate Group, bringing together forward-looking companies committed to making EVs the new normal by 2030. Members publicly commit to at least one of the following by 2030:

- Electrifying owned/leased fleets (100% < 3.5t / 50% 3.5 – 7.5t)
- Installing charging at all relevant sites for staff and/or customers
- Requiring EVs in service contracts

Key findings

Scale



101
member
companies

80
markets
worldwide

- = 100,000 vehicles committed
- = 100 charging sites
- = 1 million metric tonnes CO₂e

Over
4.8 million vehicles
committed under EV100

↑ Up 80%



6,500
charging sites committed

↑ Up 103%



75 million metric tons
CO₂e emissions set to be avoided by 2030

↑ Up 80%



Speed



- = 5,000 EVs deployed
- = 100 charging sites installed

169,000
EVs deployed so far

↑ Up 111%



2,100
sites with charging installed

↑ Up 84%



Collaboration



Top drivers

- Reducing greenhouse gas emissions
- Tackling air pollution
- Reputational benefits

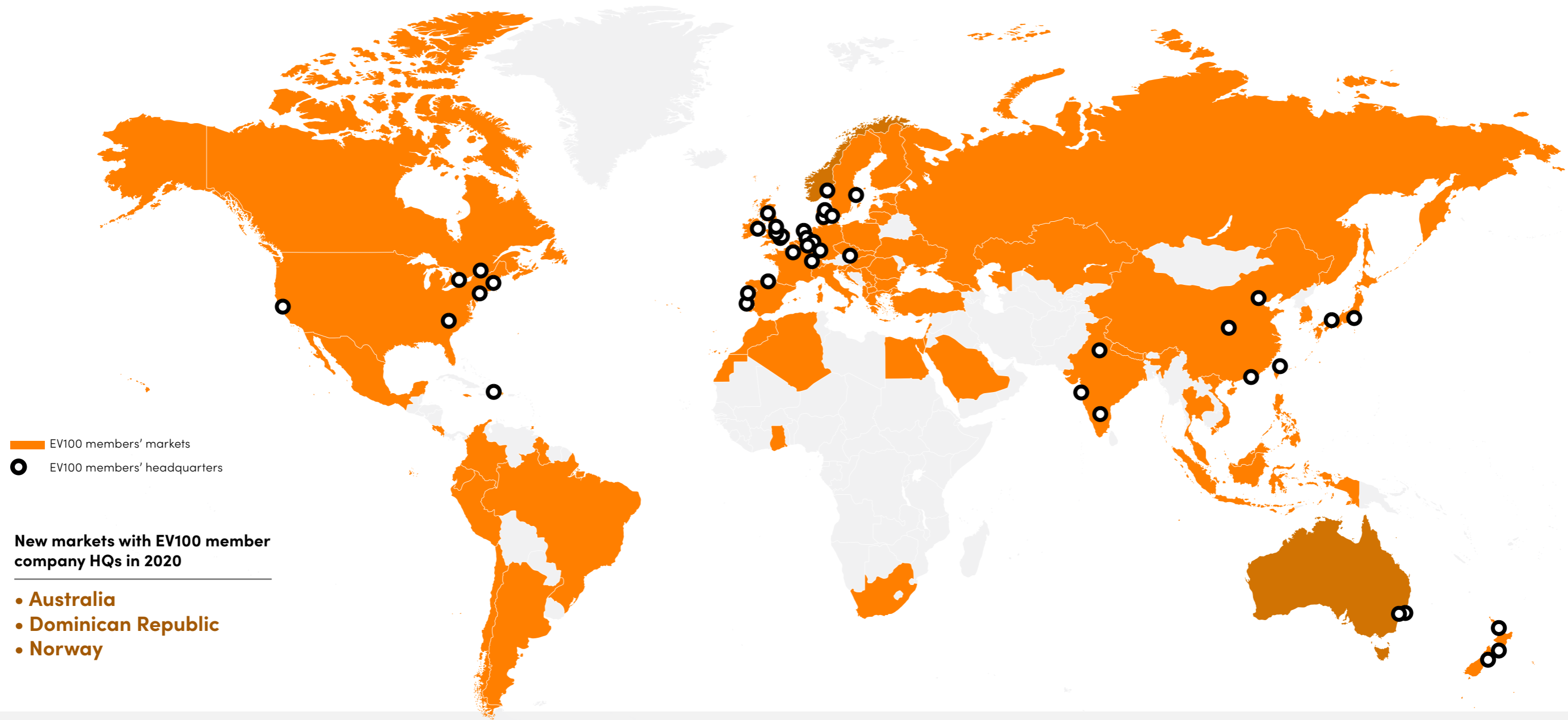
Top barriers

- Lack of charging infrastructure
- Lack of correct vehicle type
- Capital cost of EVs

* All data on members' commitments is for the total membership as of January 27, 2021. All data on progress towards targets, drivers and barriers, and GHG emissions is from the 86 member companies reporting in August–October 2020. For the full data on company commitments and progress see the Members' Summary Table in the Annex.

** Some data pertaining to vehicles committed and electric vehicles deployed may not account for overlap where EV100 members are clients of our leasing company members.

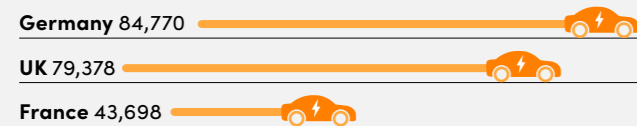
EV100 commitments and progress around the world



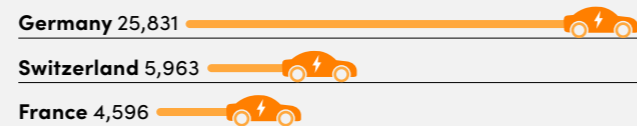
New markets with EV100 member company HQs in 2020

- Australia
- Dominican Republic
- Norway

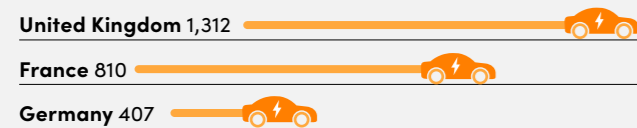
Top markets for corporate fleet commitments



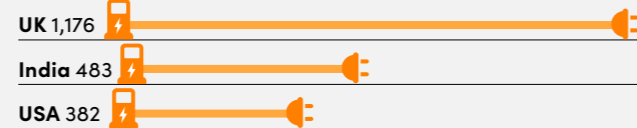
Top markets for corporate fleet EV deployment



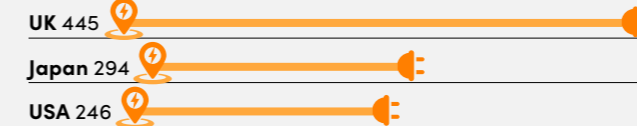
Top markets for corporate fleet EV deployment during the last year



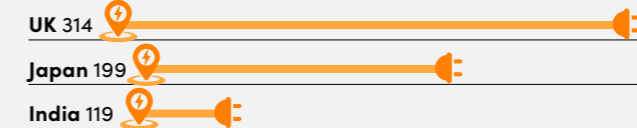
Top markets for charging commitments by locations



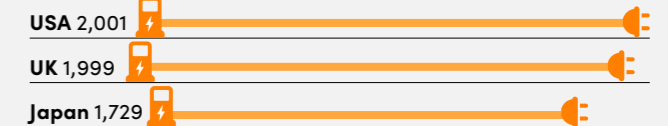
Top markets for locations with charging installed



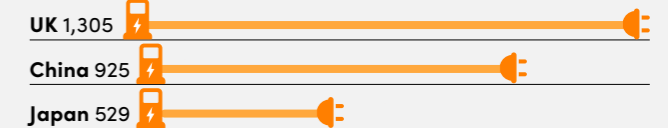
Top markets for locations with charging added during the last year



Top markets for charging points installed



Top markets for charging units deployed during the last year



Scale

Since our last Progress and Insights Report in 2020, we've welcomed 34 new companies to EV100, putting us at 101 members at the time of writing.

Ingka Group has installed charging at 400 locations globally - more than any EV100 member

As a result, we've now expanded the number of vehicles covered by EV100 commitments to over 4.8 million and the number of locations committed to have charging to 6,498.

We were delighted to welcome North American transportation network company (TNC) Lyft to EV100 in 2020, who made an ambitious commitment to reach 100% electric vehicles on its platform by 2030. The commitment of an estimated 2 million vehicles over the course of the decade* is the biggest vehicle-related commitment made under EV100 to date.

Leasing companies are continuing to position themselves at the forefront of the EV transition, with UK companies Fleet Alliance, Ogilvie and Tusker all joining us in 2020. Between them they have committed to switch over 70,000 vehicles to EVs by 2030.

In India, we've welcomed e-commerce giant Flipkart after it made a commitment to convert 26,000 vehicles to EVs and install charging at 1,400 hubs across the country by 2030.

There have also been additions to our contingent of healthcare companies with US headquartered Biogen and UK headquartered GlaxoSmithKline joining us in 2020. We were also delighted to be joined by Tesco. Our first supermarket member in the UK committed to electrifying its delivery fleet of over 5,500 vehicles as well as installing charging at 600 stores.

In addition, we've welcomed our first Australian member, AGL; first Norwegian member, Statkraft; and first member headquartered in Latin America, InterEnergy, taking us to 22 headquarter markets covered by EV100 commitments.

EMR, LONGi Group and Willmott Dixon also became the 9th, 10th and 11th companies to become a coveted "triple joiner" of the Climate Group's campaigns, which also include EP100 and RE100.

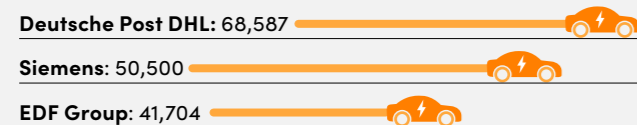
Aside from new members, Mitie has strengthened its ambition by bringing forward its target to switch 5,100 vehicles to EV by 5 years to 2025.

The continued growth of the campaign and scale of the commitments being made demonstrates that, despite a year of turmoil, the momentum of the shift to clean transport is still in full swing.

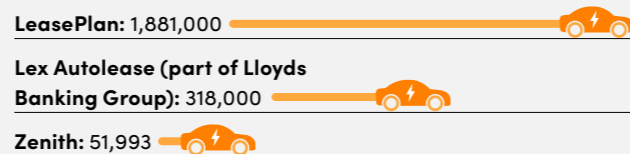
EV100 membership by commitments



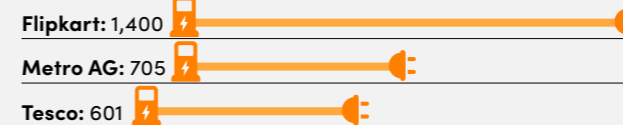
Top corporate fleet commitments by company



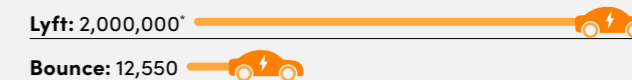
Top leasing company customer fleet commitments



Top charging commitments by company (locations)



Top Transportation Network Company (TNC) commitments



* See footnote in the Annex on p.25 for further details.



Hailing in an all-electric future

From its beginnings, Lyft has been committed to sustainability. The uncertainty and turmoil of the COVID-19 crisis has only helped to accelerate Lyft's sustainability agenda, sensing an opportunity to build back better and come out as a more resilient company.

In 2020, Lyft made EV100's biggest vehicle-related commitment to date, committing to reach 100% EVs on its platform by 2030; Lyft expects there to be more than 2 million vehicles that will be used on its platform over the next 10 years*.

Tackling local air pollution and reducing greenhouse gas emissions are at the heart of Lyft's commitment. Two-thirds of its drivers identify as members of minority

groups, who tend to live in communities with disproportionately higher levels of air pollution, as well as tend to face greater impacts of the climate crisis. By helping electrify the vehicles on its platform, Lyft hopes that benefits for climate, health and social equity will go hand-in-hand.

By working closely with policymakers to implement incentives to make EVs more accessible, educating drivers on the benefits of switching to EVs, as well as aggregating and

* This case study contains forward-looking statements about Lyft, including statements about Lyft's strategies and commitment to electric vehicles on its platform. For please see footnote in the Annex on p.25 for further details.



By helping to solve one of the biggest pieces of the climate challenge, we believe we can provide direct economic benefits to rideshare drivers and environmental benefits to communities most heavily impacted by smog and asthma.

Sam Arons, Director of Sustainability, Lyft

communicating the demand signal from the community of drivers, Lyft hopes to overcome the barriers that still exist.

In the short term, Lyft is focusing on high-mileage drivers on the platform who participate in Lyft's Express Drive rental partner program, who may already see promising cost benefits by switching to EVs due to fuel and maintenance cost savings. Drivers renting EVs through Express Drive already save on average \$50-70 per week on fuel costs alone*. By 2030 Lyft expects reduced vehicle operating costs will result in savings up to USD \$10 billion for drivers.

Lyft is also pushing for policy change to accelerate the transition. In Colorado, Lyft worked with local officials to help rental

programs like Express Drive access a state-level tax credit that had previously not been available to corporate entities. As a result, in Denver Lyft has enabled access to 200 EVs through Express Drive, the single biggest EV deployment in the state.

The impact of Lyft's commitment could have wider impacts too. With each EV on the Lyft platform providing rides to many people per year, more people can be exposed to EVs and their benefits as they speak with drivers and experience the technology.

By being at the leading edge of the transition, Lyft hopes to inspire others through EV100 and show that we can make EVs the new normal by 2030.



Speed

Not only are we seeing strong growth in EV100 commitments, members are also continuing to take action at speed. In the context of the impact that COVID-19 has had on the global market, this progress is even more impressive.

EDF has installed 276 charging points and deployed 164 EVs at its Bugey nuclear power plant.

In fact, over half of EV100 members report that they have either continued on the same trajectory or, in some instances, sped up their progress towards meeting their commitments in the last year.



169,638
EVs deployed
by members

Since the 2020 Progress and Insights Report, the number of EVs deployed by members has grown from 80,000 to over 169,000 this year.

Leasing companies are at the forefront of EV deployment in their customer fleets, making up a major part of the EVs deployed across the wider membership.

By working closely with clients, including other EV100 members, leasing companies are playing a key role in accelerating the switch to EVs.

EV100 members with major fleet additions this year include EDF, who have added 840 EVs since the last Progress and Insights Report, the biggest increase in that time period. Mitie has added 672 EVs in the same time frame.

Overall, we have seen an 89% increase in the number of EV 4+ wheel passenger vehicles within members' corporate fleets from last year.

AstraZeneca has added 530 EVs to its fleet, with significant deployment across Europe, including Spain and France. Elsewhere, Royal HaskoningDHV has now switched 66% of its passenger vehicle fleet to EV, after adding over 170 EVs to its fleet in the last year, supported by its "EV-only" company car policy.

For commercial vehicle segments, the barriers remain higher, with many EV100 members identifying commercial vans (61%) and heavy-duty vehicles (53%) as the most challenging EV vehicle type to procure.



Having committed to decarbonise our fleet by 2030, vehicle supply has been one of the most difficult barriers to overcome. We spent some time looking for the right vehicle that met our business needs. Ordering 1,000 Vauxhall electric vans sent a signal to the industry that the demand is there and it's encouraging that the OEMs are responding positively.

Steve Winter, Head of Fleet, Centrica



Schneider Electric

Despite this, we've seen significant advances in this area from EV100 members over the last year, with a 23% increase in the number of electric 4-wheel commercial vehicles from last year, including more than a three-fold increase in electric medium to heavy-duty (3.5t – 7.5t) vehicles.

For example, Deutsche Post DHL has nearly tripled its number of medium to heavy-duty electric vehicles, while Tesco has launched 30 new electric delivery vans on the roads in London.

We are also continuing to see electric truck pilots, with DHL debuting the UK's first purpose built, fully electric 16t truck in London in November 2020. Elsewhere, CLP Group has been trialling a 5.5t electric truck in Hong Kong.

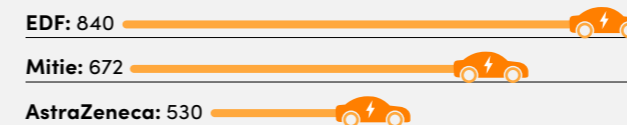
Elsewhere, Airport Authority Hong Kong has continued the electrification of its ground service equipment (GSE) (e.g. conveyor belt loaders), with 95% of GSE being electric-powered or zero-emissions. As well as deploying electric GSE and port cargo handling equipment, Port Authority of New York and New Jersey has completed the electrification of its 36 regular-route shuttle bus fleet with the procurement of 18 additional buses in 2020.

Electric motorised 2/3 wheel vehicles (e.g. mopeds & rickshaws) likewise play a vital role in certain sectors and markets. In the postal sector, Swiss Post has deployed over 5,800 2/3 wheel electric motorised commercial vehicles to support with deliveries. In India, where 2/3 wheel vehicles make up 95% of vehicle sales, scooter rental company Bounce is continuing to add EVs to its fleet after successfully piloting 100% EVs in Bangalore for three months.

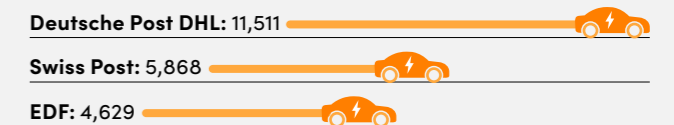
Not included in this year's calculations are an estimated further 14,000 motor-assisted 2/3 wheel vehicles (e.g. e-bikes and e-scooters), which likewise play a crucial role in the postal sector, particularly in urban centres.

In a year of upheaval and uncertainty, it has been exciting to see EV100 members continuing to advance their commitments over 2020. This trend is set to continue with sizeable orders placed for EVs in 2021. In the UK, for example, three companies alone are expected to procure approximately 3,500 EVs over the next year.

Top year-on year corporate fleet EV deployments increases



Top corporate fleet EV deployments



* Previous reports had not distinguished between fully motorized (e.g. mopeds, rickshaws) and motor-assisted vehicles (e.g. e-bikes). This further differentiation has now been added for clarity, and only fully motorized vehicles included into the calculations.

EV100 member fleets breakdown

Battery Electric Vehicles (BEVs) remain the preferred choice of EV, accounting for 82% of all EVs within the EV100 corporate fleets and 76% in leasing company customer fleets and TNC platforms. Although Plug-In Hybrid EVs (PHEVs)

continue to play an important bridging role, the increasingly mature EV battery technology and proliferation of public and private charging make the business case for a straight switch to BEVs increasingly stronger.

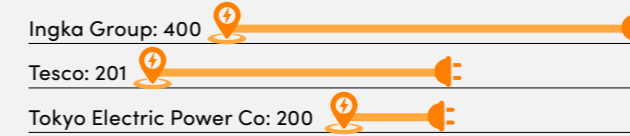
Corporate Fleets

		ICE	CNG/LNG	BEV	PHEV	FCEV	Total
Passenger vehicles	2/3 wheels motorised < 3.5t	501	-	64	14	-	579
	4+ wheels < 3.5t	136,828	426	8,801	6,729	6	152,790
	4+ wheels 3.5t – 7.5t	1,803	49	234	8	-	2,094
Commercial vehicles	2/3 wheels motorised < 3.5t	1,491	-	6,251	-	-	7,742
	4+ wheels < 3.5t	171,724	769	14,273	49	1	186,816
	4+ wheels 3.5t – 7.5t	13,769	93	1,225	13	-	15,100
Total		326,116	1,337	30,848	6,813	7	365,121

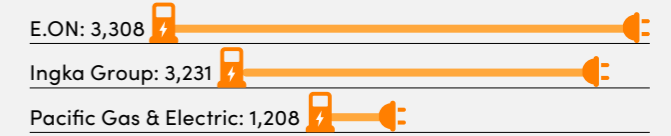
Leasing customer fleets/TNC platform


		ICE	CNG/LNG	BEV	PHEV	FCEV	Total
Passenger vehicles	2/3 wheels motorised < 3.5t	10,000	-	2,550	-	-	12,550
	4+ wheels < 3.5t	3,661,252	1	78,746	31,464	9	3,771,472
	4+ wheels 3.5t – 7.5t	262	-	-	-	-	262
Commercial vehicles	2/3 wheels motorised < 3.5t	156	-	-	-	-	156
	4+ wheels < 3.5t	513,446	1	17,567	114	-	531,128
	4+ wheels 3.5t – 7.5t	36,648	-	1,520	-	-	38,168
Total		4,221,764	2	100,383	31,578	9	4,353,736

Top charging deployments locations



Top charging deployments charge points




2,090
Locations with charging installed

EV100 members are expanding charging infrastructure availability at their premises for staff and customers. Since the last report, there has been an 84% increase in the number of locations with charging available to 2,090 and the number of individual charge points has increased by 79% to 16,882. 68% of these charging points are fast chargers.

Free charging continues to be the most common approach offered by members, with 51% of workplace charging and 44% of customer charging entirely, or at least mostly, free of charge for users.

EV100 members are also increasing the prevalence of renewables to power their charging infrastructure. 50% of members are powering their EV charging using 100% renewables, a 7% increase on last year. 89% of members are powering their charging with at least some renewables, a 1% increase from last year across the growing membership.

Millions of customers worldwide are benefiting from charging rolled out by members. Ingka Group have installed charging at 90% of their stores worldwide now, meanwhile Metro AG are installing charging across Europe including


recent installations in Poland, Portugal and Moldova.

EV100 members are rolling out charging at their offices, factories and construction sites, as well as providing home chargers.

For example, Iberdrola and TEPCO have both installed charging at all office locations to support EV uptake by staff.

Challenges remain for employees without access to off-street parking at home, an area where supportive action from (local) government is required.

Members are continuing to develop innovative technology and solutions for charging and batteries. Delta Electronics, for example, have developed a charging station in Yokohama, Japan, capable of assisting as a disaster response base through energy storage. In India, Bounce has established 100 battery swapping stations for customers and is now collaborating with OEMs to make their swapping stations accessible to the general public and any delivery or fleet operator in the 2/3 wheeler segment.


16,882
Charging units installed



Bounce has used the challenges of COVID-19 as an opportunity to accelerate the transition to a 100% EV fleet and is committed to providing clean & affordable mobility. Being the largest high-speed EV fleet in India, we are confident that our efforts will help enhance the benefits of shared mobility and as a result accelerate electric vehicle adoption as a whole.

Vivekananda Hallekere, CEO & Co-Founder, Bounce





Austrian Post will make the city of Graz the first in the country to receive emission free deliveries by August 2021.

Green Graz

Boasting over 1,000 BEVs in its fleet, Austrian Post is leading by example not only in the country, but in the postal sector too. Having deployed nearly 800 electric light commercial vans, as well as over 400 electric motorised 2/3 wheelers and over 600 e-cargo bikes, Austrian Post is not only demonstrating the transition can be done, but that it can also be good for business too.

Until recently, Austrian Post has taken the approach of deploying EVs across the country gradually to learn about how to use the vehicles and supporting infrastructure. Now the company is stepping up its action at speed. Its current lighthouse project is to make the city of Graz the first in the country to enjoy emission free deliveries by August 2021.

As part of the "Green Graz" project, they are rolling out 130 BEV delivery vans for letters and



The Green Graz project is a milestone for us. Based on our experiences since 2011, we have learned that BEVs are the best option for us in last mile delivery. By installing our biggest charging site, with 65 smart chargers, our intention was to take the next step in building zero emission free delivery and show that it is already possible.

Paul Janacek, Vice President, Head of Group Fleet, Austrian Post

parcels across the city region, supported by two emission free logistics depots. The vans will be powered by 65 smart chargers at each depot. The depots will use software to manage energy distribution and power consumption, and will be among the largest charging clusters in the country.

For Austrian Post, the transition to EVs has not just enabled them to reduce emissions, but it's backed up by a strong business case.

Having deployed over 1,000 EVs, the company is confident that BEVs are more suitable for last mile delivery than their ICE alternatives. As well as seeing significant fuel savings from BEVs, the simplified construction of a BEV means maintenance costs have reduced by more than 50%, which is vital for delivery vehicles that are stopping and starting up to 200 times per day.

Strong government subsidies and tax exemptions for zero emission vehicles have also supported the business case even further, including for bigger commercial parcel delivery vans.



AEON MALL has installed charging at nearly 80 retail locations across Japan.

Charging ahead in Japan

With retail having a key role to play in public EV charging provision, we're excited to see EV100 members stepping up and providing their customers access to EV charging across their stores and malls. Having installed nearly 1,200 charge points at 78 locations, shopping mall developer AEON MALL is leading the way in Japan.

Access to charging infrastructure isn't just a barrier for EV100 members; it's one for the general public too. For those that can't charge their vehicles at home or at work, lack of public charging can contribute to range anxiety and lack of confidence in the EV transition.



By installing EV charging, we want to enable our customers to make the switch to EVs, as part of our aim to protect the global environment and transition towards a sustainable society.

Shu Adachi, CSR Promotion Group, AEON MALL

AEON MALL is playing a vital role in alleviating these concerns. A member since 2017, AEON MALL has installed charging at almost all its shopping malls in Japan, with plans to further increase their charging provision in the early part of 2021.

EV charging has become an increasingly valuable part of the customer experience for AEON MALL, with utilisation rates of their quick chargers steadily increasing over the past 5 years. Now, informed by their experience, their new stores start with a basic installation of two fast and normal chargers ahead of expansion based on their usage.

Long term, AEON MALL's aim is to install up to 17 fast chargers in each mall by 2030, depending on the size of the mall.

Innovation is at the heart of their approach. At their Sakai Teppochō mall in Osaka, AEON Mall has conducted tests using Vehicle to Home (V2H) technology to utilise electricity stored in the batteries of EVs to help provide power to the mall when electricity demand is at its highest. In return, customers who participate are awarded points to use at AEON MALL stores.

With the transition to EVs being accelerated in Japan, progress by EV100 members such as AEON MALL will give confidence that public charging can play, and is already playing, a crucial role.

Collaboration



We see the health of people and the health of the planet as a circular relationship; this is a key driver for this change at AstraZeneca. Our employees and stakeholders are becoming increasingly aware of environmental issues and hold the business accountable for taking action.

Katarina Ageborg, AstraZeneca

Swiss Post has deployed nearly 6,000 EVs in its fleet.

Swiss Post

Barriers

EV100 members reported lack of charging infrastructure (67%), lack of correct vehicle type (64%) and capital cost (58%) as the most significant barriers.

Access to charging has been a significant barrier particularly for members based, or with operations, in the UK and US. Although EV100 members are stepping up to support EV uptake by staff and customers, further support and investment from governments and the private sector is required to accelerate the wider transition and develop national and local charging infrastructure plans.

The lack of availability of the correct vehicle type is the primary challenge for members when it comes to vehicles, being identified as one of the

top two barriers in the EU, France, India, Japan, UK and US.

The primary vehicle types that companies are lacking are light-commercial and heavy-duty vehicles. Although the number of electric commercial vehicles deployed by EV100 members is increasing (see p.10), demand continues to outstrip supply.

However, there are signs things are changing. With numbers of new electric commercial vehicle models expected to continue to grow³ and big orders being fulfilled, particularly in the UK (see p.11), we are starting to see the market shifting.

Capital cost remains a leading barrier for many members, especially for larger vehicle segments. Although projections suggest we will begin to reach up-front price parity in some vehicle segments between EVs and petrol and diesel

Drivers

The most significant drivers for the transition to electric mobility continue to be reducing greenhouse gas emissions (92%) and air pollution (86%), highlighting that commitment to the climate agenda remains unchanged despite COVID-19.

This comes as no surprise and we expect, as momentum continues to shift towards a green recovery, to see more companies step up their climate ambitions.



Electrification of transport is the future, and we feel the strategy of being ahead of the curve in this transition will bring financial, reputational and environmental benefits.

William Sanders,
Chief Executive, Mawdsleys

85% of members see reputational benefits to be a significant driver, a 4% increase from last year. That along with wanting to lead the transition to electric mobility (81%) shows how companies are identifying a potential competitive advantage in getting ahead of the curve and helping to shape the transition, as customers and staff demand more climate action from companies.

Although cost savings don't currently feature as a leading motivation for companies to commit to driving the EV transition, EV100 members benefit from significant cost savings from switching their fleets.

For example, a cost savings analysis by OVO found that engineers using EVs were saving 50% on fuel compared to petrol and diesel drivers. Lyft is similarly finding savings of \$50-70 per week for drivers on fuel costs alone and expect over the next 10 years their 100% EV commitment will result in up to \$10 billion in cost savings for drivers on its platform*.

* See footnote in the Annex on p.25 for further details.

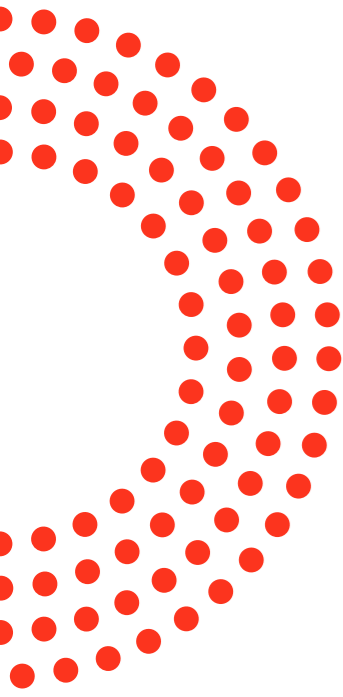
Royal Haskoning has already converted 66% of its vehicles to electric.



COVID-19 has presented us with a unique challenge to rebuild our businesses and communities in ways that are better, cleaner and more sustainable for the future."

Sam Arons, Director of Sustainability, Lyft

Royal HaskoningDHV



The majority of charging for our electric vehicles takes place at employees' homes, so getting residential charging infrastructure right is vital to leveraging the benefits of EVs being 'good-to-go' every morning. Nearly half of our fleet drivers don't have off-street parking at home and when it comes to on-street and communal EV charging infrastructure, the UK still has a long way to go.

Simon King, Mitie

equivalents in Europe from 2022⁴, government policy that supports EV uptake is still important to plug the gap over the next few years. Consequently, a majority of EV100 members would like to see more EV procurement tax benefits (71%) and EV procurement grants (60%).

EV100 members are also calling for supportive policies from state, regional and city governments (70%), highlighting the crucial role these actors play in the EV transition. Many state and regional governments, including members of the Climate Group's Under2 Coalition, have already set ambitious goals and implemented strong policies to support the EV transition.

California, for example, set an ambitious goal in 2020 to reach 100% zero emission vehicle (ZEV) sales by 2035⁵, supported by a ZEV mandate.

60% of EV100 members also want to see governments setting long-term trajectories such as phase out targets for petrol and diesel vehicles. With the UK Government recently committing to end the sale of petrol and diesel sales by 2030⁶, joining countries such as Denmark, Ireland, Netherlands and Sweden⁷, this should give further governments confidence to pursue similar ambitions.



One of Mitie's nearly 800 electric vehicles outside Edinburgh Castle.

Accelerating Markets

As the EV100 membership continues to grow, members are playing an increasingly important role in influencing policy and market frameworks. We're working closely with members to call on national and sub-national governments to introduce policies to accelerate the EV transition.

In partnership with BT Group we launched the UK Electric Fleets Coalition, bringing together nearly 30 companies calling for the UK Government to set a target of 100% EV sales by 2030. Throughout 2020, we pushed out our key policy messages to government officials, parliamentarians and the media.

Subsequently, in November 2020, UK Prime Minister Boris Johnson announced the decision to bring forward the end date for new petrol and diesel vehicles to 2030, providing an important signal to other countries to step up their electro-mobility ambition in the run up to COP26.

Elsewhere, we have worked with members and Transport & Environment, a European clean transport campaign group, to call on the EU Commission President for EVs to play a central role in the EU's plan to drive a green recovery from the COVID-19 pandemic. This resulted in a plan committed to "sustainable transport⁸ infrastructure and enabling the shift to clean urban mobility⁹".

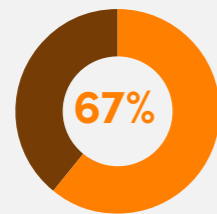
In the US, nine EV100 members have supported the Transportation and Climate Initiative Memorandum of Understanding¹⁰, dedicated to reducing emissions from transport and creating funding for sustainable transport solutions. As of December 2020, it had been formally signed by Governors in three states and the Mayor of Washington D.C., with more states committed to further develop the program¹¹.

In India, in collaboration with the World Business Council for Sustainable Development, we're working closely with EV100 members to develop concepts and guidance pieces such as sectoral roadmaps to help drive the market forwards.

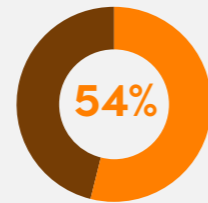
To address the challenges around medium and heavy-duty vehicle segments, we have been working in partnership with the Transport Decarbonization Alliance and CALSTART to co-lead the "Getting Zero Emission Vans and Trucks on the Road!" series. The series aims to connect the supply and demand of commercial electric vehicles and accelerate the development of the market. The results of these dialogues will be presented to high-level decision-makers at COP26.

With the postponed COP26 scheduled for November 2021, the coming months will be critical to encourage more companies to join our movement, set ambitious commitments and subsequently align their advocacy agenda. As national governments gear up to strengthen and reinforce their existing climate pledges, the time for cross-stakeholder leadership is now.

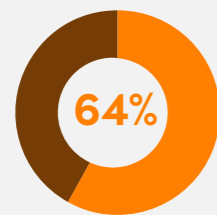
Top 5 Barriers To EV Adoption



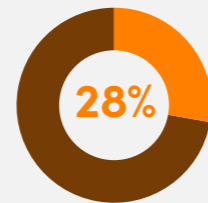
Lack of charging infrastructure



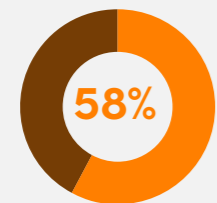
Operational change impacts (e.g. time for charging)



Lack of correct vehicle type



Uncertain/underdeveloped policy landscape for EVs



Capital cost of EVs



One of Ingka Group's newly developed electric trucks in Paris.

Ingka Group

Co-creating zero emission deliveries

IKEA Retail (Ingka Group) is no stranger to issues around supply and volume of commercial electric vehicles. With a target to achieve zero emission deliveries globally by 2025, there is no time to wait around for the solutions to come to them. Instead, IKEA is co-creating fit-for-purpose vehicles themselves.

Developing a vehicle suited to their needs required strong collaboration, which they found from OEMs Renault and MAN. The result is a 20m3 box body truck enabling the company to load its vans with full pallets specific to IKEA's needs, with a range capable of reaching most of their customers in cities from stores or logistics centres. The bespoke design enables them to optimise deliveries and reduce the number of vehicles on the road.

They managed to get the truck on the roads of Paris within just 6 months from the first meeting



By going directly to the manufacturers, we're sending a strong demand signal. Companies want to buy these vehicles but the products are not there – now is the time for the manufacturers to get ahead of the curve, listen to their customers and get commercial electric vehicles on the roads.

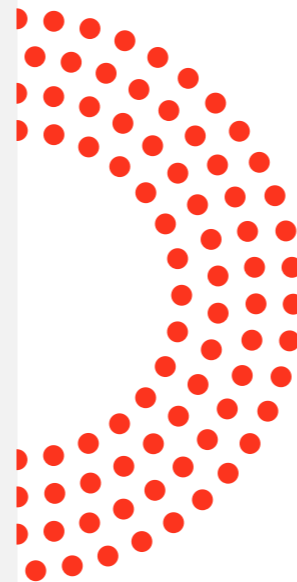
Angela Hultberg, Head of Sustainable Mobility, Ingka Group

with partners. A few weeks later after two rounds of successful tests, the company's French service partners placed an order for its first vehicles.

Following the success of these initial tests, the challenge now turns to scaling up. Their Renault truck is currently half-way through a European tour, having been tested in real last mile environments in Copenhagen, Turku and Amsterdam with further tests in Poland and Switzerland in the pipeline. The aim is to encourage as many of the company's European service providers to place orders as possible.

Other collaborations are now in the pipeline, with tests for heavier duty trucks underway. IKEA Retail see this collaborative approach to be not only an efficient way of working but one that's delivering scalable solutions.

As IKEA Retail accelerates towards its 2025 target, they want to bring their peers along with them. The company decided not to patent the vehicle and is encouraging others to use and benefit from it.



Looking ahead

With the all-important COP26 on the horizon, 2021 offers a major opportunity to capitalise on the progress already being made and make a major push for EVs.

This report demonstrates that, even in the difficult year of 2020, the momentum for EVs is unbroken. EV100 members are pushing ahead at scale and speed, national and sub-national governments are setting ambitious goals and policies, and the industry is starting to respond.

This year, as we begin to look beyond the COVID-19 crisis and rebuild our economies, the transition to a zero-carbon future must be put at the heart of the global agenda.

COP26 in Glasgow presents a major milestone for the global climate agenda; the most important climate negotiations since the Paris Agreement in 2015.

As we see from our members in this report, and the wider market developments, electro-mobility has the potential to be a major pillar of emission reductions efforts towards that 1.5C trajectory.

We're very excited that the COP26 Presidency has made clean transport a major priority within its agenda, and proud that COP26 President, Alok Sharma, has officially endorsed EV100 and called for businesses to join.¹²

As governments consider increasing climate ambitions, EV100 members provide inspiration and confidence to decision-makers on the role clean transport can play. Their experience provides valuable insights on what is required to make the transition happen.

Together with leaders from cities and sub-national governments, manufacturers, investors and many others, we will:

- **Inspire decision-makers through the practical examples of what is already happening;**
- **Push for strong policy targets and implementing frameworks to make electrification the new normal within the Climate Decade; and**
- **Work together in innovative and collaborative ways to overcome the remaining barriers.**

2021 is our chance to put electromobility at the forefront of the agenda for a clean, healthy and equitable transport future.

Join us and be a part of the change.

To learn more about EV100:

- Visit theclimategroup.org/EV100
- Contact EV100@theclimategroup.org



Landsec

Landsec has deployed charging at two-thirds of its locations for staff and customers.

Glossary

BEV

Battery electric vehicle (i.e. fully electric)

CO2(e)

Carbon dioxide (equivalent)

Charge Point

An individual connector that can be used to charge an EV

Commercial Vehicles

Vehicles used for transporting goods

Committed Fleet

Members' vehicles to switch to EV by 2030 (100% vehicles < 3.5 metric tons; 50% vehicles 3.5 metric tons to 7.5 metric tons)

Committed Charging Locations

Company locations to have EV charging installed by 2030. Normally all company locations with parking for employees and/or customers, e.g. offices, shopping malls

Corporate Commitment

Fleet or charging commitment made by a company with regards to their own operations

EV

Electric vehicle (i.e. BEV, FCEV and PHEV)

FCEV

Fuel cell electric vehicle (i.e. hydrogen vehicle)

GHG

Greenhouse gas

ICE

Internal combustion engine

Leasing Company Customer Fleet Commitment

Commitment from a leasing and/or fleet management company to transition its customer fleet to EV or net zero emissions by 2030

Passenger Vehicles

Vehicles used for transporting passengers/people

PHEV

Plug-in hybrid vehicles

TCO

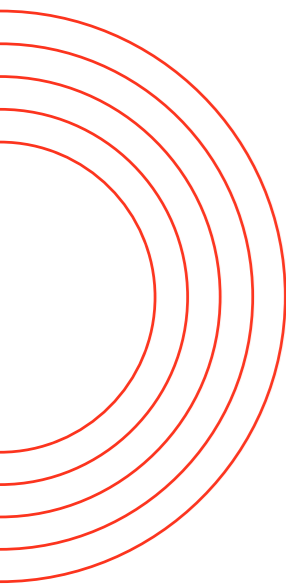
Total cost of ownership

TNC

Transportation Network Company

References

- 1 [Deloitte, Fleet Management in Europe: Growing Importance in a World of Changing Mobility](#)
- 2 [Lyft, Leading the Transition to Zero Emissions: Our Commitment to 100% Electric Vehicles by 2030](#)
- 3 [Global Drive to Zero, ZETI Analytics](#)
- 4 [Bloomberg NEF, Electric Vehicle Outlook 2020](#)
- 5 [State of California, Governor Newsom Announces California Will Phase Out Gasoline-Powered Cars & Drastically Reduce Demand for Fossil Fuel in California's Fight Against Climate Change](#)
- 6 [UK Government, Government Takes Historic Step Towards Net-Zero with End of Sale of New Petrol and Diesel Cars by 2030](#)
- 7 [SLOCAT Partnership, E-Mobility Trends and Targets](#)
- 8 [Climate Group, Business Backs Vehicle Emissions Laws – Letter to EU Policy Makers](#)
- 9 [European Commission, Europe's Moment: Repair and Prepare for the Next Generation](#)
- 10 [Climate Group, Businesses Urge States to Adopt the Transportation and Climate Initiative](#)
- 11 [Climate Group, U.S. Governors and Mayor of Washington D.C. Sign onto the Historic Transportation and Climate Initiative](#)
- 12 [UK Government, COP26 President Alok Sharma at COP26 Business Leaders Event](#)



Iberdrola

Iberdrola has installed charging at all of its office locations for staff.

Annex

Member Summary Table

Member	HQ Location	Joining year	Corporate Fleets		LeaseCo/ TNC Fleets		Service contracts	Workplace charging		Customer charging		Shared Charging	
			Vehicles covered by EV 100 fleet commitment	Vehicles already converted to EV (%)	Vehicles covered by EV 100 fleet commitment	Vehicles already converted to EV (%)		Office sites covered by EV/100 workplace charging commitment	Office sites with charging already installed (%)	Customer sites covered by EV/100 customer charging commitment	Customer sites with charging already installed (%)	Locations with charging for staff AND customers covered by commitment	Locations with charging already installed (%)
AEON Mall	Japan	2017							81	94%			
Aéroports de Montréal	Canada	2019	79	14%			YES	2	100%	2	100%	2	100%
AGL	Australia	2020	360	11%									
Air New Zealand	New Zealand	2018	80	85%			NO	8	100%	2	100%		
Airport Authority Hong Kong (AAHK)	Hong Kong	2018	2,242	37%			NO	1	100%	1	100%	1	100%
APCOA Parking (UK) Ltd	United Kingdom	2019	267	0%			NO	3	67%	89	8%	2	100%
ASKUL	Japan	2017	325	4%									
AstraZeneca**	United Kingdom	2019	16,987	5%				49	31%				
Austrian Post	Austria	2019	8,462	14%				N/A	N/A				
Babor	Germany	2020	66	5%			NO	1	100%	1	100%	1	100%
Baidu	China	2020	46	100%				5	100%				
Bank of America	United States of America	2018						82	70%				
Biogen	United States of America	2020	1,469	1%				39	13%				
BSES Rajdhani Power Limited	India	2019	176	5%			NO	2	100%	14	100%		
BSES Yamuna Power Limited	India	2018	18	56%			YES	5	100%	15	60%	5	100%
BT Group	United Kingdom	2018	28,860	0%				37	100%				
Bounce	India	2019			12,550	20%		2	50%	350	29%		
Centrica	United Kingdom	2019	10,718	4%									
Christchurch Airport	New Zealand	2018	20	55%				1	100%	1	100%	1	100%
Clif Bar & Company	United States of America	2018	42	0%				6	50%				
CLP Group	Hong Kong	2019	944	17%				182	47%				
Danfoss	Denmark	2019	2,155	7%				70	16%	14	43%	14	43%
Delta Electronics	Taiwan	2018	147	14%				20	75%	20	75%	20	75%
Deutsche Post DHL Group	Germany	2017	68,587	17%			NO	N/A	N/A				
Dixons Carphone	United Kingdom	2019	575	0%			NO	5	100%				
Drover	United Kingdom	2019	2,350	15%									
E.ON	Germany	2018	21,265	10%				200	78%	200	78%	200	78%

Shaded boxes reflects company commitment areas

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EDF Group	France	2017	41,704	11%										
EDP - Energias De Portugal	Portugal	2020	3,285	11%										
Efacec	Portugal	2020	415	6%					3	100%	3	100%	3	100%
EMR	United Kingdom	2020	411	0%										
Fleet Alliance	United Kingdom	2020	10	100%	37,000	7%		2	50%	2	50%	2	50%	
Foxtons	United Kingdom	2019	732	8%				1	0%					
Genentech	United States of America	2019	1,309	12%				7	86%					
Genesis Energy Ltd	New Zealand	2018	140	32%				7	57%					
Goldman Sachs	United States of America	2019						53	4%					
Grundfos**	Denmark	2020	2,602	1%				112	6%					
Heathrow Airport	United Kingdom	2017	119	84%			NO	1	100%	1	100%	1	100%	
HP Inc.	United States of America	2018						83	34%	83	34%	83	34%	
Iberdrola	Spain	2019	3,241	8%			YES	59	100%					
Ingka Group	Netherlands	2017	6,981	15%			YES	476	84%	421	90%	421	90%	
John Sisk & Son	Republic of Ireland	2019	538	2%				50	10%	N/A	N/A			
Landsec	United Kingdom	2019						40	65%	40	65%	40	65%	
Leaseplan	Netherlands	2017	2,635	21%	1,881,000	4%		90	28%					
Lime	United States of America	2020	146	4%										
Lloyds Banking Group	United Kingdom	2020	4,339	17%	318,421	8%		55	55%					
Lyft*	United States of America	2020			2,000,000	1%								
Mawdsleys	United Kingdom	2019	95	9%			NO	6	50%					
Mercury	New Zealand	2017	118	69%			NO	21	90%					
Meridian Energy	New Zealand	2019	147	33%			YES	9	100%					
Metro AG	Germany	2017					YES	22	82%	683	16%			

* Factors that could cause actual results to differ materially from those addressed in this forward-looking statement are detailed in Lyft's filings with the Securities and Exchange Commission. Lyft does not undertake an obligation to update its forward-looking statements to reflect future events, except as required by applicable law.

** Members also reported existing EV infrastructure despite only formally being signed up to fleet commitments.

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Mitie	United Kingdom	2019	5,161	15%				22	64%	22	64%	22	64%
Natwest Group	United Kingdom	2018	300	0%				11	45%				
Nippon Telegraph and Telephone Corporation	Japan	2018	10,388	1%									
Novo Nordisk	Denmark	2019	8,342	2%									
Ogilvie	United Kingdom	2020	123	32%	16,352	23%	YES	2	100%	2	100%	2	100%
Ontario Power Generation	Canada	2019	568	24%				20	60%				
Ørsted	Denmark	2019	271	38%			NO	31	35%				
OVO	United Kingdom	2020	2,100	5%				102	15%				
P3	Germany	2020	55	53%				17	24%	17	24%	17	24%
Pacific Gas and Electric Company**	United States of America	2017						121	66%				
Port Authority of New York & New Jersey	United States of America	2018	1,284	21%						5	100%		
Post CH Ltd (Swiss Post)	Switzerland	2019	10,889	54%				16	44%	16	44%	16	44%
Rentokil Initial plc	United Kingdom	2020	18,708	0%									
Royal HaskoningDHV	Netherlands	2017	570	66%			YES	12	100%	12	100%	12	100%
Schenker AG	Germany	2018	298	10%			NO	70	33%	70	33%	70	33%
Schneider Electric	France	2020	16,595	1%				293	22%	293	22%	293	22%
Severn Trent Plc	United Kingdom	2020	2,218	0%				60	5%				
Shuttl	India	2019	N/A	N/A						N/A	N/A		
Signify	Netherlands	2018	2,353	1%									
SSE plc	United Kingdom	2019	3,816	3%				20	100%				
State Bank of India	India	2018	1,790	0%			NO	50	0%				
Statkraft	Norway	2020	634	2%									
Takashimaya Company Limited	Japan	2019	408	0%			NO	N/A	N/A	20	25%		
Tarmac	United Kingdom	2020	2,149	2%				10	20%	10	20%	10	20%
Taxelco	Canada	2019	1,255	4%									

Shaded boxes reflects company commitment areas

Member	HQ Location	Joining year	Corporate Fleets		LeaseCo/ TNC Fleets		Service contracts	Workplace charging		Customer charging		Shared Charging	
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Tesco	United Kingdom	2020	5,500	1%				601	33%	600	33%	600	33%
Toyko Electric Power Company Holdings, Inc (TEPCO)	Japan	2019	4,200	10%				200	100%				
Tusker	United Kingdom	2020	73	71%	17,205	19%		1	100%				
Unilever	United Kingdom	2017	11,604	5%			YES	44	32%	13	100%	7	100%
Vattenfall	Sweden	2017	4,587	25%			YES	N/A	N/A				
VMWare	United States of America	2018	5	0%				4	75%	2	50%	1	100%
Wipro Limited	India	2018	953	8%				8	38%				
Zenith	United Kingdom	2020	214	54%	51,993	17%	NO	1	100%	1	100%	1	100%
New members													
An Post	Republic of Ireland	2021	3,600	N/A									
Coca Cola European Partners	United Kingdom	2021	8,350	N/A									
Costain	United Kingdom	2020	2,631	N/A			N/A	25	N/A				
Flipkart	India	2020	26,000	N/A			N/A	1,400	N/A				
GlaxoSmithKline	United Kingdom	2020	19,000	N/A				100	N/A				
Ground Control	United Kingdom	2021	349	N/A				45	N/A	24	N/A	24	N/A
Inter Energy	Dominican Republic	2020	142	N/A			N/A	140	N/A	30	N/A	6	N/A
LONGi Group	China	2020						28	N/A	28	N/A	28	N/A
MindSPACE REIT	India	2020								7	N/A		N/A
Novartis	Switzerland	2021	25,750	N/A									
Origin Energy	Australia	2021	600	N/A									
Quebecor	Canada	2021	1,005	N/A									
Restore plc	United Kingdom	2020	271	N/A				28	N/A				
Siemens	Germany	2021	50,500	N/A				N/A	N/A	N/A	N/A		
Sky	United Kingdom	2021	5,730	N/A									
Willmott Dixon	United Kingdom	2020	490	N/A				20	N/A				
Zurich	Switzerland	2021	4,000	N/A									

Acknowledgements

We would like to thank EV100 members for their support for the initiative and their participation in the annual reporting process. We also express our gratitude to Jamie Clark, Samuel Lloyd and Myles McCarthy at The Carbon Trust for the data analysis, as well as our external reviewers: Cristiano Façanha (CALSTART), Ian Featherstone (Energy Saving Trust), Ekta Meena Bibra and Jacopo Tattini (International Energy Agency), Till Bunsen (International Transport Forum), and Saul Lopez (Transport & Environment).

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

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Design: [Alchemy Mill](#)

CLIMATE GROUP EV100

[EV100](#) is a global initiative led by the Climate Group, which brings together companies committed to making electric transport the new normal by 2030. A large part of the new global vehicle (EV) fleet are purchased by companies, so it's crucial that businesses lead the shift to electric vehicles through their investment decisions and influence on millions of staff and customers worldwide. Members are increasing demand, influencing policy, and driving mass roll-out, helping to make electric cars more rapidly affordable for everyone. [#EV100](#)

In driving corporate EV uptake, we work closely with regional engagement partners: Ceres (U.S.), Japan Climate Leaders Partnership and BCSD Taiwan.

CLIMATE GROUP

The [Climate Group](#) is an international non-profit, with offices in London, New Delhi and New York. Our mission is to drive climate action, fast. Our goal is a world of net zero carbon emissions by 2050, with greater prosperity for all. We do this by forming powerful networks of business and government, unlocking the power of collective action to move whole systems such as energy, transport, the built environment and industry, to a cleaner future. Together, we're helping to shift global markets and policies towards faster reductions in carbon emissions.

Visit theclimategroup.org and follow us on Twitter [@ClimateGroup](#).



The Carbon Trust is a climate change and sustainability consultancy with the mission to accelerate the transition to a low carbon economy by helping governments, businesses and organisations across the world to reduce carbon emissions and achieve greater resource efficiency.